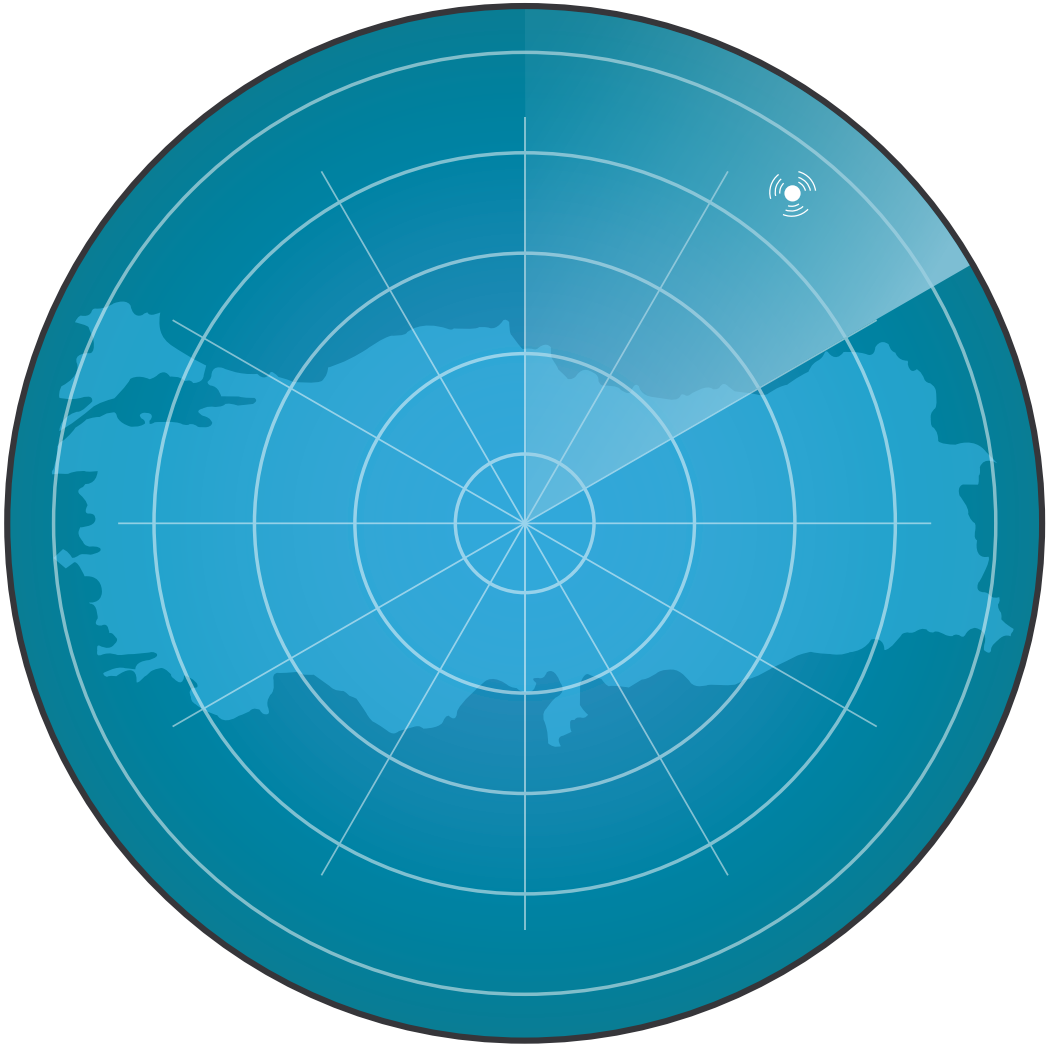




SETA SECURITY RADAR

TURKEY'S GEOPOLITICAL LANDSCAPE IN 2021

Strategic Flexibility under Geopolitical Anxiety

EDITED BY MURAT YEŞİLTAS

SETA | REPORT

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under Geopolitical Anxiety*

SETA

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SIYASET, EKONOMİ VE TOPLUM ARAŞTIRMALARI VAKFI
FOUNDATION FOR POLITICAL, ECONOMIC AND SOCIAL RESEARCH
مركز الدراسات السياسية والاقتصادية والاجتماعية

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FOREWORD

The year 2020, which set the stage for extraordinary developments, has now ended. Living the fast life must be the distinguishing feature of modern times, but the pandemic turned everything on its head. Over the last year, the world discussed the COVID-19 pandemic's global effects, the U.S.-China rivalry, the U.S. elections, the EU's lack of coordination, Brexit, the Eastern Mediterranean, Libya, Syrian refugees, the rising anti-Islam rhetoric in Europe, and the Nagorno-Karabakh conflict.

Many of the issues will remain on everyone's radar in 2021 as well. As the U.S. redefines its global role, there is no such thing as the liberal world order any more. International organizations experience more serious problems today than they did in the past. A new, multipolar world is emerging on the back of a great power struggle. There is no single axis, alliance, or great power that can offer to solve all of a country's problems.

The crisis of the liberal world order, which started under U.S. President Barack Obama and continued full swing on Trump's watch, further deepened in 2020 with the side effects of the pandemic. Obviously, we are all praying for good things in Turkey and around the world. But we have to acknowledge and adapt to the chaotic side effects of this period of "great power struggle."

Whereas the West experienced mounting problems in 2020, Russia seemed pretty comfortable. Under Vladimir Putin's leadership, Moscow continued to strengthen its influence over Europe and its military presence in Syria. China, in turn, took political measures to safeguard its trade initiatives, realizing that there is no more room for free-riding on the back of liberal economics. Moreover, China enjoys the advantage of coping with the pandemic while already operating the recovery in the post-pandemic period.

One matter, however, is crystal clear: there will be no shortage of turmoil in Africa and the Middle East in the years to come.

When it comes to Turkey, it seems that Turkey was the region's most active player in 2020. Syria, Libya, the Eastern Mediterranean, the Nagorno-Karabakh conflict, and relations with the U.S. and Russia were on Ankara's foreign and security policy agenda. Turkey has been dealing with the spillover effects of regional turbulence and finds itself in an advantageous position thanks to its political stability and foreign policy activism. Turkish moves in the Eastern Mediterranean, Libya, and Nagorno-Karabakh are crucial demonstrations of that advantage. Obviously, developments in those areas present both opportunities and challenges.

Although governments around the world are busy with the COVID-19 pandemic, Idlib and the fate of Syrian refugees must be on everyone's radar. These issues must be negotiated between the United States, Turkey, and the European Union with an eye on establishing a safe zone in Idlib. Meanwhile, Turkey-U.S. relations must be managed sensitively to prevent a collapse in bilateral relations. After all, U.S. President-elect Biden is expected to oversee foreign policy personally. Experts believe that Washington will pursue a rapprochement with Europe in order to contain Russia. The Biden administration's Middle East policy, too, is likely to reflect that priority. The transatlantic alliance's revival is not easy, and it will be difficult to contain Moscow, which filled the power vacuum that the Obama and Trump administrations left behind.

For Turkey, there are two key points: First, Turkey, a leading NATO ally, balances out the Russian influence in Libya, Syria, Nagorno-Karabakh, and the latest developments in Ukraine. At the same time, Turkey can play a constructive role as a Western ally, a role that the Biden administration will attempt to restore in its effort to compete with Russia. Turkey has developed a way with Russia - between cooperation and conflict - and has shown the ability to compartmentalize the issues of concerns between itself and regional and global powers.

The real question, however, is how Joe Biden will shape relations with Turkey, as he revises Washington's global policy. That question can't be answered at this time. What we do know is that the new U.S. president must realize that Turkey is no lon-

ger in the same position as it was during Barack Obama's second term. That awareness will be crucial in having a positive impact on Turkey-U.S. relations. Ankara currently has a lot more influence across a range of strategically important regions.

On the other hand, Turkey and the EU need to keep talking with one another. European leaders must stop procrastinating and set aside their disagreements to stop Russia from twisting the EU's arm. Greece's inhumane treatment of refugees cannot be Europe's shield against irregular migration. Instead, Brussels must create a broad framework of cooperation with Ankara, involving an updated customs union agreement and additional financial support. In other words, a fresh start is the best available option. In brief, Ankara's ability to reshape the geopolitics of the region through its activism in Syria, Libya, and Nagorno-Karabakh demonstrated the need for Europe to engage with Turkey with a new perspective. The EU should treat Turkey as an ally and candidate country rather than a power that needs to be balanced.

Turkey's increasing material capacity through its active role in Syria, Iraq, Libya, the Eastern Mediterranean, and Nagorno-Karabakh are not motivated by expansionist or maximalist claims, but are a geopolitical necessity to protect its strategic interests and address its security concerns by using diplomatic tools in a broader manner.

In sum, with a global perspective, we will see new approaches in U.S.-China relations on a pendulum of cooperation and conflict. This can both solve and deepen the crisis in the international system. When it comes to Turkey, at the regional level there are two possible key aspects in 2021. On the one hand, while mobilizing the cooperation areas, Turkey will also assess and diversify its political areas of interest. On the other hand, the prospective conflicts will be on Turkey's agenda such as Libya and Syria.

In this manner, SETA Security Radar's study aims to offer a framework assessment of the major hotspots of Turkey's foreign policy initiatives. These hotspots are likely to affect Turkey's national security and by analyzing their roots and effects, the study provides some predictions for the future paths and approaches to Turkey's security and foreign policies. By providing a policy-relevant analysis, SETA Security Radar intends to promote an understanding and awareness among the decision-making circles and those who are interested in Turkey's major security and foreign policy agendas. I would like to end by thanking the entire team that contributed to this study.

Professor Burhanettin Duran
SETA General Coordinator

INTRODUCTION: STRATEGIC FLEXIBILITY UNDER GEOPOLITICAL ANXIETY

The COVID-19 pandemic deeply impacted and shaped the international system in 2020. Not only did it reveal the weaknesses of global governance, but it also put global leadership in question. Weak management of the COVID-19 pandemic in the United States correlated with Washington's decreasing governance in comparison with European and Asian countries. Governance, therefore, became complex at the domestic level, and due to the lack of effective cooperation between states, is now barely existent on the global scale. The transnational threat of the pandemic also affected the geopolitical conflicts by deepening the tensions and increasing the states' survival exigency. As a result, the concept of strategic self-determination has emerged whereby each country seeks to enrich and develop its strategic identity and approaches any kind of regional or institutional order independently. This ongoing structural change opened the door for a new debate about whether the dynamics of the post-pandemic era will differ from the current dynamics.

What is for sure is that the dynamics of this intensively competitive era have produced what we can call *geopolitical anxiety*. This new form of global anxiety can be identified by three components: constant risk, uncertainty, and the ambiguity of the prospects of several global trends. At the outset, the future of the global international order is unclear in terms of its type and integrands. The new system type, the

change in the leading institutions' role, levels, and the new source of ruling norms and regulations will have great implications on the international system. Next, the vagueness of the role of the U.S. and what policies Biden might bring (adverse or constructive) remains a great source of uncertainty. It is not easy to predict the role of the U.S. after Trump's era as he redesigned the U.S. picture and position in the world. Moreover, after decades, the strategic governance of the West remains contentious. The year 2020 increased the intensity regarding who will be the new world leader as the West is gradually becoming a legacy.

In order to maintain its leadership, it's highly possible that the Biden administration's first priority will be China; this will result in more decisive policies toward the Red Dragon. Under this light, the ongoing global economic competition between China and the U.S. has the possibility to turn into a conflict or even a war as China is not stepping back from its effective rule of the markets. At the same time, competition over technology has a similar effect. China's technological capacity in regards to the Digital Silk Road worries the U.S. This digital and technology eagerness is expected to escalate competition to wider issues and countries. Consequently, the process of building new national identities has led to the use of economic and regulatory tools such as sanctions as strategic weapons.

The year 2020 witnessed the rise of human insecurity not only in terms of the pandemic but also as a result of the continuation of military threats as conflicts took place all around the world from Syria to Libya, with no clear ending in sight. The nature of the warfare and conflicts, and the type of actors involved are in constant flow. Similarly, the increase in the activities of the international terrorist organizations, which are also gradually upgrading their warfare capacity, produced inevitable risks and lasting fear, making this phenomenon even harder to counter. The continuation of the conflicts and the rise of terrorism will play an important role in the states' overall security landscapes.

Turkey's security landscape was among those most impacted in 2020. As the year draws to an end, Turkey finds itself engulfed in this geopolitical anxiety, facing a series of ambiguities and insecurities, exacerbated by the fact that Turkey is in a difficult, conflict-ridden region. The nature of the conflicts surrounding Turkey is such that this strategic anxiety transcends into Turkey's security landscape. Turkey's security landscape is the result of Turkish endeavors to alleviate this anxiety and may be grouped under several points, all of which are elaborated at great length in this report. These points are Turkey's relations with the United States, its relations with Russia, the Syrian crisis, the dispute in the Eastern Mediterranean, the developments in Libya, the current state of the Middle East, Turkey's efforts to counter terrorism,

and, lastly, the growing significance of Turkey's defense industry. Additionally, as can be observed in the security community survey¹, many experts believed that the Eastern Mediterranean dispute dominated Turkey's foreign and security policies in 2020. Furthermore, the experts perceived the Turkey-U.S. relations as the second most important issue that dominated Turkish foreign and security policies in 2020.

FIGURE 1: TURKEY'S SECURITY LANDSCAPE PROFILE IN 2020



¹ The Security Community Survey was conducted by Security Radar Team in December 2020, with the participation of 54 security and foreign policy experts from different levels.

Turkey's security landscape is shaped by a series of conjectural and ever-changing dynamics. First among these is the presence of active military conflicts. Turkey sits at the nexus of some of the world's most conflict-ridden areas. At the moment, active conflicts are being waged in Syria, Libya, Yemen, the Caucasus, the Eastern Mediterranean, and Ukraine - to name but a few. While Turkey might not be a party to all of these conflicts, it must still brace itself for potential spillover effects. For instance, Turkey has faced continued waves of migration as a result of the conflicts in Syria and Iraq, and the total destruction of the state apparatuses in those countries.

The second dynamic shaping Turkey's security landscape is the persistence of power politics at several levels. Power politics are manifest at the intraregional, interregional, and extra-regional stages. For instance, at the intraregional stage, Syria comes to mind, where several actors, Turkey included, are directly engaged in the war-torn nation. Interregional disputes involve an array of regional actors, such as the dispute in the Eastern Mediterranean, where Turkey alongside other Mediterranean nations has upped the ante. In terms of extra-regional manifestations of power politics, the obvious case that comes to mind is Libya, where countries from France to the United Arab Emirates (UAE) are all parties to the conflict. These conflicts not only involve direct military confrontation, but also a series of stringent diplomatic engagements.

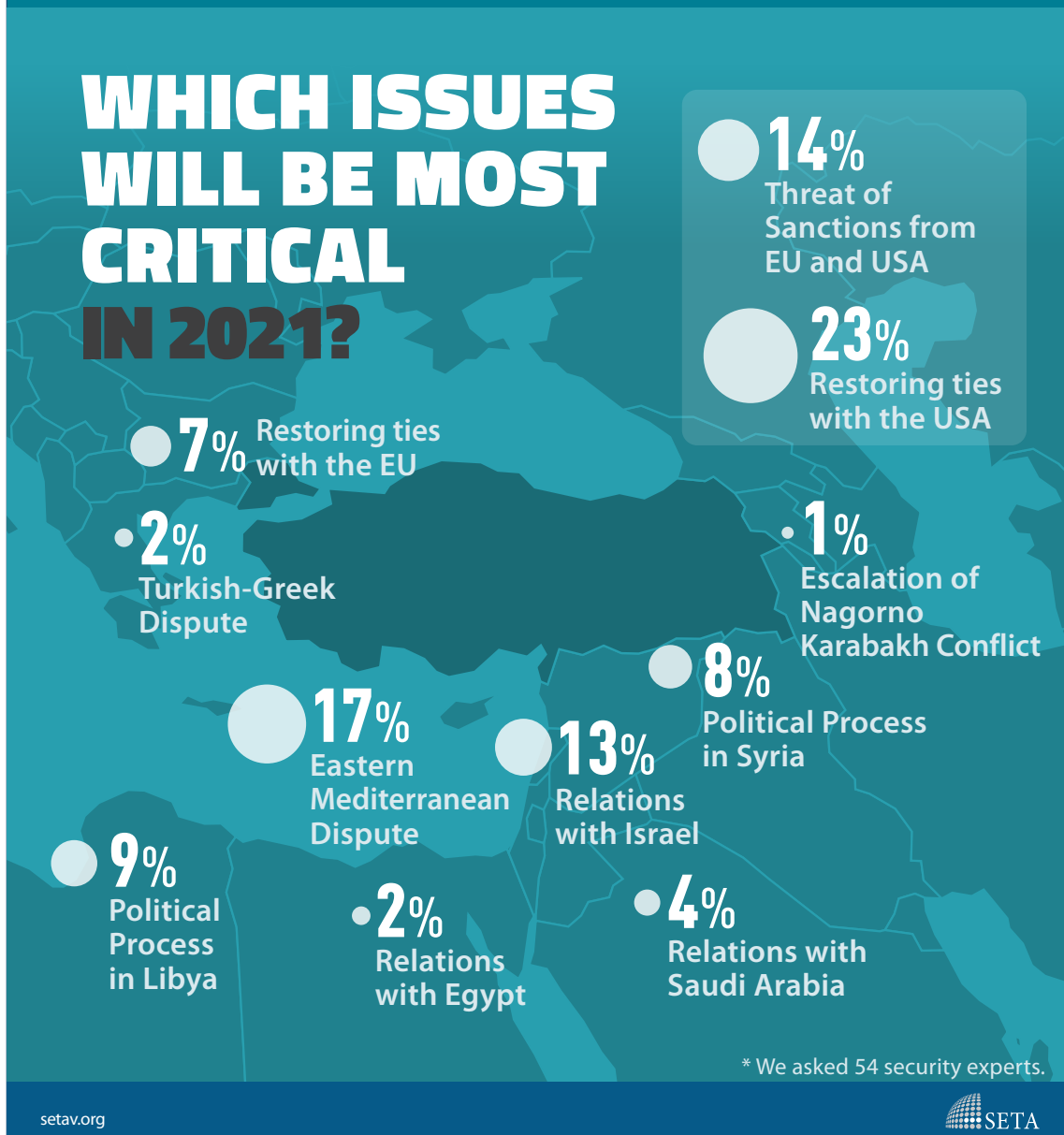
The third dynamic in the equation is the arms race that has materialized in Turkey's region in the last decade. Many regional actors in Turkey's immediate proximity have become increasingly militarized, prompting Turkey to consider a very real security dilemma. This, in turn, has translated into Turkey's development of an indigenous defense industry and the procurement of high-grade weaponry – such as the S-400 systems from Russia – which appear as symptoms of the security dilemma in question.

Terrorism presents itself as the fourth dynamic constituting Turkey's security landscape. Terrorist attacks, on a regional and global scale, have proliferated immensely. This has been coupled with a rise in the number of terrorist organizations and non-state actors, with most of these actors taking shape in Turkey's immediate geographic vicinity. Turkey in this sense has employed an active counterterrorism policy, which serves to uproot foreign domestic terror outlets that present a threat to Turkish sovereignty.

The last dynamic regarding Turkey's security landscape is the political economy of regional events. Turkey's region is home to most of the world's energy resources. Turkey itself, in fact, recently discovered substantial amounts of natural gas in the Black Sea, and is continuing seismic research activities in the Eastern Mediterranean.

This has led to a series of bilateral and multilateral disputes between Turkey and Greece, and more broadly the European Union. The energy trade and the sharing of finite resources continue to shape geopolitical developments in Turkey's region, as many countries are scrambling to lay claim to their portion of the share.

FIGURE 2: WHICH ISSUES WILL BE MOST CRITICAL IN 2021?



In charting a course for Turkey's security direction in 2021, we asked select members of Turkey's security community to comment on what they perceived as being the most crucial potential issues that will shape the future landscape. The experts

appear to have focused on restoring bilateral relations with the United States, and the continuing dispute in the Eastern Mediterranean. In addition, they've stressed the significance of developing ties with Israel. As a result, these are the issues that present themselves as crucial foreign policy points in 2021. Moreover, the threat of sanctions from the EU and the U.S. has also dominated the security community's views on 2021. This highlights the finding that Turkey's foreign policy is at a crossroads and that certain ambiguities of the former era will possibly be resolved. As President Recep Tayyip Erdoğan has stated on numerous occasions, the pandemic will become a tectonic shift in the global geopolitical scene. In the midst of all this, Turkey is poised to embark upon a novel foreign policy paradigm, which contains many opportunities. This is also mirrored in Turkey's assertion that the international system ought to be reformed.

In 2021, Turkey's military activism will likely continue, and not only in terms of hard power and cross-border counterterrorism activities but also in a more nuanced manner that encompasses Turkey's role as a deterrent against expansionist regional actors. In this sense, Turkey might entertain the idea of enlarging its foreign military base presence to include Cyprus. In this sense, Turkey's effective counterterrorism efforts in Iraq and Syria are to continue undeterred in 2021, and will likely expand in scope to become a much larger all-encompassing project.

Turkey's bilateral reset with several regional actors – namely Egypt, Israel, and Saudi Arabia – will likely gain some pace in 2021 as well, as Turkey seeks to restore ties in a win-win manner. Lastly, Turkey's indigenous investments in its defense industry will continue in the form of activism. This will be exacerbated by the enactment of CAATSA sanctions on Turkey, as Ankara seeks to increase deterrence capabilities all the while minimizing the impact of sanctions.

TURKEY-U.S. RELATIONS: BETWEEN CONFRONTATION AND CONCILIATION

SUMMARY OF 2020

- Due to the outbreak of the COVID-19 pandemic, many issues between the United States and Turkey continued to dominate the 2020 agenda as relatively secondary issues.
- The United States continued to support the YPG military and financially in Syria by sending new convoys,² and a \$400 million aid.³
- Washington backed the YPG's efforts to preserve its presence in Syria by signing the oil agreement "Delta Crescent Energy."⁴
- Secretary of State Pompeo lifted the 33-year arms embargo on non-lethal defense articles in Cyprus.⁵

2 "US Continues to Reinforce Military Bases in Syria", Anadolu Agency, September 29, 2020, <https://www.aa.com.tr/en/middle-east/us-continues-to-reinforce-military-bases-in-syria/1986326>. (accessed on December 12, 2020).

3 "US Sent \$400M Aid to YPG/PKK Terror Group in Syria", Anadolu Agency, October 03, 2020, <https://www.aa.com.tr/en/americas/us-sent-400m-aid-to-ypg-pkk-terror-group-in-syria/1994512>. (accessed on December 10, 2020).

4 "Deal between US Oil Firm and YPG/PKK Unlawful", Anadolu Agency, August 05, 2020, <https://www.aa.com.tr/en/energy/energy-projects/deal-between-us-oil-firm-and-ypg-pkk-unlawful-experts/30104> (accessed on December 12, 2020).

5 "Turkey Criticizes US Decision to Lift Cyprus Arms Embargo", *The Washington Post*, September 2, 2020, https://www.washingtonpost.com/world/europe/turkey-criticizes-us-decision-to-lift-cyprus-arms-embargo/2020/09/02/e37514ec-ed0d-11ea-bd08-1b10132b458f_story.html. (accessed on December 10, 2020).

- Senate Democrats urged the Library of Congress to recognize the so-called Armenian genocide after Turkey's strong support to Azerbaijan in the Nagorno-Karabakh conflict.⁶
- The United States offered Turkey Patriot missile systems on the condition that it walks away from the S-400 deal.⁷
- Ankara refused to abandon the S-400 and confirmed Turkey's first test of the Russian missile even though the Pentagon warned Turkey of serious repercussions.⁸
- Secretary of State Mike Pompeo harshly criticized the Turkish government at NATO talks and accused it of straining relations in the Mediterranean and aligning with Russia.⁹
- Turkish President Erdoğan congratulated President-elect Biden and expressed Turkey's willingness and determination to work closely with the new administration and sent a thank you message to President Trump.¹⁰
- The United States officially placed sanctions on the Republic of Turkey's Presidency of Defense Industries (SSB) under CAATSA 231.¹¹

Due to the COVID-19 pandemic and the dynamics of the U.S. presidential elections, a large list of problems couldn't be resolved and dominated the United States and Turkey bilateral relations once again in 2020. Even though the relationship at the leadership level remained steady, the absence of a common threat and the critical long-term strategic divergences resulted in limited alternatives for the two NATO allies to alleviate their differences.

6 "Senate Democrats Urge Library of Congress to Recognize Armenian Genocide", *Al-Monitor*, October 15, 2020, <https://www.al-monitor.com/pulse/originals/2020/10/senate-democrats-letter-library-congress-armenian-genocide.html> (accessed on December 20, 2020).

7 "Turkey Says U.S. Offering Patriot Missiles if S-400 Not Operated", Reuters, March 10, 2020, <https://www.reuters.com/article/us-turkey-security-usa-idUSKBN20X118>. (accessed on December 12, 2020).

8 "Erdoğan Defends Testing Russian S-400, Shrugs off US Criticism", Aljazeera, October 23, 2020, <https://www.aljazeera.com/news/2020/10/23/erdogan-says-turkey-tested-russian-s-400s-shrugs-off-us-reaction> (accessed on December 15, 2020).

9 "Pompeo Criticizes Turkey over Russian Missiles, Alliance Reforms at NATO Talks", France 24, December 2, 2020, <https://www.france24.com/en/middle-east/20201202-pompeo-criticises-turkey-over-russian-missiles-alliance-reforms-at-nato-talks> (accessed on December 20, 2020).

10 "Turkey's President Erdoğan Congratulates Biden on His Win", CNBC, November 10, 2020, <https://www.cnbc.com/2020/11/10/turkeys-erdogan-congratulates-us-president-elect-biden-for-election-win.html> (accessed on December 10, 2020).

11 "The United States Sanctions Turkey under CAATSA 231", U.S. Department of State, December 14, 2020, <https://www.state.gov/the-united-states-sanctions-turkey-under-caatsa-231/> (accessed on December 17, 2020).

At the outset, the Turkish purchase of the Russian S-400 issue continued despite Turkey's removal from the F-35 program last year. The tensions and mutual mistrust increased as the United States kept accusing Turkey of allying with Russia against NATO and U.S. interests. These concerns are not new; however, the situation deteriorated further when the Trump administration approved of imposing sanctions on Turkey over its acquisition and testing of the Russian missile. It is clear that anti-Turkish legislation continues to be a major thorn in the bilateral relationship. In addition to the S-400 file, the situation in Northern Syria is still a strategic challenge. The regional policy gap between the U.S. and Turkey has been widened due to the failure in reconciling their different views on the nature of the YPG. The Washington administration is still supporting the PYD-YPG politically and militarily, therefore underestimating the security threat the terrorist group poses to Turkey.

The United States chose to take a passive stance in many regional conflicts and disputes in 2020. Although the administration made some diplomatic moves in the Eastern Mediterranean, Libya, and the Nagorno-Karabakh conflict, these moves were not only not enough to resolve the disputes but increased the tensions in the bilateral relations with Turkey even more.

DYNAMICS OF THE TURKEY-U.S. RELATIONS

The year 2020 proved that the nature of the Turkey-U.S. relations is not clear and requires redefinition. Although it is categorized as a strategic partnership, today's discourse reveals the ambiguity of both the nature and the dynamics of the relations. More importantly, this ambiguity also characterizes the institutional relationships of the United States at different levels, and directly impacts Turkey, resulting in mutual mistrust. In fact, the U.S. Congress and the White House's rapprochement on common issues demonstrated the inconsistencies and even the contradictions in the U.S. foreign policy. In order to make sense of the current dynamics of the U.S.-Turkey relations, the approaches to the issues dominating the dynamics can be outlined as divergences, convergences, agreements, and disagreements.¹²

The S-400 Thorn

The impact of the S-400 air defense system on the Turkey-U.S. defense relations continued in 2020. Divergence and mutual decisiveness characterize the dynamics of the bilateral relations regarding the issue. On the one hand, after the heavy fighting

¹² This criterion is set up based on the level of accordance and conformity of the United States and Turkey on different issues. The convergence represents full accordance and agreement while divergence full disagreement.

in the Idlib region, the United States rejected Turkey's request for the Patriots and offered them on the condition that Turkey walks away from the S-400 deal immediately. On the other hand, despite the Pentagon's warnings, President Erdoğan confirmed Turkey's first test of the Russian missile in the northern part of the country. As a result of this dynamic, defense cooperation between the two allies is at a lower level in terms of the exchange of defense products. The U.S. even stopped the scheduled delivery of 100 U.S. F-35s to Turkey.¹³

The main source of concern for the United States is Turkey's rapprochement with Russia. Even after the Turkish-Russian differences exploded unexpectedly at the beginning of the year, Ankara worked on overcoming the dispute over Idlib to preserve the alliance. Moscow and the degree to which the S-400 deal compromises NATO security interests explain the U.S. position at the congressional level. As long as the Turkey-Russia relations continue to be solid, Turkey is treated as an enemy more than an ally and the S-400 issue will remain a thorn in the relations.

The failure to resolve the S-400 issue, which has the highest potential of negative impact after the YPG issue in the relations between Turkey and the U.S., continues to be an obstacle for the two allied countries toward convergence and effective cooperation.

The YPG: U.S. Indecisiveness vs. Turkey's Assertiveness

The United States' approach to the YPG in Syria is still a pivotal component of Turkey-U.S. relations. The inconsistencies demonstrated by the rhetoric of U.S. foreign policy impacted the dynamics regarding this issue, as the U.S. administrations have consistently acted vaguely in the region. After the attacks that killed 34 Turkish soldiers on February 27, 2020, in Idlib, the U.S. showed its support to Turkey through active diplomatic channels while the Trump administration made it clear that it stands by Turkey in the matter and that it won't get involved in the war in Syria any further. However, the regional policy gap between the two countries has widened as the political and military U.S. support for the YPG has continued. The oil deal that was signed between the YPG and the U.S. company Delta Crescent Energy (LLC) caused further tension. Although the administration did not play an active role in the completion of this agreement, it made it obvious that it stands by the YPG. In addition, Trump's decision to leave Syria completely was in effect reduced by U.S.

13 Janusz Bugajski, "Alienating Turkey Is a Strategic Mistake", *The Washington Examiner*, December 12, 2020, <https://www.washingtonexaminer.com/opinion/alienating-turkey-is-a-strategic-mistake> (accessed on December 17, 2020).

bureaucracy to a gradual withdrawal. The military presence in the region in order to protect the oil showed that the United States' strategy is still ambiguous.

The divergence regarding the YPG issue remains one of the most important problem areas in Turkey-U.S. relations. While Turkey follows an assertive strategy to protect its borders, the U.S. administration sought to empower the political status of the PYD and the military status of the YPG on different levels. In this manner, the U.S. kept underestimating the immense security threat that the PYD/YPG imposes on Turkey. As long as these policy clashes persist, Turkish-U.S. cooperation in Syria will continue to fail.

The Eastern Mediterranean: U.S. Claims of Neutrality Obscured

Another critical factor of Turkey-U.S. relations in 2020 is their disagreement regarding the Eastern Mediterranean. It should be noted that President Trump didn't get involved in the Eastern Mediterranean issue and it continued to be discussed at the ministerial level. The U.S. administration's support of Greece against Turkey has created a new tension area in terms of the bilateral relations.

In July 2020, the U.S. embassy in Greek Cypriot declared that the U.S. would begin providing international military education and training to Cyprus.¹⁴ Soon after in September, Secretary of State Pompeo waived restrictions on the U.S. sale of non-lethal defense articles and services to Cyprus.¹⁵ The statements and visits by Pompeo, who was aware of the influence of the Greek lobby in Congress, were reflected in the press. He announced future presidential plans that put Turkish-American relations in the danger zone. By taking a more active position on this issue, the United States has created the impression of trying to turn the U.S. Congress against Turkey. More importantly, with the suspension of arms sales restrictions to the Greek Cypriot administration, the United States fully turned its policy in favor of Greece to strengthen relations with the regional partners. As a result, Turkey has no choice but to adopt increasingly assertive policies to protect Turkish influence and maritime territory.

The U.S. and Turkey in Libya: A Potential Bright Spot?

Although the two NATO allies officially support the legitimate government recognized by the UN, they were unable to develop a common vision and strategy for Libya. The dynamics of the bilateral relations in the region are again not clear although they

¹⁴"U.S. International Military Education and Training for the Republic of Cyprus," U.S. Embassy in Cyprus, <https://cy.usembassy.gov/us-imet-training-for-cyprus/>.

¹⁵ "Secretary Pompeo Temporarily Waives Restrictions on the Sale of Non-lethal Defense Articles and Services to the Republic of Cyprus", U.S. Embassy in Cyprus, <https://cy.usembassy.gov/pompeo-temporarily-waives-restrictions-itar/> (accessed on December 20, 2020).

do not seem to be going in a bad direction either. The U.S. administration stated that it supports the political process in Libya and recognized the GNA as Libya's legitimate national body. At the same time, Trump had a phone call with Haftar and signaled a possible change in the U.S. administration's position. Meanwhile, officials argued that there has been no change in the U.S. position and that Washington still recognized the GNA as the legitimate representative government of the Libyan people.

Agreement on this issue is likely to endure for a while since the NATO allies share a common goal: they both want a unified, stable Libya and effective governance that can eliminate terrorist threats in the country. The convergence on this long-term interest, however, may only turn into effective cooperation if the United States negotiates with Turkey on the matter.

Nagorno-Karabakh Conflict: The Missed Chance

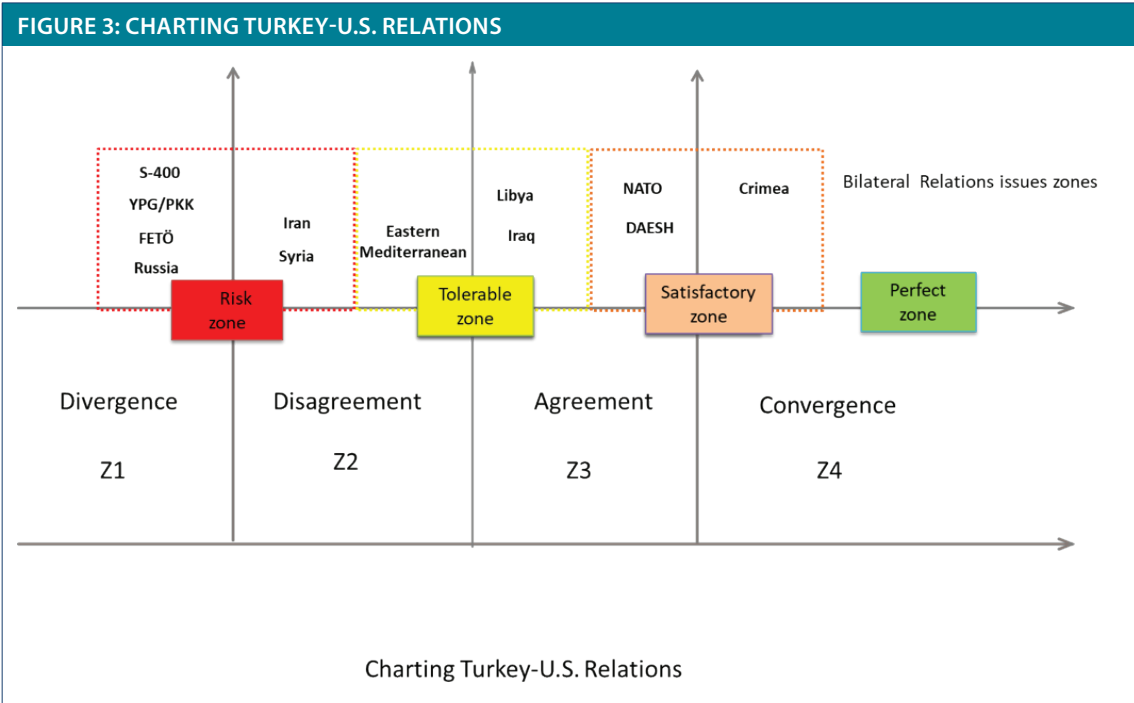
Although the U.S. has economic and military interests in Central Asia and the Caucasus, the Trump administration's response to the conflict in Nagorno-Karabakh was limited, mainly due to the presidential elections. Trump wanted to intervene as a mediator in the Nagorno-Karabakh crisis between Azerbaijan and Armenia to maintain U.S. interests in the region, which are related to Iran's limitations, economic investments in Central Asia, and regional stability. However, once again the lobbying lawmakers in the United States impacted the dynamics of the Turkey-U.S. relations. While Secretary of State Pompeo harshly criticized Turkey's military and political support of Azerbaijan and accused it of increasing the intensity of the conflict in the region, the White House was cautious not to be placed in an awkward position with its NATO ally.

The strategic importance of the issue was not understood by the U.S. administration that was busy with the U.S. presidential elections. In this way, an opportunity for a positive new dynamic in Turkey-U.S. relations was missed.

Extradition of FETÖ Members

The extradition of criminals between Ankara and Washington was supposed to take momentum in 2020. However, even though Turkey has issued multiple extradition requests to the U.S. particularly for Gülen, by sending seven folders full of evidence implicating him in several criminal cases in Turkey, Washington has failed to take steps toward the extradition.¹⁶ The divergence on the matter is expected to cause further tensions between the two allies.

¹⁶ "Turkish-American NGO Urges Congress to Extradite FETÖ Leader Gülen" *Daily Sabah*, July 14, 2020, <https://www.dailysabah.com/politics/turkish-american-ngo-urges-congress-to-extradite-feto-leader-gulen/news> (accessed on December 10, 2020).



Source: Compiled by the authors

Projecting the Future Dynamics of Turkey-U.S. Relations

Turkey-U.S. relations under the Trump administration were greatly impacted by turbulent dynamics. Even though at the leadership level, Erdoğan and Trump's relationship seemed stable, Turkey-U.S. ties are not limited to the presidential level as the countries share an institutionalized relationship. The year 2020 proved that the institutional aspect of the relationship can majorly affect the overall bilateral relations.

How the current dynamics will evolve in 2021 depends on how Biden formalizes the foreign policy of the United States in general - not only toward Turkey. Therefore, the dynamics will change according to the Biden administration's priorities. It can be predicted that China is going to be the first priority, Russia in the second place, and Iran, North Korea, and countering terrorism in Syria will follow. If we observe these priorities, we can easily find that at least three of them are directly related to Turkey. The NATO allies will likely look for a new type of relationship under the new administration; however, they can't easily go back to the strategic partnership model. Hence, it is not difficult to predict that Turkey-U.S. relations will continue to face regional divergences and disagreements regarding relations with Libya, Syria, Iran, and Russia, as well as bilateral issues such as the YPG, S-400, and FETÖ as shown in the model above. Nevertheless, the Biden

administration will differ from Trump's in two main regards. First, the U.S.-Turkey relations are expected to be defined and clear. In his campaign, the elected president declared that he is willing to open active diplomatic channels with Turkey. Yet, Biden will take time to reform the policies toward Ankara and the new U.S. policy direction will take time to be established. Second, Trump is not a predictable person and his policies and positions have been known to be ambiguous. Biden, on the other hand, is more foreseeable. Above all, he is expected to be cautious when it comes to Turkey. It should be noted here that Biden's advisory team includes Antony Blinken, who has been chosen for the position of secretary of state. Blinken places great value on U.S. relations with Turkey and strongly supported the country against the attempted coup in July 2016. Blinken will probably preside over a balanced and smooth U.S. relationship with Turkey.

Concerning the divergence on the S-400 issue, as was predicted, tensions increased when the Trump administration imposed sanctions on the Presidency of Defense Industries (SSB). While trying to maintain its initiative spirituality, the United States sent mixed messages through the imposed sanctions. First, the language of the sanctions should be carefully analyzed. The United States frames Turkey as an important NATO ally, and appears to want to continue the diplomatic negotiations to solve the S-400 crisis. Simultaneously the sanctions are ambiguous: they are imposed on the SSB but it is not apparent which organization or company is the main target. Secondly, when it comes to the technical aspect of the sanctions, it seems that Turkey's military and national defense ministry and the ongoing projects won't be part of the sanctions which means that the opportunity for negotiation is still on the table. To transform the U.S.-Turkey divergence on the S-400 to the tolerable zone at least, active and frank dialogue is required. Currently, there is a clear miscommunication between the two countries. Turkey already proposed a technical working group to find a solution to the S-400 issue as Ankara's position is clear: the use of the missile stand-alone system is only to enrich its warfare capacity, it will not be a part of NATO, and absolutely won't put U.S. and NATO interests in danger. The technical proposition by the Turkish side is acceptable to the U.S. The sanctions underlined that the only option to exit this crisis is to let go of the S-400 completely.

The issue of the S-400 in all likelihood will continue to be in the divergence zone in 2021. If Biden follows a firmer policy, the divergence might lead to a conflict. The U.S. administration and congressional actions regarding Turkey not only have implications on the bilateral ties but also on the U.S. military options in the region and on Turkey's strategic orientation. The expanded anti-Turkish tendencies

in Congress made Turkey's potential counteraction more crucial than ever. Erdoğan made it clear last year that Turkey may close Incirlik and Kurecik bases "if necessary." The possibility of this counteraction has become higher and more concrete than ever before.

Further, the dynamics of the YPG issue in 2021 will change based on Biden's priorities and strategies in the region. The United States' first priority is to fight DAESH. Therefore, the YPG and SDF will be part of the Biden administration's foreign policy in Syria in the context of fighting against terrorism. It is well-known that this policy was originally designed under the Obama administration where Biden and his team played a crucial role. Thus, they are more familiar with this policy than Trump was. The U.S. fight against DAESH in Syria is likely to have three dynamics. The first is the local partners. The YPG as a dominant actor will remain a partner of the SDF and because there are possibilities of a resurgence of DAESH in Syria, the U.S. support to the YPG is likely to continue in order to prevent this probability. The second dynamic is the regional countries' support in the fight against DAESH where Turkey plays an active role in fighting against the terrorist group by providing military support. The main problem, though, is the governance model of the United States in the region. If the Biden administration is going to create a kind of semi-autonomous region with the YPG, intense tension with Turkey is highly expected. The final dynamic is the United States' attempts to separate the YPG and the PKK. By doing so, the YPG becomes a concrete geopolitical risk to Turkey's security landscape. To take this issue to a tolerable zone, the United States must cut its ties with the PKK and YPG completely.

On the matter of the Eastern Mediterranean, Biden has to find a way to manage relations with Congress which proved to be biased and anti-Turkish. There are two possible scenarios related to the new president's policy toward the issue. The first is that the Biden administration will play a role to try to contain the crisis between the two NATO allies and restore neutrality. The second is that it will try to behave in favor of Cyprus by supporting its military to balance Turkey's Mediterranean activism. The first scenario will probably transform the current disagreement into an agreement. However, if the second scenario becomes true, this issue between Turkey and the U.S. might transform from disagreement to divergence and Cyprus will likely be an integral part of Turkey's strategy landscape. In other words, instead of looking for an alternative solution, Turkey will look for a way to establish a military naval base there as a counterreaction. In conclusion, the more the United States

supports Cyprus's defense capacity, the greater military reaction as a countermeasure is expected by Turkey.

Turkey and the United States' positions in Libya are clear. They both officially stand by the GNA and support the Libyan political unity and territorial integrity. Since the Russian involvement in the region is not acceptable by either ally, the consequences of the 2021 election will be likely supported by the United States and Turkey. Therefore, it's expected that the issue will remain in the tolerable zone and will not become a divergence or a convergence.

Apart from these issues, the Gülen problem and disagreement over Iran and Iraq are likely to stay in the divergence zone in the 2021 agenda. Overall, if Biden adopts more stable policies, clear positions, and active dialogue channels, opportunities may arise for greater coordination in both the regional and bilateral relations. Otherwise, the two NATO allies won't be able to manage their current relationship and this will eventually lead to no relations at all.

TURKEY-RUSSIA RELATIONS: BOTH UNEASY AND VITAL

SUMMARY OF 2020

- Russia-backed regime airstrikes martyred 34 Turkish soldiers in Idlib, Syria in late February. Turkey and Russia agreed on a cease-fire in Moscow in March.
- Turkey-backed GNA destroyed more than a dozen Russian weapons and forced Wagner mercenaries to flee from Western Libya. Russia deterred the march of GNA forces beyond Sirte towards the east.
- Azerbaijan liberated its territories from Armenian occupation in Nagorno-Karabakh thanks to the support and expertise of Turkey. Russia brokered a cease-fire between Azerbaijan and Armenia.

Turkey-Russia relations were dominated by the fierce geopolitical struggle between the two countries throughout 2020. The struggle took place in three separate theaters, namely Syria, Libya, and the Nagorno-Karabakh region of Azerbaijan. Respective Turkish and Russian involvements in these three theaters differed in terms of the nature of involvement, the presence of other parties on both sides, and the conflict environment, and thus, resulted in different settings. Yet, one

thing was common in all: Turkey and Russia consistently found each other in opposing camps.

In Idlib, Syria, the face-off created a dangerous possibility of direct confrontation between Turkey and Russia when the Russia-backed Syrian regime airstrikes martyred many Turkish soldiers.¹⁷ This possibility could only be averted by a cease-fire agreement brokered by President Erdoğan and Putin in Moscow in March. The precarious cease-fire has held so far despite several violations by the regime.¹⁸ On the other hand, towards the end of the year, the Turkish Armed Forces (TAF) started to relocate their observation posts and bases, which had previously fallen under the siege of regime forces.¹⁹ Observation posts and bases were withdrawn into inner Idlib to make them much more defensible in case of a Russia-backed regime assault on Idlib, which indicates that such a threat was deemed imminent by Turkey.

In Libya, Russia continued its military support to renegade general Khalifa Haftar's long-standing attack against Tripoli through Wagner mercenaries until June, at which time Haftar's attack was repulsed. Since Turkey, conversely, provided military support to the Government of National Accord (GNA) in Tripoli, Turkey and Russia engaged in an active proxy war for about seven months. In this proxy war, thanks to Bayraktar TB2 UCAVs provided by Turkey, the GNA destroyed more than a dozen Russian-made Pantsir air defense systems and a Krasukha electronic warfare system given to Haftar's forces.²⁰ Also due to the mounting pressure caused by the UCAVs and the bolstered GNA forces, Wagner mercenaries had to leave their front lines in Tripoli and were provided a safe passage, which is suspected to have been a result of a back-door Turkish-Russian agreement.²¹ In return, Russia entrenched its Wagner mercenaries in central Libya along the Sirte-Jufra line and deployed MIG-29 and Su-24 warplanes there. The latter constituted the main deterrence against

17 "33 Turkish Soldiers Martyred in Regime Airstrike in Idlib, Syria", Anadolu Agency, February 28, 2020, <https://www.aa.com.tr/en/turkey/33-turkish-soldiers-martyred-in-regime-airstrike-in-idlib-syria/1747513> (accessed on December 12, 2020).

18 "Turkey Says Idlib Ceasefire Details Largely Agreed on with Russia", Al-Jazeera, March 12, 2020, <https://www.aljazeera.com/news/2020/3/12/turkey-says-idlib-ceasefire-details-largely-agreed-on-with-russia> (accessed on December 12, 2020).

19 Ragıp Soylu and Levent Kemal, "Turkey to Abandon More military Positions in Syria's Idlib to 'Eliminate Risks'", Middle East Eye, December 10, 2020, <https://www.middleeasteye.net/news/turkey-syria-idlib-withdraw-more-military-positions> (accessed on December 12, 2020).

20 Enes Canli, "Libya: Army Hits Haftar's Air Defense System, Drone", Anadolu Agency, May 17, 2020, <https://www.aa.com.tr/en/africa/libya-army-hits-haftars-air-defense-system-drone/1843701> (accessed on December 10, 2020).

21 "Hundreds More Russian Mercenaries Flee Western Libya: GNA Forces", Al-Jazeera, May 25, 2020, <https://www.aljazeera.com/news/2020/5/25/hundreds-more-russian-mercenaries-flee-western-libya-gna-forces> (accessed on December 10, 2020).

the Turkey-backed GNA military advancement from central to Eastern Libya, and eventually blocked it.²²

In Nagorno-Karabakh, again, Turkey and Russia faced each other in the Nagorno-Karabakh War between late September and early November, in which Turkey supported Azerbaijan with military advisors and *Bayraktar TB2* UCAVs, whereas Russia supplied Armenia with weaponry and mercenaries.²³ Turkey managed to increase its influence in the South Caucasus vis-à-vis Russia, and Russia aimed to contain Turkey's influence by determining the terms of the cease-fire between Azerbaijan and Armenia, excluding Turkey from the peacekeeping mission.²⁴ Russia also attempted to block Turkey's involvement in the cease-fire monitoring mission on Azerbaijan's soil but could not succeed.

DYNAMICS OF TURKEY-RUSSIA RELATIONS

Turkey-Russia relations contain various dynamics within themselves ranging, among others, from the significant interdependence between Turkey and Russia, the geopolitical struggle with each other, and their rarely convergent threat perceptions.

Interdependence

Turkey-Russia relations are highly interdependent due to the varying degrees of dependency of each country on the other. Energy is the most conspicuous area of interdependence, as Turkey has been buying great amounts of oil and gas from Russia for years. So much so that until 2019, Turkey was the second-biggest importer of Russian gas after Germany.²⁵ Furthermore, Turkey and Russia are engaged in a long-term nuclear energy project, which will result in Turkey's first-ever nuclear power plant (NPP) on Turkish soil. Apart from energy, Turkey and Russia have strong economic relations in terms of trade, tourism, and investments.²⁶ Bilateral ties in both energy

22 Vakkas Dogantekin, "Russia Deployed Fighter Aircraft to Libya: US Africom", Anadolu Agency, May 26, 2020, <https://www.aa.com.tr/en/africa/russia-deployed-fighter-aircraft-to-libya-us-africom/1853936> (accessed on December 10, 2020).

23 Ahmet Gürhan Kartal, "'Turkey Has Won the War' in Karabakh Conflict: UK Daily", Anadolu Agency, November 11, 2020, <https://www.aa.com.tr/en/azerbaijan-front-line/turkey-has-won-the-war-in-karabakh-conflict-uk-daily/2039808> (accessed on December 10, 2020).

24 "Armenia, Azerbaijan and Russia Sign Nagorno-Karabakh Peace Deal", BBC, November 10, 2020, <https://www.bbc.com/news/world-europe-54882564#:~:text=Armenia%2C%20Azerbaijan%20and%20Russia%20have,disputed%20enclave%20of%20Nagorno%2DKarabakh.&text=A%20Russian%2Dbrokered%20truce%20was,there%20was%20no%20peace%20deal> (accessed on December 10, 2020).

25 Nuran Erkul Kaya, "Turkey's Gas Imports from Russia and Iran Fall Sharply", Anadolu Agency, August 24, 2020, <https://www.aa.com.tr/en/economy/turkey-s-gas-imports-from-russia-and-iran-fall-sharply/1951397>.

26 Hatice Ozdemir Tosun, "Turkish Official: Trade with Russia Should Reach \$100B", Anadolu Agency, July 26, 2020, <https://www.aa.com.tr/en/economy/turkish-official-trade-with-russia-should-reach-100b/1542364>.

and economy combine to constitute a high level of interdependence to the extent that Turkey and Russia cannot risk damaging their bilateral relations even when they engage in fierce geopolitical competition and struggle elsewhere.

Geopolitical Competition and Struggle

Geopolitical competition and even struggle are also an integral part of Turkey-Russia relations. Both countries are engaged in three active conflicts on opposite camps, namely Syria, Libya, and Nagorno-Karabakh. In addition to these three “hot” or “active” conflicts, Turkey and Russia are potentially at odds with each other in many other theaters and would compete for influence even in the absence of a conflict in these locations – examples include Crimea and the Black Sea, Central Asia, Balkans, the Middle East, and so forth. Since the annexation of Crimea by Russia was a serious geopolitical loss for Turkey, the latter has not and will not recognize the peninsula as Russia’s.²⁷ Simultaneously with the annexation of Crimea, Russia’s expansion of its Black Sea Fleet to the extent that it outpowers Turkish naval power in the Black Sea, pushes Turkey to seek greater NATO presence and counterbalance Russian naval power there.²⁸

Central Asia is another space where Russia has always been skeptical of Turkey’s influence and has dedicated its whole strategy for over a century to precluding a strong connection between Turkey and the Turkic republics. Examples of the geopolitical clash between Turkey and Russia such as the above abound; in fact, it is hard to find an area where the pair are not natural geopolitical rivals.

Intermittent Convergence on Threat Perception

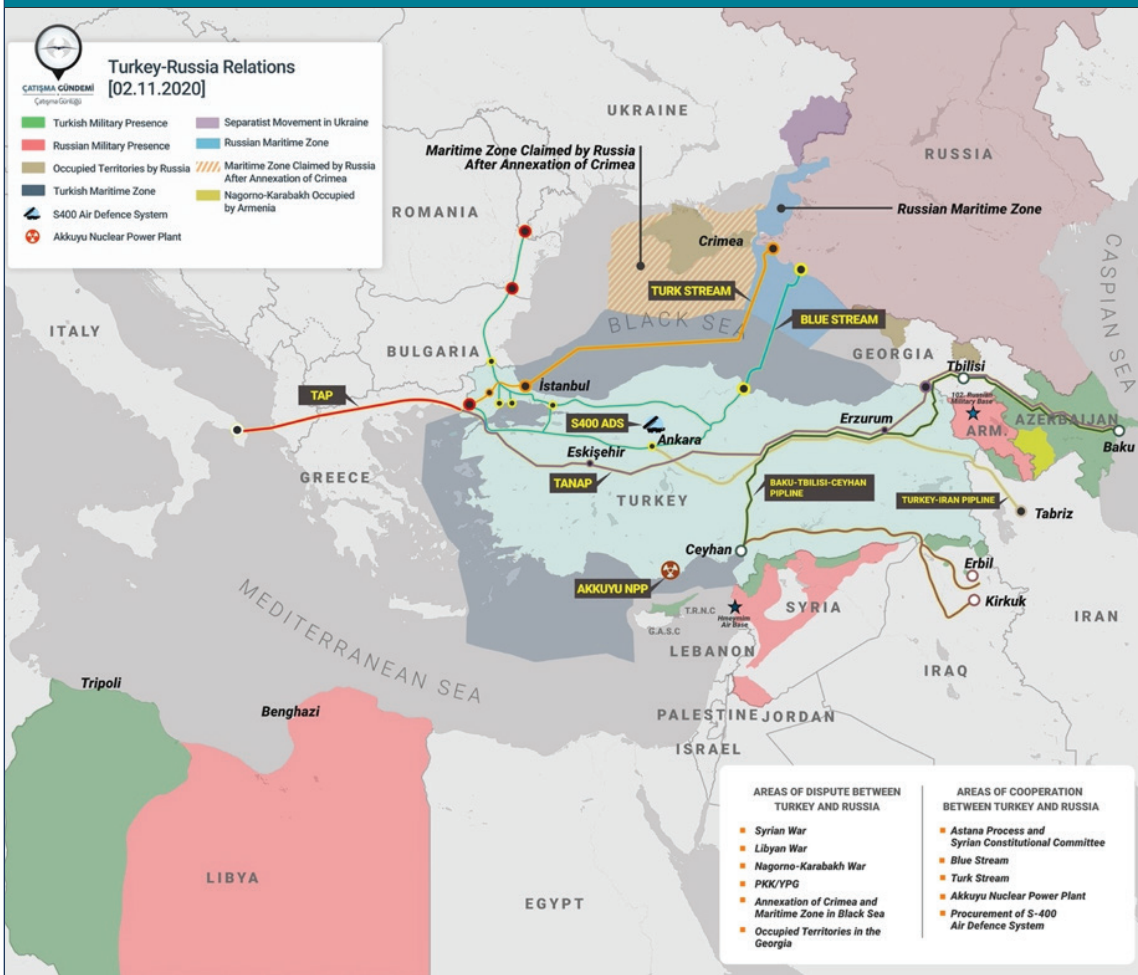
Turkey and Russia very rarely find themselves on the same side when it comes to the perception of threat. They sometimes converge on their respective threat perceptions and identification of the source of the threat. However, this does not necessarily bring about cooperation between the two. For instance, both Turkey and Russia are highly skeptical of mass protests, which are openly supported by the West, since both view them as attempts to undermine the rule in their countries, to force them into certain concessions, or even topple the governments altogether. While Russia went through this process during the “colored revolutions” in its “backyard,” Turkey experienced this at the Gezi Park protests in the summer of 2013. Nevertheless, this convergence on the perception of threat and its source did not yield solidarity be-

27 Faruk Zorlu and Gözde Bayar, “Turkey Repeats No Recognition of Annexation of Crimea”, Anadolu Agency, February 3, 2020, <https://www.aa.com.tr/en/europe/turkey-repeats-no-recognition-of-annexation-of-crimea/1723134>.

28 Joshua Kucera, “Erdogan, In Plea to NATO, Says Black Sea Has Become ‘Russian Lake’”, *Eurasia net*, May 12, 2016, <https://eurasianet.org/erdogan-plea-nato-says-black-sea-has-become-russian-lake> (accessed on December 15, 2020).

tween the two governments against mass political mobilizations. On the other hand, when the Gülenist coup attempt on July 15, 2016, hit Turkey, Russia was the first country to denounce it and immediately declared solidarity with the Turkish government. Whereas the coup attempt was an obvious threat for Turkey, Russia shared this threat perception in some way for its own interests: if the coup attempt had succeeded, the prospective rule would be a complete pawn of the West and would strive to undermine existing ties between Turkey and Russia. This convergence only appears during times of crisis and in the face of a common, fundamental threat. In this case, the convergence arguably resulted in the post-coup attempt rapprochement between Turkey and Russia in the forms of the sale of the S-400 air defense system, the launch of the TurkStream natural gas pipeline, and the Astana framework for Syria.

FIGURE 4: MAPPING TURKEY-RUSSIA RELATIONS



Source: Çatışma Gündemi [Conflict Agenda] November 02, 2020

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2021?

Interdependence

Since there is awareness on the part of Turkey that it is disproportionately dependent on Russia for natural gas imports, the former will try to decrease this overdependence on Russian gas in 2021. Turkey had already contracted the share of Russian gas in its total gas imports in 2019 by differentiating its sources, increasing the share of other suppliers such as Azerbaijan, Algeria, Nigeria, U.S., and Qatar, and tapping spot markets for cheaper gas. This trend will continue in 2021 especially under the recent agreement between Turkey and Azerbaijan to construct a new pipeline for the export of Azerbaijani gas to Turkey. Other aspects of interdependence such as trade, investments, and the construction of Akkuyu NPP will continue unhindered in 2021.

Defense cooperation between Turkey and Russia in 2021 will be contingent on the severity of the CAATSA sanctions imposed on Turkey by the United States. In theory, current CAATSA sanctions prevent a huge chunk of Turkish defense imports from the U.S., but, in practice, it is still possible to find a way to continue importations. If the Turkey-U.S. relations deteriorate further under the light of the CAATSA sanctions, Turkey will seek greater cooperation with the Russian defense sector and attempt to procure the needed components from Russia for the maintenance of its own defense industry.

Geopolitical Competition and Struggle

The current geopolitical competition between Turkey and Russia will continue in 2021 since this aspect of the relations is the most structural and long-term one. Russia will back a renewed regime attack on Idlib with an aim of capturing the province in 2021. Under Biden's presidency, the U.S. will be more supportive of the YPG in northeast Syria and subsequently fuel tension between Turkey and the U.S. Russia knows that the U.S. will not come to Turkey's help in the face of a Russia-backed regime attack on Idlib, not least because Idlib and western Syria, in general, are not of primary interest to the U.S. Hence, this will encourage Russia to initiate such an attack and deepen its geopolitical struggle with Turkey. In Libya, the collapse of the current Libyan Political Dialogue Forum (LPDF) under the auspices of the United Nations Support Mission in Libya (UNSMIL) is also likely, which would trigger another round of conflict between the two camps. In this case, Turkey and Russia will again actively engage in a struggle with each other through their proxies.

Intermittent Convergence on Threat Perception

Under the Biden presidency, the U.S. will likely simultaneously put pressure on both Turkey and Russia for different reasons. This dynamic might push both Turkey and Russia into the same corner. It will not, however, necessitate cooperation or solidarity between them against the U.S. pressure. As Biden is known to be quite favorable to Greek claims in the Eastern Mediterranean, he is likely to alienate Turkey further there and support the EastMed project. This, in return, might trigger Turkish-Russian cooperation in the Eastern Mediterranean since the project would undermine Russia's energy card vis-à-vis Europe - it is doubtful, though, that this will happen as early as 2021.

PROSPECTS OF TURKEY-RUSSIA RELATIONS IN 2021			
ISSUE	RUSSIA	TURKEY	POTENTIAL OUTCOME
Idlib	A renewed attack	Resistance	New demarcation line along M4
YPG-Russia	Lesser influence over YPG	Demanding the evacuation of Tall Rifat	Maintenance of current status quo
Nagorno-Karabakh	Maintenance of new status quo	Consolidation of monitoring position	Calm with minor frictions
Libya	Ensuring military presence	Ensuring political relevance	Both face exclusion attempt
Energy	Larger amount of oil export	Less dependence on Russian gas	Maintenance of interdependence

Source: Compiled by the authors

SYRIA: A VAGUE FUTURE

SUMMARY OF 2020

- Turkey and Russia agreed to a cease-fire in Idlib after the launch of Operation Spring Shield by Turkey in response to the Assad regime's assault on the province.
- The Assad regime has to deal with an economic crisis, as well as attacks by DAESH and the insurgency in Deraa.
- The YPG increasingly employs terror tactics and specifically car bomb attacks in the areas held by the Syrian opposition.

The events of 2020 in Syria can be divided in the pre-ceasefire period before March 5 and the post-ceasefire period since then. While the first period was dominated by the fighting in Idlib, the humanitarian catastrophe, mass migration, and the Turkish Operation Spring Shield, the second has seen relative calm in terms of military conflict. The second period has been dominated by diplomatic negotiations over the UN aid into Syria, the implementation of the Idlib agreement, economic difficulties, terror attacks by DAESH and the YPG, as well as the ongoing insurgency in Deraa.

In the first period, the Assad regime's offensive on Idlib supported by the Russian military gained momentum. The Syrian opposition in Idlib was seemingly unable to withstand the massive assault and lost vast territories to the Assad regime. In the meantime, several Turkish observation points in Idlib were surrounded by the Assad regime.

The turn of events happened on February 27, 2020. At least 34 Turkish soldiers were martyred as a result of an airstrike by the Assad regime.²⁹ Thus, Turkey launched Operation Spring Shield and wreaked havoc on the regime forces. According to the Turkish Ministry of Defense, the Assad regime lost 3 warplanes, 3 unmanned aerial vehicles (UAVs), 8 helicopters, 8 air-defense systems, 99 artillery/howitzer/multibarrel rocket launchers, 151 tanks, 16 anti-tank guided missiles, 80 armored vehicles, 10 ammunition depots; a chemical weapon facility was destroyed; and 3,138 regime militia members.³⁰ This military action by Turkey prompted Russia to agree to a cease-fire. As a result of the agreement, 270,000 of the 948,000 internally displaced persons (IDPs), who were victims of the recent regime offensive, returned home.³¹

In the second period, the implementation of the Idlib agreement was fully implemented but later canceled due to the attacks of radical groups in Idlib. Moreover, the humanitarian disaster was followed by the Russian blockade of UN aid into Syria via the border crossings of Bab al-Hawa and Bab al-Salamah. After several rounds of negotiations, Russia agreed to leave the Bab al-Hawa crossing open, while closing down the Bab al-Salamah crossing.³² On the other side of the conflict, the mismanagement of economy and clientelism coupled with the U.S. sanctions on the regime and the economic crisis in Lebanon led to the devastation of the Syrian economy and the collapse of the Syrian pound.³³

29 Eric Knecht, "At Least 34 Turkish Soldiers Killed in Air Strikes in Syria's Idlib: Syrian Observatory", Reuters, February 28, 2020, <https://www.reuters.com/article/us-syria-security-toll/at-least-34-turkish-soldiers-killed-in-air-strikes-in-syrias-idlib-syrian-observatory-idUSKCN20L32S> (accessed on December 21, 2020).

30 "Bahar Kalkanı Harekatı Son Durum 5 Mart! Kaç Rejim Unsuru Etkisiz Hale Getirildi?", *Haber 7*, March 5, 2020, <https://www.haber7.com/guncel/haber/2948647-bahar-kalkani-harekatı-son-durum-5-mart-kac-rejim-unsuru-etkisiz-hale-getirildi> (accessed on December 21, 2020).

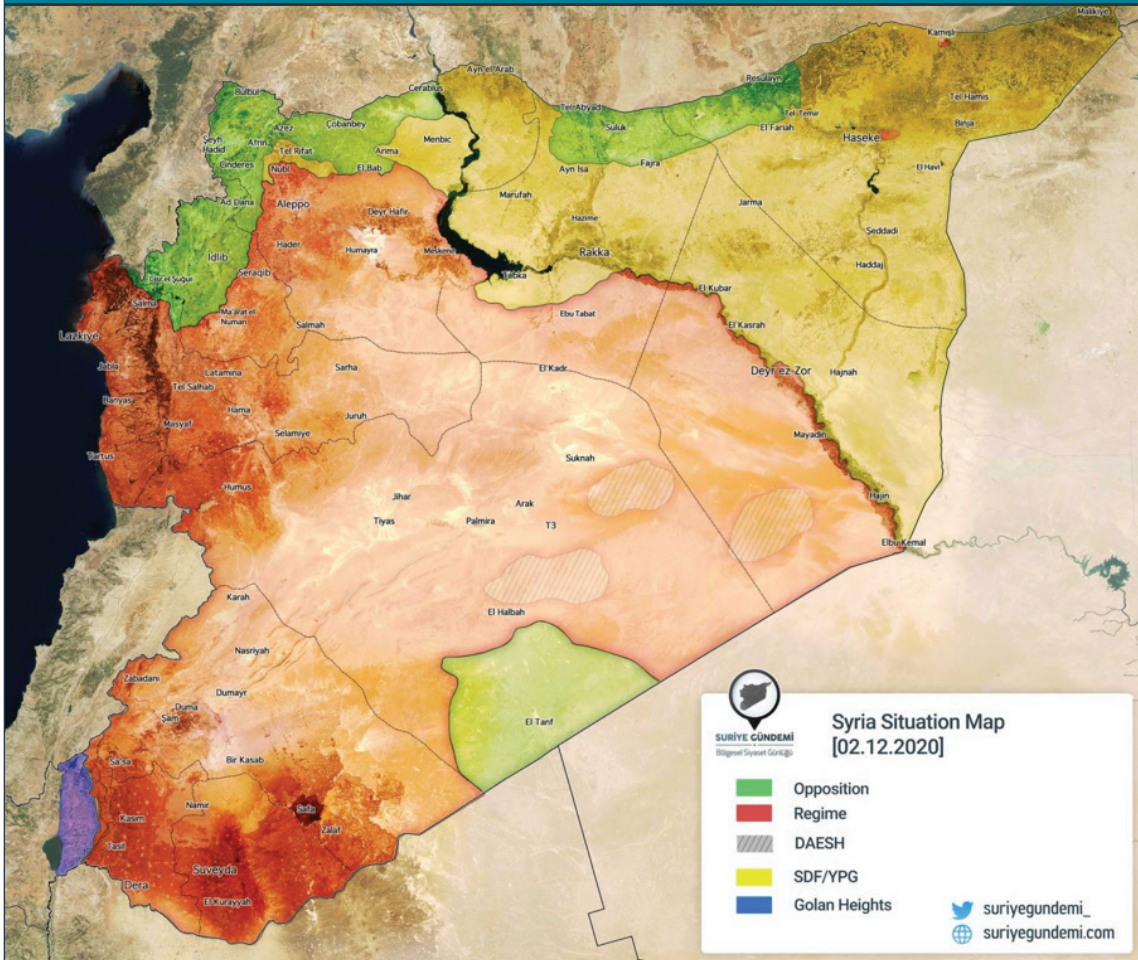
31 "Hundreds of Thousands of IDPs Return to Aleppo and Idlib Since Ceasefire", *North Press Agency*, May 15, 2020, https://npasyria.com/en/blog.php?id_blog=2550&sub_blog=12&name_blog=Hundreds%20of%20thousands%20of%20IDPs%20return%20to%20Aleppo%20and%20Idlib%20since%20ceasefire (accessed on December 21, 2020).

32 "Syria: Russia and China Veto Last-Ditch Aid Extension Deal", BBC News, July 10, 2020, <https://www.bbc.com/news/world-middle-east-53370890#:~:text=Russia%20and%20China%20have%20vetoed,north%2Dwestern%20Syria%20via%20Turkey.&text=A%20Belgian%20German%20draft%20resolution,which%20expires%20later%20on%20Friday>. (accessed on December 21, 2020).

33 "Syrian Pound Hits Record Low Ahead of New U.S. Sanctions: Dealers", Reuters, June 9, 2020, <https://www.reuters.com/article/us-syria-economy-currency-idUSKBN23F2YL> (accessed on December 21, 2020).

Furthermore, the Assad regime faced a non-ending insurgency in Deraa.³⁴ DAESH terror cells in the desert of Syria used guerilla tactics and conducted hundreds of attacks. Despite Russian and Iranian aid, DAESH attacks continued and even increased with the ongoing release of DAESH prisoners and their families from the prisons and the IDP camps by the YPG terror group.³⁵ Since March 5, terror tactics reached an all-time high with more than 50 car bomb attacks by the YPG.³⁶

FIGURE 5: SYRIA SITUATION MAP



Source: Suriye Gündemi, December 12, 2020

34 Abdullah Al-Jabassini, "Rampant Violence, Military Escalation, and the Role of Intermediaries in Daraa, Syria", *Middle East Institute*, June 1, 2020, <https://www.mei.edu/publications/rampant-violence-military-escalation-and-role-intermediaries-daraa-syria> (accessed on December 21, 2020).

35 Kayla Koontz and Gregory Waters, "Between the Coalition, ISIS, and Assad: Courting the Tribes of Deir ez-Zor", *Middle East Institute*, November 3, 2020, <https://www.mei.edu/publications/between-coalition-isis-and-assad-courting-tribes-deir-ez-zor> (accessed on December 21, 2020).

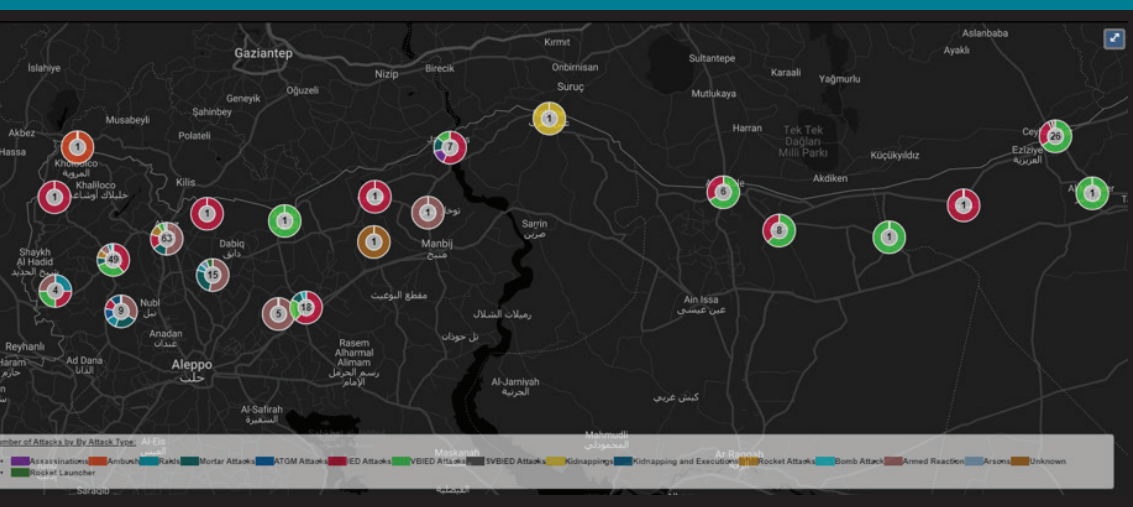
36 Terrorism Analysis Platform Database.

DYNAMICS OF TURKEY'S SYRIAN STRATEGY

The YPG Threat

The YPG's increasing pursuit of car bomb attacks has increased the terror threat towards Turkey and Turkey's local allies. While the YPG has managed to circumvent the political costs of terror tactics, since March 5, the terror group has killed more civilians than the Assad regime or DAESH in Syria. Secondly, a new discourse is trying to legitimize the Syrian YPG/PKK cadres while blaming the non-Syrian PKK cadres for misfortunes like child recruitment and the Turkish animosity towards the YPG.³⁷ In line with this discourse, the YPG aims to legitimize itself by including the Kurdish National Council into its structure as a result of the current intra-Kurdish negotiations. Moreover, the YPG uses DAESH prisoners and their families as a tool to attract diplomatic recognition and exploit visits by foreign delegations to push forward its political agenda of an autonomous region. Together with other developments, the threat of a terror statelet south of Turkey's border remains alive.

FIGURE 6: MAP OF YPG'S TERRORIST ATTACKS IN NORTHERN SYRIA IN 2020



Source: Terrorism Analysis Platform (TAP), www.tap-data.com

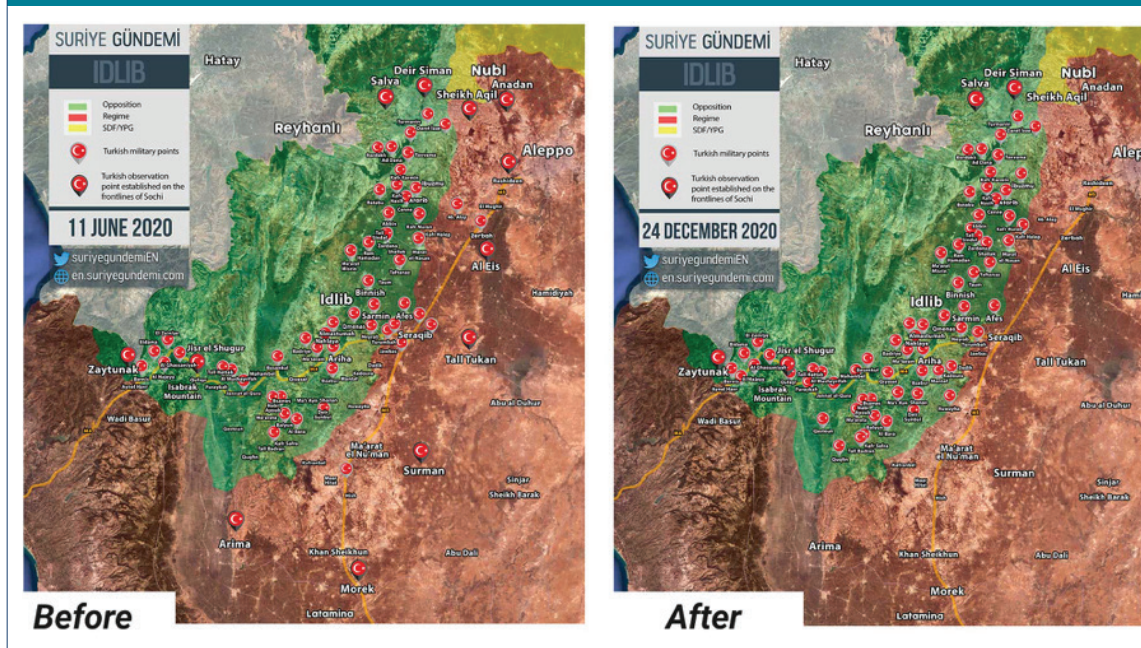
The Path to Stabilizing Idlib

Currently, the Turkish army is repositioning itself in Idlib. It is withdrawing its surrounded military points and strengthening its military presence across a line of de-

³⁷ Amberin Zaman and Dan Wilkofsky, "Child Recruitment Casts Shadow over Syrian Kurds' Push for Global Legitimacy", Al-Monitor, December 7, 2020, <https://www.al-monitor.com/pulse/originals/2020/12/syria-kurds-pkk-missing-youth-sdf-kobane-us-turkey-erdogan.html> (accessed on December 21, 2020).

fense behind the front line in Idlib. Thus, a military assault by the Assad regime is unlikely. Turkey managed to prevent a massive refugee mobilization from Idlib and is investing in the SNA to restructure the armed groups in the province. Turkey succeeded in preventing a political plot by Hayat Tahrir al-Sham (HTS) to divide the ranks of Ahrar al-Sham, the biggest component of the SNA in Idlib.³⁸ Moreover, the internal dynamics in Idlib changed as Turkey's policies resulted in the dissolving of Al-Qaeda-affiliated groups in Idlib; the fate of Hayat Tahrir al-Sham, however, remains unclear. While the group proved pragmatism, progress, and willingness to abide by international agreements, a permanent solution for the group and its leadership has yet to be found. Therefore, the future of Idlib will depend on Turkey's capabilities of restructuring armed groups in the province to make the current situation sustainable. With Al-Qaeda affiliates going underground, Idlib now has two instead of three blocks of armed groups: Hayat Tahrir al-Sham, its affiliated groups, and the Turkey-backed SNA.

FIGURE 7: COMPARISON OF TURKEY'S MILITARY OBSERVATION POINTS IN IDLIB



Source: Suriye Gündemi

38 Ömer Özkizilcik, "The military wing of Ahrar al-Sham headed by Abu Al Mundhir has published an ultimatum demanding the appointment of Hasan Soufan as the leader instead of Abu Jaber Pasha. Hasan Soufan was the leader of Ahrar before but left the group due to differences.", Twitter, October 20, 2020, <https://twitter.com/OmerOzkizilcik/status/1318506524877103105> (accessed on December 21, 2020).

THE U.S.: NEW ADMINISTRATION, NEW POLICIES?

Although Syria is not expected to be a high priority on Biden's agenda, a new approach by the Washington administration to the war-fatigued country may affect the lives of millions. The U.S. has maintained a policy with five overarching goals: defeating DAESH and supporting the YPG-dominated Syrian Democratic Forces as the U.S. local partner in Syria; preserving U.S. presence at Al-Tanf to block the mainland route of Iran from Tehran to Damascus; supporting Turkey by diplomatic means to ensure relative calm in Idlib; denying access for the Assad regime to crucial economic tools and increasing pressure by means of economic sanctions; and, lastly, preventing other states and regional actors from renormalizing relations with the Assad regime. With this, the U.S. aims to enforce a political process to resolve the Syrian conflict.³⁹ A possible change in the U.S. policies towards Syria may turn the table and change the balance of power in the war-torn country. Therefore, a significant change in the U.S. policy towards Syria is a potentially important dynamic for Turkey's Syria strategy.

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2021?

YPG as a "Target"

In 2021, the YPG will be forced to balance between several different aspects. On the one hand, the YPG will try to maintain U.S. support, while on the other, it will try to maintain Russian protection. The YPG will try to make progress in the intra-Kurdish negotiations while the PKK and the Kurdish Regional Government are on the verge of a conflict.⁴⁰ Moreover, the YPG will continue its push for legitimacy and try to rebrand itself again by stressing the false differentiation between the Syrian and non-Syrian PKK cadres. It will continue to use terror tactics that will ultimately undermine its pursuit of legitimacy and prove its real nature as a terror group. The YPG's political goal of a terror corridor from Iraq to the Mediterranean will push the group further into attacking the areas controlled by the Syrian National Army (SNA). This last development might make the YPG a target for Turkey, again. While Turkey might engage in more airstrikes to retaliate, it's possible that a joint Syrian-Turkish (SNA-TAF) military operation against the YPG might take place. Likely targets of these operations are Tell Rifaat, Manbij, Ayn al-Arab, and Ayn Issa.

39 Ömer Özkizilcik, "What Biden's Syria Policy Might Look Like", TRT World, November 24, 2020, <https://www.trtworld.com/opinion/what-biden-s-syria-policy-might-look-like-41758> (accessed on December 21, 2020).

40 Shelly Kittleson, "Iraqi Kurds Turn against the PKK", Foreign Policy, November 29, 2020, <https://foreignpolicy.com/2020/11/29/iraqi-kurds-turn-against-the-pkk/> (accessed on December 21, 2020).

A Fragile Balance in Idlib

An unsatisfying situation for Russia in Idlib and the lack of implementation of the Idlib agreement will push Russia to pressure Turkey in Idlib. At the moment, the complex Turkish-Russian brinkmanship, as well as the might of the Turkish army, are hindering a new escalation in Idlib. The year 2021 will be important in terms of the transformations of the internal landscape of Idlib. After eradicating armed groups that are more radical than Hayat Tahrir al-Sham (HTS), Turkey can work more efficiently on finding a lasting solution for the HTS. While radicals in the HTS split from the group and disbanded, the dogmatic members left in HTS have become weaker against the group's pragmatists. Playing on this dynamic, Turkey has the opportunity to empower the legitimate armed Syrian opposition in Idlib. However, this opportunity may be lost in the case of new military escalation in the province. In this manner, while the implementation of the Idlib agreement and the resolution of radical groups in Idlib might help Turkey's cause, it will be the Turkish-Russian relations and the might of the Turkish army that will ensure the safety of the over 3 million civilians in Idlib.

Realignment between Turkey and the U.S.

While the Biden administration, as well as U.S. bureaucrats, seem willing to continue on the current course in Syria, there seems to be a relatively low appetite to do more, and a general assumption that less is not an option. However, different options will be open to the Biden administration. If Biden pushes for an international legitimization of the YPG-dominated governance structure in Syria, Turkey, and the Syrian opposition might be provoked to take matters into their own hands with a new military operation. Furthermore, Turkey may step up its dialog with Russia. However, if the new administration opts for the containment of Iran, balancing Russia, and preventing the Assad regime from gaining legitimacy, a new *modus operandi* with Turkey might materialize. The U.S. could re-engage with the legitimate Syrian opposition that is stronger and better organized than ever before. In that case, the U.S. will have to find new ways of addressing Turkey's concerns regarding the YPG. It should be noted that only if the U.S. is ready to cut all ties with the YPG, a realignment between the NATO partners in Syria can occur.

EASTERN MEDITERRANEAN: THE CHANGING DYNAMICS OF STRATEGIC COMPETITION

SUMMARY OF 2020

- The Eastern Mediterranean states which do not have any political dispute over the already discovered energy fields started to drill and extract gas.
- The political efforts to prevent a regional conflict have been inefficient in addressing the energy politics and security concerns of all parties.

The developments in 2020 can be classified under three categories that enable a general assessment of the past year and the projection of probable implications in the coming term. These are energy-related activities, political efforts, and military escalations. This section will cover these three categories in order to obtain a picture of the undertakings in the Eastern Mediterranean. Insight into the course of the events will be provided by reviewing the headlines of news agencies.

ENERGY-RELATED DEVELOPMENTS

The energy investments and extraction efforts in the Eastern Mediterranean should be scrutinized according to the countries in the region. In this sense, the countries

may be divided into two camps: the ones already extracting natural resources and the ones still struggling and in search of benefits. For instance, Israel and Egypt have started marketing the resources towards internal consumption or by paving the course to transfer the resources to the markets. In this context, the gas reserve estimates increased the potential energy business in the region, as seen specifically in the announcement by Energean for Israel's Karish field⁴¹ and by ENI for the Egyptian maritime zone.⁴² The U.S. energy giant Chevron assumed a role in the energy drilling and extraction in the Israeli territorial waters by purchasing the rights of Nobel Energy for \$5 billion.⁴³ Like Israel, Egypt developed a business model for energy with a total of 15 gas wells at the Zohr Field⁴⁴ and attracting French companies to invest.⁴⁵ Meanwhile, Egypt's cabinet approved 12 oil and gas exploration deals in 2020.⁴⁶ The UAE has also joined the energy-related developments by means of these two states in the region, mainly favoring business with Israel.⁴⁷

The other countries are not fortunate like Israel and, to some extent, Egypt. Lebanon is still struggling to reach vast resources while the long-lasting dispute continues to delimit the maritime zone with Israel.⁴⁸ Furthermore, Israel approved gas exploration in an area that is disputed with Lebanon⁴⁹ - a development that may escalate tension. As Lebanon is wrestling with Israel, Palestine's maritime rights are identified as a triangle that closes upon itself from the north and south flanks and

41 "Energean Ups Gas Estimates in Its Israeli Karish North Field", Reuters, April 9, 2020, <https://fr.reuters.com/article/energean-resources/energean-ups-gas-estimates-in-its-israeli-karish-north-field-idUKL5N2BX1J6>, (accessed on December 12, 2020).

42 Andreas Exarheas, "Eni Makes New Gas Discovery Offshore Egypt", Rigzone, July 1, 2020, https://www.rigzone.com/news/eni_makes_new_gas_discovery_offshore_egypt-01-jul-2020-162597-article/, (accessed on December 12, 2020).

43 Shoshanna Solomon, "Chevron's \$5b Noble Energy Buy Brings a New Owner to Israel Natural Gas Fields", Times of Israel, July 20, 2020, <https://www.timesofisrael.com/chevrons-5b-noble-energy-buy-brings-a-new-owner-to-israel-natural-gas-fields/>, (accessed on December 12, 2020).

44 "Egypt's Petroleum Ministry Says 15 Gas Wells Operative at Zohr Field", *Egypt Today*, September 7, 2020, <https://www.egypttoday.com/Article/3/91703/Egypt-s-Petroleum-Ministry-says-15-gas-wells-operative-at>, (accessed on December 12, 2020).

45 "French Companies Consider Investing in Egypt's Gas and Oil Sector", *Egypt Independent*, September 12, 2020, <https://egyptindependent.com/french-companies-consider-investing-in-egypts-gas-and-oil-sector/>, (accessed on December 12, 2020).

46 Mubasher, "Egypt's Cabinet Approves 12 Oil, Gas Exploration Deals", June 11, 2020, <https://english.mubasher.info/news/3652198/Egypt-s-cabinet-approves-12-oil-gas-exploration-deals/>, (accessed on December 12, 2020).

47 "Israel-UAE Deal Includes Energy Cooperation", *Energy Intelligence*, August 14, 2020, http://www.energyintel.com/pages/eig_article.aspx?DocID=1081445, (accessed on December 12, 2020).

48 Temour Azhari, "Lebanon's First Offshore Gas Drill Is a Huge Disappointment", April 27, 2020, <https://www.aljazeera.com/economy/2020/4/27/lebanons-first-offshore-gas-drill-is-a-huge-disappointment>, Al Jazeera, (accessed on December 12, 2020).

49 Rina Bassist, "Israel Approves Exploration, Bidding on Disputed Offshore Field", Al-Monitor, July 6, 2020, <https://www.al-monitor.com/pulse/originals/2020/07/israel-lebanon-hezbollah-ehud-barak-benny-gantz-oil-gas.html>, (accessed on December 12, 2020).

only serves to highlight the unfair share of Israel and Egypt at the expense of the Palestinian rights. On the other hand, even Palestine's current maritime zone cannot be utilized by the Palestinians in an energy deal without the permission of Israel and Egypt. Palestine is entrapped as a result of the isolation imposed on it by Israel and Egypt⁵⁰ and ultimately led to it signing a maritime exclusive economic zone deal with Turkey.⁵¹ This intention, for sure, may escalate the tension in the region.

Greek Cypriots are deeply concerned by the already escalating tension in the Eastern Mediterranean which led multinational energy companies to be hesitant in investing. Greece is more involved in military and political turbulences because it does not have a shore in the Eastern Mediterranean but is insistent on obtaining a privilege by claiming the rights of the tiny island Meis (*Kastellorizo*). Greece has also focused on its exclusive economic zone in the "Sea of Islands" (Aegean Sea)⁵² while Turkey continued to explore gas reserves in the Eastern Mediterranean and the Black Sea despite the pandemic.⁵³

There are three different streams in energy-affiliated undertakings. The first indicates energy deals and improving the energy market if not disturbed by political and military grievances. Israel and Egypt's energy programs appear to be deepening and widening with business deals, exploration pledges, and efforts for the extraction of natural resources off the coasts. The second group of states experiences problems in addressing a compromise. In this sense, Greeks and Greek Cypriots are so heavily involved in competing with Turkey that energy-related activities are limited in terms of efficient operability. On the other hand, Greece is not geographically situated to reach the Eastern Mediterranean although it intensifies efforts to reach the potential seabed to explore and drill. The geo-position of Greece indicates that the Eastern Mediterranean issue is a political problem rather than an issue of reaching energy resources since they have not identified a gas reserve as of yet. The third group of states is disadvantaged as they have disputes either with Israel or Greece. In this context,

50 Ahmed Abu Amer, "Egypt to Negotiate Sea Border with Palestine", *Al-Monitor*, November 4, 2020, <https://www.al-monitor.com/pulse/originals/2020/11/palestine-egypt-negotiations-maritime-border-demarcation.html>, (accessed on December 12, 2020).

51 Ragıp Soylu, "Palestinian Authority 'Ready to Sign Maritime Exclusive Economic Zone Deal with Turkey'", *The Middle East Eye*, June 22, 2020, <https://www.middleeasteye.net/news/palestine-turkey-maritime-deal-east-mediterranean>, (accessed on December 12, 2020).

52 "Energean to Deploy ODYSSEA Platform on Its Gas Production Platform in Greece", *CORDIS*, <https://cordis.europa.eu/article/id/415919-energean-to-deploy-odyssea-platform-on-its-gas-production-platform-in-greece>, (accessed on December 12, 2020).

53 "Turkey Intensifies Eastern Mediterranean Drilling Despite Pandemic", *Daily Sabah with Anadolu Agency*, May 4, 2020, <https://www.dailysabah.com/business/energy/turkey-intensifies-eastern-mediterranean-drilling-despite-pandemic>, (accessed on December 12, 2020).

Lebanon has disputes with Israel⁵⁴ while Palestine is denied reaching and benefitting from natural resources. Consequently, energy developments indicate that Israel and Egypt are realizing their energy programs while the Greek Cypriots are still lacking due to the domination of political disagreements.

Energy-related disputes pushed the region's advantaged states to establish the EastMed Gas Forum in the region to promote gas exports.⁵⁵ This move indicates two different motivations. The first is to calm the tension among the regional states since Israel, Egypt, Greek Cypriots, and Greece have already reached an agreement for a privileged share. On the other hand, Lebanon and Palestine are credited as members of this forum to align them politically with the already established energy policies of the privileged states. The second reason is Turkey in so far as the EastMed Gas Forum will shape the policies of regional actors at the expense of Turkish demands although it seems to be a misleading move to escalate tension more.⁵⁶

The final stage in the development of the energy market is to build a pipeline and transfer the resources to the international markets. The options for constructing a pipeline are many; regional actors promoted a pipeline that goes to Cyprus, and passes Crete and Greece towards Italy.⁵⁷ Israel,⁵⁸ Egypt, Greece,⁵⁹ and Greek Cypriots⁶⁰ advanced the legal procedures to facilitate international funding worth 7 billion euros. In the meantime, individual states started projects to lay pipelines towards their mainland; Greek efforts focused on finding a partner in Italy⁶¹ and Energean built the main Israeli gas pipeline.⁶²

54 "Israel-Lebanon Sea Border Talks Postponed", Al-Monitor, November 30, 2020, <https://www.al-monitor.com/pulse/originals/2020/11/israel-lebanon-sea-border-maritime-talks-postponed.html>, (accessed on December 12, 2020).

55 "Mideast Energy Forum Takes Shape to Promote Gas Exports", Reuters, September 21, 2020, <https://www.reuters.com/article/mideast-energy-int-idUSKCN26C1W1>, (accessed on December 12, 2020).

56 Sue Serkes, "Mistake to Leave Turkey out of New East Med Gas Club – International Expert", Times of Israel, September 28, 2020, <https://www.timesofisrael.com/mistake-to-leave-turkey-out-of-new-east-med-gas-club-international-expert/>, (accessed on December 12, 2020).

57 "Strong Commitment to Build East Med pipeline", *Financial Mirror*, June 17, 2020, <https://www.financialmirror.com/2020/06/17/strong-commitment-to-build-eastmed-pipeline/>, (accessed on December 12, 2020).

58 "Israel Approves Pipeline Deal to Sell Gas to Europe", Reuters, July 19, 2020, <https://uk.reuters.com/article/uk-israel-europe-natgas/israel-approves-pipeline-deal-to-sell-gas-to-europe-idUKKCN24K0FJ>, (accessed on December 12, 2020).

59 "EastMed Natural Gas Agreement Tabled in Greek Parliament for Ratification", Athens News Agency, May 5, 2020, https://www.thenationalherald.com/greece_economy/arthro/eastmed_natural_gas_agreement_tabled_in_greek_parliament_for_ratification-282830/, (accessed on December 12, 2020).

60 Mohammed Saeid, "Egypt, Cyprus Focus on Natural Gas Pipeline amid Tensions in Eastern Mediterranean", September 13, 2020, <https://www.al-monitor.com/pulse/originals/2020/09/egypt-cyprus-natural-gas-pipeline-east-mediterranean-turkey.html#ixzz6Y1wBL3yL>, (accessed on December 12, 2020).

61 "Greek-Italian JV Seeks Contractors for EastMed Gas Pipeline", *OFFSHORE Engineer*, May 4, 2020, <https://www.oedigital.com/news/478141-greek-italian-jv-seeks-contractors-for-eastmed-gas-pipeline>, (accessed on December 12, 2020).

62 Staurt Elliot, "UK-based Energean Completes Laying of Core Israeli Gas Pipeline", SP Global, June 22, 2020, <https://www.spglobal.com/platts/en/market-insights/latest-news/natural-gas/062220-uk-based-energean-completes-laying-of-core-israeli-gas-pipeline>, (accessed on December 12, 2020).

Political Efforts

The political aspect of the Eastern Mediterranean issues is more fluctuating and vulnerable to turning into a military confrontation. Turkey has become the core of the debates and concerns of the region's privileged states or the investing ones. This tendency has intensified the language used by the authorities, escalating the political tension and posing as a reminder of the probability of a military confrontation. For instance, in an embarrassing article in the *Financial Mirror*, the Greek Cypriot spokesman called Turkey a "pirate" disregarding the status quo of Turkish Cypriots in favor of Greek Cypriots.⁶³

The political stance of the EU and the U.S. has become more deterministic, as political tension escalates. The EU⁶⁴ and the U.S.⁶⁵ provided unconditional support to Greece and Greek Cypriots in their dispute with Turkey within the frame of solidarity. The attitude of the U.S. Ambassador to Athens Geoffrey Pyatt has become a multiplying factor in pushing the Greeks to escalate political tension. This, in turn, has impeded the reliability of the U.S. in the eyes of Turkey. The EU, on the other hand, worded and sounded a pro-Greek stance even though Germany, as the power engine of Europe, assumed the responsibility of mediation. The EU circulated announcements based on the solidarity of EU members, but the latest two summits were short of unity due to the varying interests of the member states. The general strategy of Greece is to encourage the EU and the U.S. to refer to the issue fields in question as a "EU/U.S. problem" rather than the Greek one, which has actually been achieved. Greece even sacrificed Greek interests in the Ionian Sea in favor of Italy in order to urge Italy to comply with the Greek demands and present a model in maritime zone disputes.⁶⁶ But the agreement pointed to a partial sovereign sea-land contrary to the Greek arguments for the "Sea of Islands."

Turkey's political discourse appeared to be addressing different political agendas. The initial issue was to establish bridges with Israel and Egypt despite soured rela-

63 Charlie Charalambous, "Pirates of the Eastern Mediterranean", *Financial Mirror*, January 26, 2020, <https://www.financialmirror.com/2020/01/26/pirates-of-the-eastern-mediterranean/>, (accessed on December 12, 2020).

64 Kostas Geropoulos, "EU Offers Cyprus Wavering Support over Turkish Drilling", *The National Herald*, April 29, 2020, https://www.thenationalherald.com/cyprus_politics/arthro/eu_offers_cyprus_wavering_support_over_turkish_drilling-270068/, (accessed on December 12, 2020).

65 "Geoffrey Pyatt: 'The Turkey-Libya Memorandum Cannot Take Anything away from Greece'", *Greek City Times*, June 11, 2020, <https://greekcitytimes.com/2020/06/11/geoffrey-pyatt-the-turkey-libya-memorandum-cannot-take-anything-away-from-greece/> (accessed on December 12, 2020).

66 "Greece, Italy Sign Accord on Maritime Zones in Ionian Sea", *Reuters*, June 9, 2020, <https://uk.reuters.com/article/uk-greece-italy-foreign/greece-italy-sign-accord-on-maritime-zones-in-ionian-sea-idUKKBN23G181> (accessed on December 12, 2020).

tions. Turkish Minister of Foreign Affairs Mevlüt Çavuşoğlu called Israel to annul the EEZ agreement with Greek Cypriots⁶⁷ while there were secret talks with Egypt, which sparked outrage in Greece.⁶⁸ The second track of the Turkish diplomacy was to focus on the EU's mediation and political preference. Turkey, in essence, has always called for a political settlement of disputes and has abided by the requests of the mediating parties. The withdrawal of the vessel *Fatih* for maintenance from the Eastern Mediterranean is a significant example of this tendency. Turkey's perception is based on legal rights that emanate from major treaties that have established the current status quo.⁶⁹ Hence Turkey appears to be determined to negotiate but not to make any concessions in the Eastern Mediterranean.⁷⁰ Meanwhile, there is pressure on Turkey as it refuses to de-escalate with Greece⁷¹ in so far as Greece escalates the political tension. The Greek attitude to delay the exploratory talks⁷² in order to identify exactly what to negotiate and to push NATO's role to a dead end so as to de-escalate the tension is more focused on how to respond to provocations by reciprocal political measures. In this sense, the EU, as the third leg of the Turkish strategy, has become the center of gravity. The Greek strategy was to push the EU to apply sanctions on Turkey while Turkey was countered by compromise-based calls for negotiations. In the end, Greece could not achieve what was desired by the EU's involvement since no sanctions were drafted.⁷³

Greek-Turkish tension is also present in the relations with Libya and Egypt in terms of the delimitation of maritime zones. Turkey and Libya surprised the international community by a mutual memorandum on delimiting the maritime

67 Evi Andreu, "Turkish FM Calls on Israel to Annul EEZ Agreement with Cyprus", *Cyprus Mail*, June 19, 2020, <https://cyprus-mail.com/2020/06/19/turkish-fm-calls-on-israel-to-annul-eez-agreement-with-cyprus/> (accessed on December 12, 2020).

68 "Secret Diplomatic Talks between Turkey, Greece Spark Outrage in Athens", *Daily Sabah*, July 16, 2020, <https://www.dailysabah.com/politics/diplomacy/secret-diplomatic-talks-between-turkey-greece-spark-outrage-in-athens> (accessed on December 12, 2020).

69 Ebru Sengul Cevrioglu, "Turkey's East Med. Energy Policy on Firm Legal Basis", *AA*, July 23, 2020, <https://www.aa.com.tr/en/turkey/turkeys-east-med-energy-policy-on-firm-legal-basis/1920055> (accessed on December 12, 2020).

70 "Erdoğan Warns Turkey Will 'Never Make Concessions' in Eastern Mediterranean", *Financial Times*, <https://www.ft.com/content/eb30aaa1-169f-4d2d-a84d-693e99a29145> (accessed on December 12, 2020).

71 Pal Antonopoulos, "International Pressure against Turkey Mounts as It Refuses to De-escalate with Greece", *Greek City Times*, July 22, 2020, <https://greekcitytimes.com/2020/06/22/international-pressure-against-turkey-mounts-as-it-refuses-to-de-escalate-with-greece/> (accessed on December 12, 2020).

72 "Greece Says No Date Yet on When Resuming Exploratory Talks with Turkey", *Reuters*, September 24, 2020, <https://www.reuters.com/article/us-greece-turkey-talks/greek-says-no-date-yet-on-when-exploratory-talks-with-turkey-will-start-idUSKCN26F1PT> (accessed on December 12, 2020).

73 Yannis Palaiologos, "Athens Not Satisfied with Draft Statement of EU Summit Leaders on Turkey", *EKathimerini*, December 10, 2020, <https://www.ekathimerini.com/260103/article/ekathimerini/news/athens-not-satisfied-with-draft-statement-of-eu-summit-leaders-on-turkey> (accessed on December 12, 2020).

zones across their coasts. This step precluded Greek access to Cyprus towards the alleged extension of sea-land based on Meis's claimed continental shelf. The legitimacy of the Turkish-Libya agreement and its registration by the UN legal counselor consolidated Turkish arguments. This move eventuated in two interrelated events: support to Haftar to fasten the attack on the GNA in order to invalidate the memorandum, and a quick memorandum with Egypt to delimit the maritime zone with concessions.

The other countries in the Eastern Mediterranean correlated Turkish-Greek disputes to their "Turkey" agendas. Egypt is more concerned about the security of the Sisi regime after the coup d'état, which perceives Turkey's critical attitude as a threat. In this sense, Sisi prioritized a regional bloc against Turkey.⁷⁴ Israel is more focused on its energy agenda and its energy marketing priority. Israel's policy to be recognized by the Middle Eastern states, like the UAE, is prioritized over ironing out relations with Turkey – especially under the leadership of Netanyahu's. France benefitted from this political frame to sell defense products to Greece and augment French policies in Libya and the Eastern Mediterranean. As a result, when one reviews the military activities of 2020, it becomes evident that the geopolitical picture in the Eastern Mediterranean is vulnerable to military escalation as a result of ongoing political rhetoric.

Military Escalation

The military appears to be an easy option for all sides to deliver a message of decisiveness. But such a dangerous course may escalate a tactical move into a regional conflict. The military alignment of the regional actors under the self-perception of being strong enough to defeat the other may push decision-makers to take firm decisions. In this context, the NAVTEX and NOTAM declarations have become the initial ground for Turkey and Greece to ignite a supremacy competition in the central Mediterranean Sea. Military exercises and protection of energy exploration activities appeared to be major events escalating the tension.⁷⁵ In parallel with low-profile military mobilizations, the wording of the decision-makers escalated the military preparedness, and served as a reminder of the probability of a tactical conflict. For instance, the Greek foreign minister emphasized that the constitutional obligation to

74 "Sisi: Cooperation with Cyprus, Greece Aims to Bring Stability to East Med Region", Al Aawsat, December 4, 2020, <https://english.aawsat.com/home/article/2663666/sisi-cooperation-cyprus-greece-aims-bring-stability-east-med-region> (accessed on December 12, 2020).

75 "Turkey-Greece Rival Military Exercises Due as Oil Tensions Rise", BBC, August 24, 2020, <https://www.bbc.com/news/world-europe-53892896> (accessed on December 12, 2020).

defend Greece from Turkish aggression will be fulfilled,⁷⁶ and concurrently warned Turkey of Greece's readiness to "defend its sovereign rights."⁷⁷ The Turkish response to these threats was the exploration activities with carefully identified geographical delimitations under the protection of the Turkish military.⁷⁸ Finally, the Greek naval presence and the Turkish military-supported energy exploration strategy led to a "mini" collision of Greek and Turkish warships.⁷⁹ Ankara called this military infiltration attempt by the Greek warships "provocative" because the Greek warship was in a course of collision with the Turkish vessel *Fatih* but was prevented by a Turkish warship, causing damages to the Greek ship. This aggression by Greece mobilized mediation by the EU under a German initiative, and NATO took measures to prevent a military conflict between the two NATO allies.

DYNAMICS OF TURKEY'S POLICY

The dynamics that affect Turkish policy can be grouped into five factors. These variables may fluctuate in terms of what strategy the involved actors prefer and how any change can transform the overall course of the energy-power competition in the region. The Turkish-Libya memorandum on delimiting the maritime zone of both countries, for instance, is perceived as a challenge and spun the political escalation into an asymmetric military confrontation. In this sense, the first dynamic appears to be "energy politics" in so far as the political agenda in the region is to ensure the secure extraction of the energy resources and transferring them to the markets while advantaged states continue to hold the political initiative at the expense of the disadvantaged ones. The energy-driven, rising economies, like Egypt and Israel, will receive the initial revenues and taxes that could promote their economies. This trend will create a gap between the advantaged and disadvantaged states, promoting instability in the region in the form of asymmetric confrontations.

76 Paul Antonopoulos, "Greek FM Emphasizes That Constitutional Obligation to Defend Greece from Turkish Aggression Will Be Fulfilled", *Greek City Times*, June 15, 2020, <https://greekcitytimes.com/2020/06/15/greek-fm-emphasises-that-constitutional-obligation-to-defend-greece-from-turkish-aggression-will-be-fulfilled/> (accessed on December 12, 2020).

77 "Greece Warns Turkey of Readiness to 'Defend Its Sovereign Rights'", *Al-Masdar Al-'Arabi* (The Arab Source), August 10, 2020, <https://www.almasdarnews.com/article/greece-warns-turkey-of-readiness-to-defend-its-sovereign-rights/>, (accessed on December 12, 2020).

78 "Turkey-Greece Tensions Escalate over Turkish Med Drilling Plans", BBC, August 25, 2020, <https://www.bbc.com/news/world-europe-53497741> (accessed on December 12, 2020).

79 Michele Kambas and Tuvan Gumrukcu, "Greek, Turkish Warships in 'Mini Collision' Ankara Calls Provocative", Reuters, August 14, 2020, <https://www.reuters.com/article/us-greece-turkey-warships/greek-turkish-warships-in-mini-collision-ankara-calls-provocative-idUSKCN25A161> (accessed on December 12, 2020).

The second dynamic is the long-lasting Turkish-Greek/Greek Cypriot competition on the sovereign rights regarding the “Sea of Islands” and the Mediterranean Sea. The Treaties of Lausanne (1923) and Paris (1947) do not establish sovereignty over all the islands currently in Greece. On the other hand, there are islands and rocks, which give Turkey maritime rights and are in Turkish jurisdiction. Furthermore, the methodology used to identify the extent to which islands and rocks have a maritime zone will be influential on political and military options because Greece recognizes the islands as continents in defining the limits of territorial waters, continental shelf, and exclusive economic zone. Such an approach makes Turkey a land-locked Anatolian state despite the fact that Turkey is bordered by three seas and has the longest shoreline in both the Mediterranean and Black Sea.

Greece’s challenge, and the backing of the U.S. and the EU, may push Turkey to review its maritime strategy, as the third dynamic. Turkey may be forced to be more active in the seas by means of the Turkish Navy and Air Force, and military escalation might be the most likely course. A military confrontation may lead to an isolation of Turkish interests in the wider region that can increase regional geopolitics, as the fourth dynamic. The regional dynamic can force Turkey to resist the synchronized aggression of the advantaged states of the Mediterranean. On the other hand, all the mentioned dynamics may push the regional powers to start an armament program in response to the development of an effective Turkish defense industry. The S400 and F35 disputes with the U.S. and the Greek “request” to embargo the Turkish defense industry will spark a “security dilemma” in the region.

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2021?

The Eastern Mediterranean does not give rise to an issue of energy resources but is a political question of the sovereign rights of Greece while Turkey is concerned on both sovereign rights and economic dynamics. Greece is concerned about having the sea link between Greeks and Greek Cypriots broken and the demise of the famous “enosis” (lit. union) within the “Megali Idea” (lit. Great Idea). It is important to note that there is no discovery of energy resources in the disputed waters west of Cyprus but only military and survey ships. This political agenda is excused by energy-based politics while Greece enjoys the EU commitment to Greek interests. This Greek and Greek Cypriot attitude is expected to be a continuous strategy since the only dynamic which will challenge it is the relations of Turkey with the EU and the U.S. If Turkey fixes the relations with both, the Greek and Greek Cypriot agenda will be marginalized. The other states, mainly Israel and Egypt, are more inclined

to an energy-based economy, which has already kicked off. Their motivation will be to check and balance Turkey as far as they perceive Turkey as a threat. Otherwise, a compromise may be on the agenda of all. It should be noted that such a discourse can emerge in the context of political transformation of these countries. Netanyahu or Sisi are the latest but not the last rulers of Israel and Egypt.

The developments that are classified as energy, political, and military are not expected to change in the coming year. However, all politics in the Middle East and North Africa are vulnerable to regime and government changes. If the overall structure of the involved countries remains, we can expect no variation of the previous policies. Nevertheless, any change in the governments and regimes may challenge the current preferences of the relevant state actors. The escalation of political and military crises has always been the most likely course to address the problems in the region. In this case, this scenario appears to be the most probable option as long as the EU and the U.S. encourage Greece to pursue harsh policies disregarding probable solutions. Once the EU and the U.S. are more consistent and abide by international law, showing concern for the security of the Western hemisphere, there will be no room for confrontation but for a fair distribution of the resources.

Turkey's policy, hence, will be dependent on the actions of the involved states and the changes in the structure of the regions. As long as Greece prefers an aggressive and provocative attitude exploiting EU and U.S. pledges, Turkey should be expected to counter it by means of political maneuvers, first, and by responses to Greece's military show of forces. The new U.S. administration will be decisive because Secretary of State Pompeo was biased against Turkey promoting military escalation and political crises in the eyes of the Turkish government. The EU seems to be divided in reaching a unified stance, and Turkey will continue to observe the EU's approach. But a one-sided political approach and the language of threats will not change Turkey's agenda. Turkey differentiates between current problems, like political ones, and ones that regard sharing energy resources. Turkey is determined to defend its political rights as recognized by the Lausanne Treaty in terms of sovereignty. Energy, on the other hand, is based on an understanding of fair and just shares that will include Turkey and Turkish Cypriots in the regional energy equilibrium.

Overall, the aforementioned dynamics can be assessed in order to estimate what could be faced in the coming term. The first dynamic, which was expressed as energy politics appears to have two facets. The first is the motivation of the advantaged states to maximize their interests instead of a collaborative attitude. The Turkish proposal is to have a conference attended by all to determine the basis of a fair share and to

curb the general political tendency of the involved states. Turkey's attitude toward Israel and Egypt depends on their stance towards Greece and the Greek Cypriots. These two countries will focus on what they stand to gain and lose since Israel and Egypt possess less maritime territory than they could have. On the other hand, they perceive Turkey as a threat to their interests. A political compromise among Israel, Egypt, and Turkey will change the overall course of the energy geopolitics in the region. It is a fact that Greece is too far away to be involved in the energy politics, and that political and military engagement make all undertakings costlier for all states.

The issue of territorial waters appears as the most sensational dynamic that will maintain the political and military escalation. The option might be a political compromise, a military confrontation with political turbulences, and international courts. Where the attitude of the EU and the U.S. is concerned, political compromise seems a less appealing course since Turkey does not perceive their attitude fair and just. Greece is well aware of this and pushes them to assume this problem as if it were their own. Military confrontation is a matter of tactical level misunderstanding; the number of the problematics are many and occur in remote regions where political decision-makers cannot calm the tense engagements of warships and aircraft at all times. Furthermore, there are political-level disagreements like Greece's militarized islands contrary to treaties, the length of the territorial sea based on the fact the 12-mile declaration is a *casus belli* for Turkey, and an arms race encouraged by both Russia and the Western defense companies.

Consequently, the coming period will be tense and provocative in terms of the number and context of the unsolved problem fields. It appears that a wide-scale political negotiation process based on international law, under the mediation of truly impartial actors – if they exist, is required to prevent a regional conflict. The preference of regional countries will determine the overall course based on the two extreme options: to focus on sole interests or to build sustainable energy politics.

LIBYA: DESTINED TO FIGHT OR DETERMINED TO PROSPER?

SUMMARY OF 2020

- Haftar is defeated and hindered from capturing Tripoli in 2020. The strategy of the countries backing Haftar is crushed by the GNA.
- The U.S. and the UN, along with European states, pushed a political solution to establish a new balance that will bind the GNA and Haftar within a frame they have identified and to force Russia to leave Libya.
- The political process has started, not by the will of external actors, but as a result of pressure by the Libyans. A free election is on the agenda but challenges still persist that make efforts vulnerable to internal grievances and external incursions.

Libya has become the focus of the region for a decade. The latest year was challenging in terms of starting the state-building process for Libya and the struggle of Libyans to survive. The year 2020 was a turning point for the military quest of the revisionist actors towards a smart political process. The question to be examined is whether the political process can achieve what could not be obtained by

military assets or is it a reflection of the exhaustion felt by the long-lasting Libyan quagmire. This chapter attempts to reveal the transformation of the methodology applied by the warring parties and their backers in their attempt to respond to the underlining problem. In this sense, the discussion aims to present a projection concerning Libya taking Turkey's perception as the epicenter. For this purpose, military and political developments will be examined to identify indicators and understand the course of events.

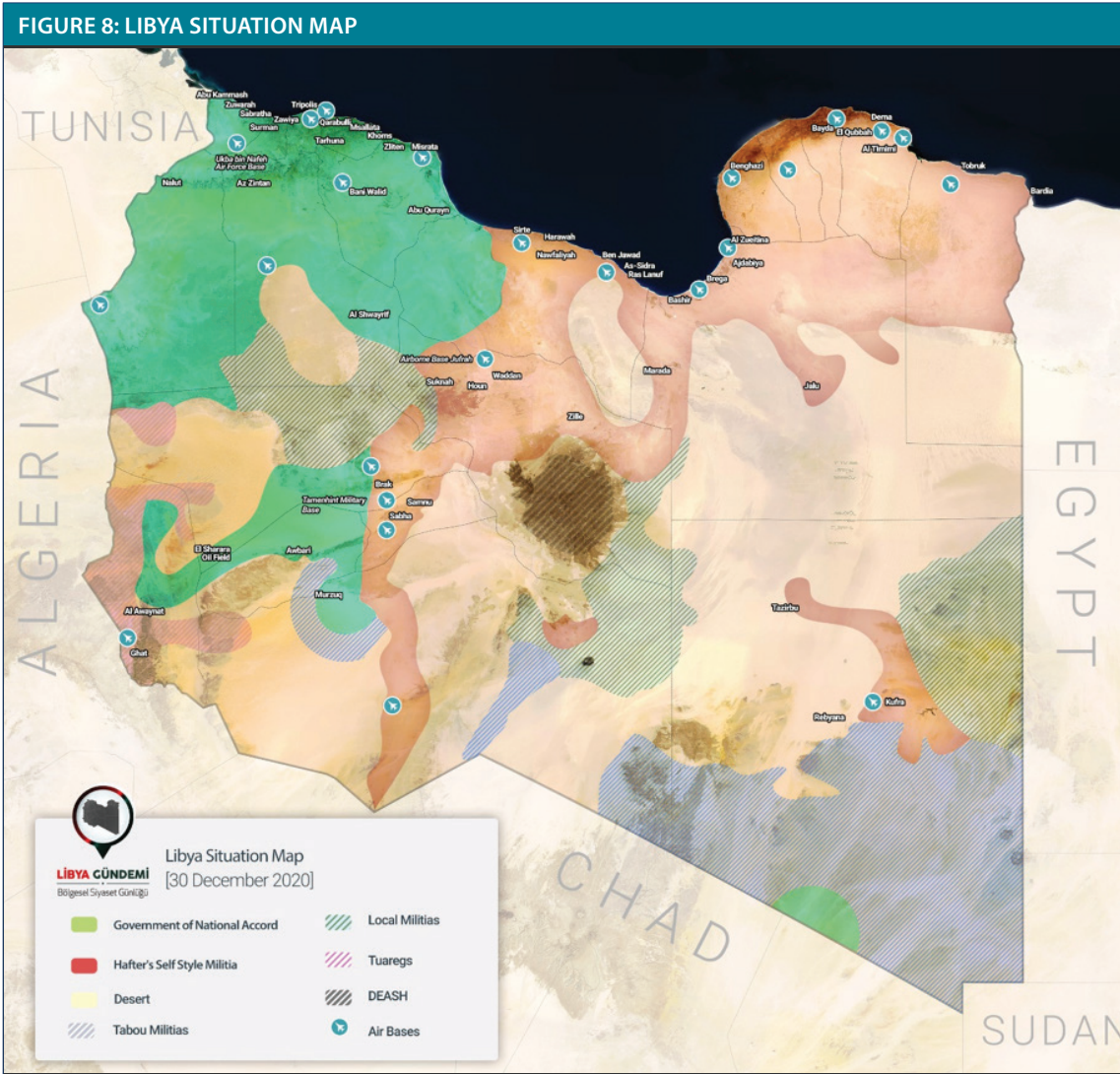
MILITARY DEVELOPMENTS

Any military assessment of Libya should start with a discourse-based analysis of the timeline of the military engagements and the obtained outcomes. For this purpose, this section will analyze the series of military confrontations to assess if the military strategies served to develop beneficial political outcomes for Libyans and how they might transform the agenda of the international and regional dynamics and politics. A brief analysis of what has happened and is currently happening will offer indicators of what might happen in the coming term, including another escalation of the conflict.

The conflict in Libya has a long history. Haftar's attack on Tripoli on April 4, 2019, will be the *terminus a quo* since current diplomacy and quarrels are intensely shaped by Haftar's latest attack. Haftar captured almost all the country except Tripoli and was close to the Tripoli port that is 3 km from the positions of Haftar's self-styled army, augmented by the Russian private military company Wagner and foreign mercenaries, which are funded and equipped by the UAE.⁸⁰ In his assault to topple the legitimate Government of National Accord (GNA), which is recognized by the UN and the other states, Haftar has benefitted - and is still benefiting - from the material support of the UAE, Saudi Arabia, Egypt, France, Israel, Jordan, Greece, and Russia.⁸¹ Haftar was close to achieving his objective until the indirect intervention of Turkey.

80 "US Accuses UAE of Funding Russian Mercenaries in Libya", The Middle East Eye, December 1, 2020, <https://www.middleeasteye.net/news/uae-libya-russia-us-accuses-funding-mercenaries> (accessed on December 13, 2020).

81 "Who Is Supporting Libya's Khalifa Haftar?" TRT World, May 8, 2020, <https://www.youtube.com/watch?v=qc-DEc7gDYGk> (accessed on December 13, 2020).



Source: Libya Gündemi, December 30, 2020

Haftar's attack on the War Academy in Tripoli and the request of the GNA moved Turkey to sign a bilateral agreement with the GNA. Turkey is the only country, other than Qatar, solidly providing support to the GNA. Turkey assumed the role in Libya to mentor, train, and assist the "not well-synchronized" Libyan military units under the GNA. In this context, Turkey initiated a military plan to organize what needs to be done and advised the Libyan commanders on how to implement it. This approach surfaced the potential of the Libyan forces and led them to start Operation Volcano Rage to defeat Haftar's militia, which is vastly augmented by foreign mercenaries, a Russian military company, and has been "offered" complex weapons systems. The Turkish assistance was actually a challenge, not only to Haftar but to the countries

backing him. Turkey's role in the Libyan crisis, in favor of the legitimate GNA, has challenged the project of Eastern Mediterranean energy-based politics.⁸²

Turkey's balancing attempt, with a cost-effective approach, was to collaborate with Russia to commence a military-political dialogue between the GNA and Haftar, similarly current dialogues in Syria. Turkey and Russia, both competitors and collaborators depending on their interests, called both the GNA and Haftar to meet in Moscow in order to reach a cease-fire while Haftar rejected the offer and left Moscow.⁸³ The German government started another initiative in Berlin with the same objective. Haftar repeated his behavior and left Berlin with no compromise.⁸⁴ However, the conclusions of the Berlin Conference were voted in by the UN Security Council and issued as a resolution to provide an appropriate ground for establishing stability in Libya.⁸⁵

Haftar's insistence on capturing Tripoli led the GNA to review its military preparedness and start a fresh military campaign against Haftar's forces. Haftar's forces, first, were defeated from the northwest shores of Libya, Al-Watiya Air Base, and south of Tripoli that led to a unification of the northwest of Libya.⁸⁶ This military victory facilitated the salvage of the cities of Tarhuna and Bani Walid that were believed to be tough targets.⁸⁷ Tarhuna's urban structure was a concern because of casualty expectation and the ambiguous attitude of the Tarhuna people. Interestingly it became apparent that Haftar's forces had executed civilians to suppress the local residents and this fact eased the victory of the GNA forces. The discovery of many mass graves in Tarhuna indicated Haftar's brutal treatment of civilians.⁸⁸

82 "Turkey's Intervention Threatens to Become Game-Changer in Libya", *The Irish Times*, May 22, 2020, <https://www.irishtimes.com/news/world/africa/turkey-s-intervention-threatens-to-become-game-changer-in-libya-1.4260310> (accessed on December 13, 2020).

83 "Libya's Haftar Leaves Moscow Without Signing Ceasefire Agreement", *Al Jazeera*, January 14, 2020, <https://www.aljazeera.com/news/2020/1/14/libyas-haftar-leaves-moscow-without-signing-ceasefire-agreement> (accessed on December 13, 2020).

84 "Libya Peace Talks to Go Ahead in Berlin Despite Ceasefire Setback", *The Guardian*, January 14 2020, <https://www.theguardian.com/world/2020/jan/14/libyan-warlord-haftar-leaves-moscow-without-signing-ceasefire-deal> (accessed on December 13, 2020).

85 "Security Council Endorses Conclusions of Berlin Conference on Libya, Adopting Resolution 2510 (2020) by 14 Votes in Favour, 1 Abstention", *The UN Security Council Resolution*, February 12, 2020, <https://www.un.org/press/en/2020/sc14108.doc.htm> (accessed on December 13, 2020).

86 "Libya: GNA Recaptures Towns Near Tunisia Border from Haftar", *Al Jazeera*, May 19 2020, <https://www.aljazeera.com/news/2020/5/19/libya-gna-recaptures-towns-near-tunisia-border-from-haftar> (accessed on December 13, 2020).

87 "Libya: GNA Forces Regain Control of Strategic Bani Walid Town", *Al Jazeera*, June 6 2020, <https://www.aljazeera.com/news/2020/6/6/libya-gna-forces-regain-control-of-strategic-bani-walid-town> (accessed on December 13, 2020).

88 "Another Three Mass Graves Discovered in Libya's Tarhuna", *The Middle East Eye*, October 13 2020, <https://www.middleeasteye.net/news/libya-tarhuna-more-mass-graves> (accessed on 13 December 2020).

The overall tempo of the GNA's military campaign was promising. The state actors that provide support to Haftar were motivated to stop the GNA's advance so as not to lose control of the Oil Crescent and to keep the perceived "Turkish-backed" forces away from both the wealth and Egypt's border. Haftar had captured Sirte, the gate of the Oil Crescent, with the support of Salafi-Madhali militias, which were once the GNA units in the city. The GNA forces advanced to the city. An air assault, with an unknown flag, halted the GNA's forces at the west and south of the city. This intervention was the turning point since Egypt overtly announced its military support to Haftar and threatened to start a military campaign against the GNA.⁸⁹ The Egyptian leadership delineated that the GNA could not pass the Sirte-Jufra line. The escalation of crises mobilized the German government to mediate. The German-led Berlin Conference of January 19, 2020, became the milestone for reaching an armistice again. As a result, military terms gave way to the political process after Haftar's defeat.

POLITICAL DEVELOPMENTS

The Conclusion of the Berlin Conference was endorsed by the UN Security Council in Resolution 25 (2020) to urge warring parties to terminate the conflict. In this sense, the United Nations Support Mission in Libya (UNSMIL) assumed the initiative to start the political process. But this attempt coincided with societal unrest in Tripoli and Benghazi due to the lack of services, social welfare, and prosperity. Encouraged with the UNSMIL's vision, protests forced the key leaders to start the political process, facilitate the oil production, and export in order to increase revenues to stabilize public life. In accordance with the efforts of the UNSMIL, the U.S., which was hesitant to become involved in the conflict and was in touch with both the GNA and Haftar, activated its national assets, like the U.S. Embassy, the U.S. African Command, and the U.S. diplomats in the UNSMIL.

The agenda of the U.S. can be described as a three-fold approach. The first issue was to regain initiative by political assets since Russia and EU countries were active in gaining outcomes from a political solution. The second issue was to gain from the post-conflict projects in Libya. In this sense, the U.S. demanded the start of a security sector reform project for defense sales and an audit of the accounts of the Libyan Central Bank to guarantee the payments. Finally, the U.S. was con-

89 "Egypt Threatens to Intervene in Libya as Pro-govt Forces Advance", Africa News, June 22, 2020, <https://www.africanews.com/2020/06/22/egypt-threatens-to-intervene-in-libya-as-pro-govt-forces-advance/>, (accessed on December 13, 2020).

cerned with the presence of Russia and Turkey in Libya in so far as it might pose risks to U.S. expectations. The U.S. strategy is political, rather than military, and urges all parties to reach a compromise and observe the U.S. desires in Libya and the Eastern Mediterranean.

The UNSMIL commenced political pressure for parties to agree on negotiating under the observation of the UNSMIL acting chief, Stephanie Williams, after the U.S. seemed more prone to a political solution. The role of the U.S. was, first, to start shuttle diplomacy to persuade the external state actors to stop intervening in Libya. Williams, on the other hand, pursued a strategy of multiple committees to negotiate in Tunisia, Malta, Switzerland, Egypt, and Morocco. The center of gravity in these meetings has become to establish a permanent cease-fire and normalization.⁹⁰ Williams prioritized the 5+5 Military Committee to compromise based on common grounds.

The political process, launched by the UNSMIL, coincided with the announcement of Prime Minister Fayez al Serraj that he will leave the office at the end of October 2020 and that an election would take place.⁹¹ This approach paved the way for a compromise for a permanent cease-fire, freedom of transportation across Libya, and oil production that had been stalled by Haftar's intervention after the 5+5 Military Committed meeting. The UNSMIL went further and gathered the Libya Political Dialogue Forum (LPDF) in the city of Ghadames in Tunisia.⁹² The LPDF, composed of 75 representatives, discussed the political calendar and compromised on an election on December 24, 2021, the National Day of Libya. The forum agreed on having a transitory government, facilitating the parties in sharing the positions in the GNA, although the proposed names locked the meetings. The forum decided on building a mechanism to identify the criteria and candidates to fill the positions, rather than selecting names for specific missions at the very initial phase of the discussions. However, the forum's negotiations hardened the process since neither of the parties accepted the other's candidate. The UNSMIL pushed for a compromise but the process seems to be a long journey.⁹³

90 "Libyan 5+5 Joint Military Commission to Meet in Libya for the First Time", UNSMIL, October 31, 2020, <https://unsmil.unmissions.org/libyan%C2%A055%C2%A0joint-military-commission%C2%A0meet-libya-first-time> (accessed on December 13, 2020).

91 "Samer Al Atrush, Libyan Prime Minister Sarraj to Resign Soon, Officials Say", Bloomberg, September 15, 2020, <https://www.bloomberg.com/news/articles/2020-09-15/libyan-prime-minister-sarraj-to-resign-officials-say> (accessed on December 13, 2020).

92 "Libyan Political Dialogue Forum", UNSMIL, <https://unsmil.unmissions.org/libyan-political-dialogue-forum> (accessed on December 13, 2020).

93 Abdelkader Assad, "Full-Quorum Libyan HoR Session in Ghadames Pushed to December 21", *Libya Observer*, December 8, 2020, <https://www.libyaobserver.ly/news/full-quorum-libyan-hor-session-ghadames-pushed-december-21> (accessed on December 13, 2020).

The political process commenced a political race in Tripoli among political figures. Political parties focused on communicating with the Libyan public to start their campaigns while they search for foreign backing. Meanwhile, external state actors got in touch with the political parties and key leaders to have a share of the post-conflict restructuring efforts. It appears that the military confrontation has left room for political forms of new competition where local and international actors are more intertwined.

In the end, Libya has succeeded in moving away from a conflict and towards a political process, Haftar appears marginalized after he was sued in the U.S. for his war crimes and the mass graves identified in Tarhuna. Aqela Saleh, chairman of the Tobruk Parliament, has become the political figure who replaced Haftar and is recognized as the representative of the eastern part of Libya. On the other hand, the security situation is still fragile in Libya because most militia groups are not under control, and the interests of external actors, like Russia and the UAE, will be harmed if a political process is achieved by an election. For this reason, it is still premature to assess any deal in Libya.

DYNAMICS OF TURKEY'S LIBYA POLICY

The dynamics that could shape the Turkish Libya policy may be assessed along four dynamics. These dynamics are not about Turkish interests but about regional stability. The first dynamic is Libya's unity since a divided Libya will cause a domino effect in the Middle East and North Africa. Such a political challenge will be a matter for the region, not the intervening foreign actors. In this context, the challenge to the borders of the regional actors will ignite another "Arab Winter," favoring despotism and suppressing the public. The second dynamic, affiliated with the first one, is the political will of the Libyan people. General elections and a constitutional referendum are essential demands that no political figure can deny to the Libyan public.

The third dynamic is about external interference. Initially, Turkey displayed a passive defensive posture which has now become an active one. Libya is an extension of the Eastern Mediterranean energy politics and external actors pursue a very active strategy in implementing asymmetric and hybrid warfare to achieve their energy agendas. Meanwhile, this dynamic poses a risk to the stability of Tunisia and Algeria at a later stage as if a regime formatting process is not in place. Affiliated with external interference, the final dynamic is the recognition of the Turkish interests, which were solidified by agreements with the GNA. An external

interference in a process of formatting the regime will endanger the Turkish interests in the long term.

LIBYA IN 2021

Libya's discourse was hard to assess and will continue to be such. The dynamics are many and conflicting interests are prone to escalate tension. The mentioned dynamics appear enduring and interrelated in the coming term. Libya's unity can be at risk if external interference continues at the current level. The will of the Libyan people, by means of democratic courses, may be a solution though. Still, external interference may deter the positive, office-based undertakings of the UNSMIL. Turkish interests, on the other hand, can be correlated with the first three dynamics. Such a frame pushes a comprehensive approach that will be transparent and honest in obtaining an attainable and acceptable course of action.

Other than the aforementioned dynamics, the internal issue fields present hindrances in achieving a political solution. Armed groups, for instance, hold the actual power in the city centers and societal structure is complicated to terms of introducing solutions since they endanger the strength of the power-holders. Libya needs comprehensive state-building made possible by the compromise of all civil, political, and armed segments of society. Hence Libyans need a democracy that will not inform any Qaddafi-type figure in Libya. In this sense, elections are crucial to achieving a stable Libya. But it is still early to predict if elections will be realized or not.

All of these dynamics inform a limited number of projections in relation to Turkey. These are as follows:

- The political process continues by an interim technocratic government, but elections cannot be achieved. This option will introduce a new political environment in Libya denouncing the authority of the GNA. The U.S. and EU states together with the revisionist regional states will favor such an option so as to prolong the political process and achieve macro-strategies. Turkey may support the process but resist the exploitation of the interim nature of Libyan politics.
- The political process continues by an interim technocratic government and elections take place for an enduring and democratic Libya. The will of the Libyan people will determine the overall course that Turkey and the other actors will respect.
- The political compromise may be challenged by another military confrontation that will deepen the instability. External interference may provoke the

escalation of conflicts while Turkey will be determined to support the legitimate GNA.

- An escalation of military conflicts may push the Libyan people to mobilize on their own and repeat the 2011 Revolution. Turkey will observe the escalation and attempt to ease the situation.

TURKEY AND THE MIDDLE EAST: A NEW ERA?

SUMMARY OF 2020

- The COVID-19 pandemic has ravaged the Middle East, exposing failing state structures in many cases.
- The explosion in the port of Beirut rocked Lebanon which continues to battle political strife and increasing interference in its domestic affairs by Iran and France.
- The Abraham Accords were signed between Israel, the United Arab Emirates (UAE), and Bahrain, heralding a new Gulf-Israel axis.
- Iran persisted with its “strategic patience” doctrine despite the assassinations of Qasem Soleimani at the beginning of the year and Mohsen Fakhrazadeh in November.

In 2020, the Middle East, like the rest of the world, remained shadowed by the coronavirus pandemic. Iran became the first Middle Eastern nation to experience a significant outbreak, with many among the Iranian political elite becoming infected. The COVID-19 pandemic has in many cases laid bare the ailing state structures in

some of the Middle East's conflict areas, such as Syria and Yemen, where the true nature of the pandemic is yet to be ascertained. In all likelihood, thousands have succumbed to this illness in the absence of functioning health systems and lack of testing capacity.

While COVID-19 has dominated the agenda in the Middle East, the region has continued to be home to some interesting developments. The Abraham Accords, the agreement between the United Arab Emirates, Bahrain, and Israel to normalize relations under U.S. auspices, was inked in the White House on August 13. As the year drew to an end, the newfound cordiality between Abu Dhabi and Tel-Aviv was bound to change the geopolitical landscape.

The year 2020 began with the assassination of Qasem Soleimani, Iran's general heading the Quds Force, by a targeted U.S. drone strike. Rather ironically, as the year came to an end, Mohsen Fakhrizadeh, the mind behind Iran's nuclear program, was also assassinated, yet the perpetrator remains unknown, with Iran blaming Israel for the incident. Iran continues to employ its "strategic patience" doctrine against intensified U.S. and Israeli aggression, and has thus far not intensified its attacks.

The explosion in the port of Beirut was also a major milestone for the Middle East in 2020. The explosion exposed the weakness of the Lebanese state and the persistent political crisis that Beirut finds itself in. In the rush to Beirut that materialized in the aftermath of the explosion, foreign interference in Lebanon's domestic politics became far more acute, with French President Macron visiting Beirut on two occasions after the incident.

Turkey's Middle East agenda in 2020 was largely dominated by security concerns, as it has been for the last four years. Turkey continues to sit at the apex of counterterrorism efforts in northern Syria and pursues its deterrence policy against the PKK in both Syria and Iraq. Ankara has opposed the Abraham Accords, labeling it an abandonment of the Palestinian cause, and thus continues to position itself against Abu Dhabi's growing regional agenda, all the while championing the Palestinian cause. While the pandemic has hindered much of international diplomacy and travel, President Erdoğan visited Doha in July, in testament to the ever-expanding relationship between Qatar and Turkey.

DYNAMICS SHAPING TURKEY'S MIDDLE EAST AGENDA

Turkey's policy in the Middle East has several dynamics; these are either structural, in that they endure, or conjectural, in that they are subject to changing regional realities. Structural dynamics in this regard include Turkey's deep historical links to the

Middle East via the shared legacy of the Ottoman Empire. Turkey's structural presence is also maintained in its membership in NATO and the security architecture of counterterrorism efforts against the PKK, DAESH, and other terrorist organizations. The conjectural dynamics are elaborated below.

Bracing for Biden

A contentious issue for the Middle East will be the new U.S. administration under Biden who is poised to take office in January 2021. Players in the Middle East are already gearing for the post-Trump era, which will likely see a renewed interest by Washington in asserting some form of U.S. dominance in the region. Trump's "America First" policy will not be given a new lease of life under Biden, who for all the non-interventionism of the Trump era, will undoubtedly seek to make the United States more felt across the playing field. This has prompted Turkey, among others, to recalculate the U.S. presence in the region. With regard to Turkey-U.S. relations in the Middle East, this change in Washington will likely be felt in Syria, where the U.S. administration continues to support the YPG, the Syrian military arm of the PKK.

As Biden prepares to take on the helm of the United States, the question of the post-American Middle East will once again become a matter of debate. The great departure of the United States from the Middle East, ensuing in the Obama years and culminating with Trump, gave leeway to Turkey to fill the void left behind. As a result, Turkey now enjoys a proactive role in the region. This role initially materialized with Turkey's cross-border counterterrorism operations in northern Syria, such as Operation Peace Spring and Euphrates Shield. Now, however, it has expanded to encompass areas such as Libya, where Turkey functions as an interlocutor and a regional stabilizing force in the absence of leadership from the United States. As Biden seeks to balance the politics of the post-Trump era, he must also be weary of the reality of the post-American Middle East, where Turkey has emerged as a key player.

Turkey's newfound regional role alongside the possibility of a more interventionist United States constitutes the main parameters of this dynamic. However, it should be noted that the U.S. position will prompt other actors too, especially the Saudis and Iranians who are watching the transfer in Washington unfold. Iran will likely look out for a return to the Joint Comprehensive Plan of Action (JCPOA) while Saudi Arabia will consider the fallback from a Biden administration that will likely not be very friendly with Riyadh. This should, in turn, impact Turkey's relationship with Saudi Arabia, which has recently thawed as Riyadh seeks to mend its

regional isolation⁹⁴ and Iran which could resurface as a result of the pressure on the regime diminishing.

Turkey-Qatar Axis

While certainly a significant aspect of the landscape, Turkey's relations with Qatar should at this point be considered part of Ankara's institutionalized alliances, and hence a given for any future policy projections. Turkey's investment in its relationship with Qatar and vice versa have produced one of the most unique partnerships in the Middle East and have firmly placed Turkey at the center of developments in the Gulf. Turkey's military bases in Doha, alongside Qatar's novel interest in acquiring Turkish high-grade military products, form the security aspect of the relationship. Qatar and Turkey, however, are bound by a far greater shared *Weltanschauung* that both countries continue to project onto the Middle East.

This shared worldview has materialized in many of the conflicted areas in the region, be that Egypt, Libya, Syria, or the Gulf region as a whole. It is in Libya that Turkey and Qatar are both aiding the Government of National Accord towards the goal of eliminating the threat from the putschist General Khalifa Haftar. Vis-à-vis Syria, Ankara, and Doha continue to coordinate with the Syrian opposition in order to bring an end to the bloodshed and achieve a political solution where the Assad regime is ousted and is made to answer for its crimes. More broadly, Qatar and Turkey share the goal of supporting popular movements across the Middle East against the vehement "conservative" powers that seek to prevail on the status quo, such as the likes of the UAE and Saudi Arabia.

Abraham Accords

The Abraham Accords have set the stage for major regional realignment. While the normalization between Israel and the UAE has been hailed as a major blow to Iranian influence in the region by Western policy circles, this is hardly the case, as the UAE continues to practice caution when dealing with Iran. In fact, the Abraham Accords more acutely point towards an alignment against Turkish interests, albeit one that has been brewing for some time. The United Arab Emirates seeks to enlist Israeli support for its ambitious regional agenda, whether that is in contentious areas such as Yemen and Libya or more broadly in its attempt to project itself as a major pow-

⁹⁴ Batu Coşkun, "What Is behind Saudi Arabia's Rapprochement with Turkey?" *Daily Sabah*, November 26, 2020, <https://www.dailysabah.com/opinion/op-ed/what-is-behind-saudi-arabias-rapprochement-with-turkey> (accessed on December 15, 2020).

erhouse in the Middle East. This is manifest in the Emirates' purchase of the F-35 fighter jets from the United States, and its bid to utilize Israeli military intelligence superiority as a result of normalization.

Bilateral Normalization(s)

A series of bilateral normalization processes constitute an important dynamic for Turkey's position in the Middle East. Chief and most intriguing of these processes has been Turkey's relationship with Israel. Despite the Obama-brokered normalization that took place between Turkey and Israel in the long aftermath of the Mavi Marmara Incident, culminating in the exchange of ambassadors in 2017, relations have once again gone at loggerheads due to Israel's persistence in occupying areas of the West Bank and maintaining a blockade in Gaza.

Regardless of the persistence of diverging philosophies, and radically different understandings of the Palestinian question, Israel and Turkey are reported to have been continuing in back-channel talks, especially via members of the intelligence community. The goal here is not the establishment of strategic ties that once existed between Turkey and Israel, but rather to reach a mutual accommodation of sorts regarding regional disputes. Such a rationale most acutely pervades the Eastern Mediterranean, but Turkey and Israel have the ability to cooperate in Syria and Lebanon, as both countries are cautious of an ever-expanding Iranian foothold in the region. An unspoken mutuality is shared between Israel and Turkey in the Nagorno-Karabakh conflict, where Turkey and Israel have both militarily supplied the successful Azerbaijani offensive and have thus cut off a major point of Iranian influence.

A similar case of normalization can be argued between Cairo and Ankara. El-Sisi has never been keen on Turkey, viewing the ousted Mohammed Morsi's ties to Turkey with distrust. This sentiment is mirrored in Ankara, yet there now appears political will on both ends to enter a period of mutual understanding, especially with regards to the energy resources of the Eastern Mediterranean basin. Turkey and Egypt are naturally overlapping economies, and cooperation with regard to energy would result in a new paradigm of "normalized" ties between Ankara and Cairo.

Last on the list of bilateral relationships that constitute a dynamic in Ankara's Middle East projections is the relationship with Saudi Arabia. As a matter of fact, Turkey and Saudi Arabia already enjoy normal relations, with leaders of both nations having remarked on cordial ties in recent statements. Yet, the relationship continues to function under the gloom of the Khashoggi affair and other disputes that have arisen over the last months. Chief among them has been an unofficial boycott of Turkish goods entering the Kingdom, which appears to have been enacted by Saudi

authorities to chastise Turkey for diverging geopolitical goals and its insistence on pursuing the perpetrators of Jamal Khashoggi's murder.

The boycott, however, appears to have been resolved with political will from both sides signaling a warm rapprochement. Turkey and Saudi Arabia had turned to one another in the Obama years in order to pursue a common agenda in Syria where the United States was missing politically and militarily. Now, as both countries gear for Biden, they see that a détente serves their interests in balancing out the United States.

Troublesome Neighbors to the East: Iran

Among Turkey's bilateral relations, one of the most nuanced is the one that it maintains with the regime in Iran. Turkey and Iran are geopolitical rivals in almost all of the region's disputed areas, yet they also accommodate one another and cooperate when need be. This is most apparent in Syria and recently with regards to joint intelligence sharing regarding the PKK activities, which Iran had often been deaf to in the past. Iran though is irksome of Ankara's growing regional role, realizing all too well that the West's security interests are represented in Turkey's presence in areas such as Syria and the conflict in Nagorno-Karabakh, and more broadly in its positioning against Iran's expansive regional hegemonic agenda.

PROSPECTS FOR 2021

Forecasting the Turkish relationship with the Middle East for 2021, certain dynamics are bound to persist, largely unchanged, while others will undoubtedly shape Ankara's engagement with the region in a novel manner. The table below illustrates the likelihood of engagement via each dynamic in Turkey's Middle East policy.

With relation to Biden, Ankara is likely to engage with the new U.S. administration proactively. Messages on this have already been conveyed from the Turkish government, with President Erdoğan remarking that he “knows Biden well” and that there is room for cooperation, despite certain earlier statements made by Biden aiming at the Turkish president.⁹⁵ Erdoğan will likely see “politics as politics” and construct a robust level of engagement with the U.S. administration when it comes to Middle Eastern affairs. Turkey will continue to press for the end of U.S. support to the Syrian arm of the PKK, the YPG, and will also persist in arguing that the United

⁹⁵ Batu Coşkun, “Is There Any Hope for Turkey-US Ties to Get Back on Track?”, *Daily Sabah*, November 13, 2020, <https://www.dailysabah.com/opinion/op-ed/is-there-any-hope-for-turkey-us-ties-to-get-back-on-track> (accessed on December 10, 2020).

States' best interests in the Middle East lie in fruitful dialogue with Turkey. In this regard, Biden's foreign policy positions, as well as those adopted by senior members of his national security team vis-à-vis the Middle East, will steer Ankara's engagement with the United States.

In Qatar, an active continuation of Turkey's existing ties with Doha is to be expected. Ankara and Doha will be undeterred in maintaining strategic ties, even though the Gulf crisis has ended with a *modus vivendi* between Qatar and the other Gulf powers. In fact, Turkey's position in the Gulf will strengthen as a result of this normalization in the Gulf, as it will place Ankara once again at a position of dispersing stability and fostering strong regional cooperation.

The Abraham Accords have already prompted a harsh response from Turkey, and hence this should continue in 2021, with Ankara actively seeking to dispel the growing regional bloc headed by the UAE. Turkey in this sense will most likely seek to return to the status quo regarding the Palestinian question, advocating for the Arab League-headed Palestinian mission in solving the matter. As Abu Dhabi and Tel-Aviv solidify their bonds and possibly move on to strategic levels of regional cooperation, Turkey should be expected to actively engage in confronting this brewing coalition.

In the matter of Turkey's various processes of bilateral normalization in the Middle East, one should once again expect Ankara to act robustly. A political will from the upmost echelons of the Turkish government seeks to see Turkey's bilateral regional relations normalized. This willingness is likely to persist in Ankara and transcend into 2021. Recent diplomatic postings to Israel and Saudi Arabia, alongside reports that the Turkish intelligence has amped up efforts to engage with both Israel and Egypt, signify that 2021 may see some fruition in Turkey's efforts to normalize relations with countries with which deep differences persist. Turkey, in this sense, is actively engaging in the hopes of fostering cooperation based on mutual economic interest and political gain that would pave the way for a new basis for bilateral ties. It should be noted that, the normalization process between Qatar and GCC countries may facilitate Turkey-Saudi Arabia normalization in the upcoming term.

In its dealings with Iran, 2021 should not see any drastic change to former policy. In fact, if recent efforts by Turkish officials to downplay bilateral disputes with the country are any indication, Ankara will likely steer clear of confronting or engaging with Iran. Turkey is likely to continue to acknowledge Tehran's destructive regional agenda, but should not be actively engaged in constructing an anti-Iranian policy. Rather, Turkey's Middle Eastern footprint should prove deterrent enough in containing the Iranian regime's ambitions.

On all accounts considered, Turkey is most likely to continue with direct engagement, by virtue of its proactive policy in the Middle East and the wider region. Turkey's engagement will once again be dictated by a strong security rationale, but should also be expected to contain novel calculations. Chief among these being the new U.S. administration and the need to resolve long-standing bilateral disputes with powerful regional players.

FIGURE 9: TURKEY'S MIDDLE EAST ENGAGEMENTS IN 2021



Source: Compiled by the authors

TURKEY'S EFFECTIVE COUNTERTERRORISM POLICY

SUMMARY OF 2020

- In 2020, varying sources of terror networks were active along the same lines as the previous year.
- Turkey intensively engaged with the terrorist organizations by military means in Iraq and Syria, and authorized security forces inside Turkey.
- The main focus of Turkey's counterterrorism operations was to secure the established security belt in the vicinity of the Turkish borders in order to prevent terrorist infiltrations and mobilizations to Turkey.
- Turkey aligned humanitarian concerns and measures with countering terrorism efforts to prevent further humanitarian disasters in Syria.

Similarly to the previous year, countering terrorism was one of the prominent issues related to Turkey's security challenges. In 2020, Turkish security forces focused on neutralizing the imminent perils emanating from the PKK not only at Turkey's territorial boundaries but also within the territories of Iraq and Syria where state authority is not well-established. In this context, apart from the permanent mili-

tary posture in Syria, 48% of the total operations were conducted in Iraqi territory throughout the year.⁹⁶ For this purpose, a series of operations suppressed terror networks; the operations to neutralize terror cells were named “Kapan” “Yıldırım”, and “Pençe.” For example, for the comprehensive counterterrorism effort of Turkish security forces, the “Kapan-1 Bagok” operation was initiated by the Mardin Gendarmerie Command that represents the basics of the Turkish counterterrorism posture. This operation was an integrated effort of the Gendarmerie Commando and Gendarmerie Special Forces (JÖH), the Police Special Forces (PÖH), village guard teams, and 60 other operational teams.⁹⁷ Similarly, the “Kapan-8 Ağrı Mountain-Çemçe-Madur” operation took place in Ağrı, Kars, and Iğdır, participated by 1,012 personnel and 62 operational teams in March.⁹⁸ Şırnak has become another focus with the “Yıldırım-1 Cudi” operation with a total of 102 teams, 1,485 personnel, including 58 commando teams, 12 gendarmerie special operations teams, 12 police special operations teams, 18 village guard teams, and 2 mixed teams.⁹⁹ During the latest “Yıldırım-16” operation, 2,571 personnel and 153 operational teams, consisting of Gendarmerie Commandos, JÖH, PÖH, and village guard teams were assigned.¹⁰⁰ Within the scope of the “Yıldırım” operations, which were launched on July 13, 2020, to eliminate terrorism, a total of 148 terrorists were neutralized; 77 collaborators were caught; 455 caves, shelters, and warehouses were destroyed; and significant amounts of weapons, equipment, varying types of ammunition, food, and living materials were seized.¹⁰¹ The names point to certain regions where that terror cells were situated, and indicate the outreach of security forces in varying geographical conditions.

Concerning the cross-border operations, within the scope of “Claw-Eagle” and “Claw-Tiger” operations, air assaults were the main effort against the terrorist positions in the regions of Avasin Basyan, Hakurk, Sinjar, Karacak, Qandil, and Zap,

96 Terrorism Analysis Platform, www.tap-data.com

97 “Mardin’de ‘KAPAN-1 BAGOK’ operasyonu başlatıldı”, *Anadolu Agency*, January 11, 2020, <https://www.aa.com.tr/tr/turkiye/mardinde-kapan-1-bagok-operasyonu-baslatildi/1699372>

98 “Son dakika haberler: Bakanlık açıkladı! Kapan-8 operasyonu başladı”, *Hurriyet*, March 13, 2020, <https://www.hurriyet.com.tr/gundem/son-dakika-haberler-bakanlik-acikladi-kapan-8-operasyonu-basladi-41467989>

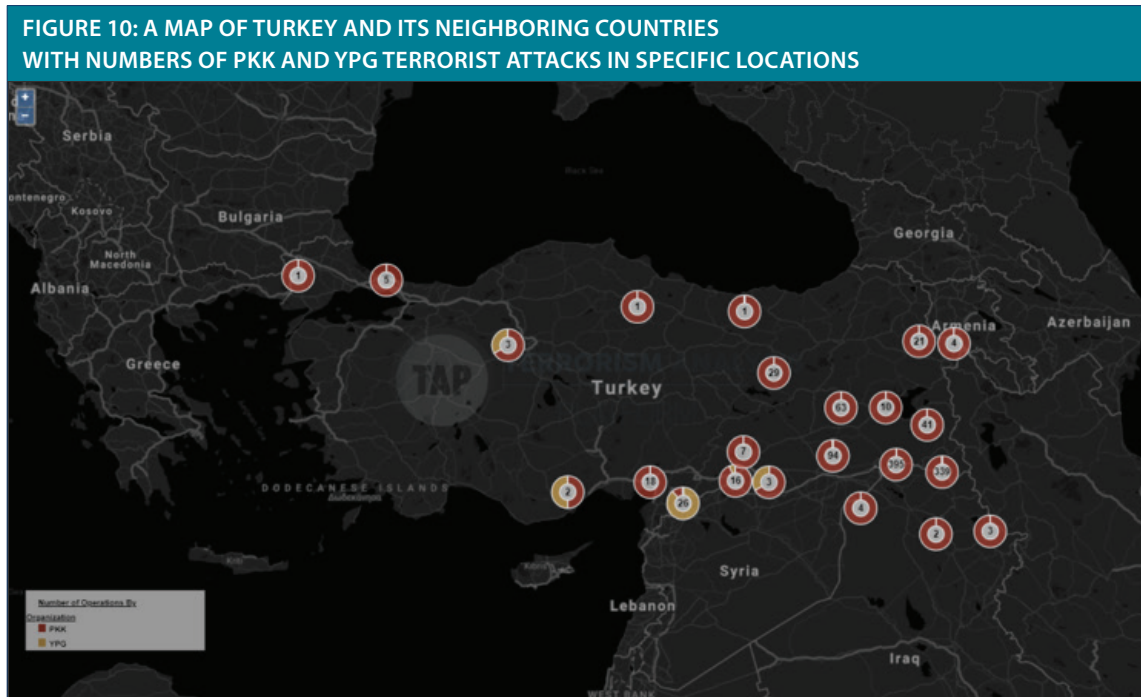
99 Şırnak’ta ‘Yıldırım-1 Cudi Operasyonu’ başlatıldı”, *Anadolu Agency*, July 14, 2020, <https://www.aa.com.tr/tr/turkiye/sirnakta-yildirim-1-cudi-operasyonu-baslatildi/1910158#> (accessed on December 02, 2020).

100 “Yıldırım-16-Sehi Ormanları Operasyonu Başladı!”, The Republic of Turkey Ministry of Interior Gendarmerie General Command, December 7, 2020, <https://www.jandarma.gov.tr/yildirim-16-sehi-ormanlari-operasyonu-basladi> (accessed on December 10, 2020).

101 “İçişleri Bakanlığı Sözcüsü Çataklı: Yıldırım operasyonlarında 148 terörist etkisiz hale getirildi”, *Anadolu Agency*, December 4, 2020, <https://www.aa.com.tr/tr/turkiye/icisleri-bakanligi-sozcusu-catakli-yildirim-operasyonlarinda-148-terorist-etkisiz-hale-getirildi/2065367> (accessed on December 10, 2020).

located in the north of Iraq and used as bases by terrorists. The ultimate goal of these assaults was to prevent the increasing harassment and attack attempts of the PKK towards the Turkish Armed Forces (TAF) across the border and beyond. Furthermore, comprehensive operations, with the participation of commando units, the air force, fire support units, army aviation with ATAK helicopters, and UAVs targeted the PKK's Haftanin base.¹⁰² In brief, recently, Turkey's consistent efforts to neutralize the perils emanating from the PKK have switched the theater of conflict from Turkish to Iraqi soil.

Turkey's counterterrorism operations, both inside and outside the country, can be observed in the following chart with designated numbers. The vast majority of the operations were conducted in the proximity of the Turkish borders with Syria and Iraq.



Source: Terrorism Analysis Platform (TAP), www.tap-data.com

Currently, Turkey has put military pressure on the terrorist organization in a way that the PKK has great difficulty in finding an exit door. In the coming term,

¹⁰² "Pençe-Kartal Operasyonu başladı", TRT News, June 15, 2020, <https://www.trthaber.com/haber/gundem/pence-kartal-operasyonu-basladi-492704.html>; "Son dakika! Pençe-Kaplan Operasyonu başladı", *Habertürk*, June 17, 2020, <https://www.haberturk.com/son-dakika-pence-kaplan-operasyonu-basladi-2714874> (accessed on December 02, 2020).

the dynamics which will determine the fate of the PKK are the PKK's floundering attempts to attack Turkey, Turkey's enduring counterterrorism operations, the clashes between the KDP and the PKK, and lastly, the stressed and strained relation between the Qandil and the PYD, as assessed below.

DYNAMICS OF TERRORISM AND COUNTERTERRORISM

The PKK's Quest for Novel Tactics

As a consequence of the decisive counterterrorism operations conducted in 2020, the PKK has suffered from a high rate of casualties and losses both in terms of militants and equipment so that the number of PKK-related terrorist attacks decreased from 87 to 34 in Turkey.¹⁰³ Accordingly, in the summer, the PKK increased its arson attacks in an attempt to cause maximum damage while utilizing a small number of terrorists. For example, the PKK's "Children of Fire Initiative" took over the responsibility of the forest fires in Hatay and tried to turn them into a "propaganda tool" during a period when the organization was deprived of sufficient militants and equipment.¹⁰⁴ In addition, the terrorist organization, aiming to take advantage of the short-term uncertainty caused by the COVID-19 outbreak earlier this year, has resorted to black propaganda in order to wear away at Turkey by using its affiliates in Europe. Also, due to the insufficient militant numbers in its ranks, the PKK has tended to revive its ideological radicalism to promote its recruitment.¹⁰⁵

After the presence of the PKK in the Amanos Mountains was deterred specifically by the "Yıldırım-5 Amanoslar" operation, the terrorists attempted to infiltrate Turkey from the Syrian border. Two "paramotors" used by PKK terrorists who had come from Manbij were seized in the countryside of the Amanos Mountains. Subsequently, in October 2020, Murat Karayılan announced, "We are building our air forces." This referred to the fact that the PKK is preparing for "kamikaze attacks" on Turkey as retribution for TAF's operations.

Other than the "paramotor" tactic, the PKK has tried to imitate two different types of attacks previously used by other terrorist organizations. First, the terrorist

103 Terrorism Analysis Platform

104 "Terör örgütü YPG/PKK, Hatay'daki orman yangınına propaganda çalışmasına dönüştürdü", Anadolu Agency, October 10, 2020, <https://www.aa.com.tr/tr/turkiye/teror-orgutu-ypg-pkk-hataydaki-orman-yanginini-propaganda-calismasina-donusturdu/2002376> (accessed on December 02, 2020).

105 Murat Yeşiltaş, Murat Aslan, İsmail Akdoğan, Ümit Tetik, Ömer Özkizilcık, "Koronavirüsün Gölgesinde Silahlı Çatışma ve Terör Suriye, Libya, Yemen, PKK ve DEAŞ", *SETA Report*, 2020, <https://setav.org/assets/uploads/2020/05/R162.pdf> (accessed on December 02, 2020).

organization has attempted to imitate DAESH's "air attack" tactic in Syria and Iraq; however, the attacks by improvised remotely controlled aircraft systems carrying explosives were thwarted with the help of countermeasures by the TAF.¹⁰⁶ Second, the PKK tried to reproduce a "382 gm. handmade bomb in a metal container prepared to be placed under a vehicle"¹⁰⁷ previously used by DAESH in assassination attempts. This situation demonstrates that the previous and ongoing experience in Syria and Iraq have contributed to the PKK adopting new tactics and techniques for the consolidation of its attack techniques.

Turkey's Counterterrorism Strategy

Turkey's highly "dronified" counterterrorism strategy has materialized technocentric counterterrorism measures. Turkish UAVs have been instrumentalized as a decisive counterterrorism tool by virtue of their enhanced ISTAR (intelligence, surveillance, target acquisition, and reconnaissance) capabilities. Since 2016, Turkish UAVs have conducted over 100 operations and eliminated over 500 terrorists.¹⁰⁸ Most of the area, especially in northern Iraq, where counterterrorism operations are being carried out has been effectively controlled by UAVs. The freedom of transportation and maneuver, along with the logistics activities of the terrorist organization have been successfully disrupted. With the advance of its precise targeting assets, Turkey was able to conduct operations in remote areas without employing conventional combat aircraft.¹⁰⁹ The application of this dronification, area control, and a decapitation-centric counterterrorism strategy have rendered the PKK unable to respond effectively and have contributed to an asymmetric overmatch in favor of Turkey.

When observing the number of the overall operations, on the other hand, in 2017 one notices priority given to internal operations whereas, as indicated in the chart below, in 2020 the operations inside Turkey and in Iraq were better balanced.

106 "LEZGÎN – Gerila TV dimenê çalakiya li dijî Qereqola Girê li Çelê weşand", *Nuşe Ciwan*, November 17, 2020, <https://www.nuceciwan59.com/ku/2020/11/17/lezgin-gerila-tv-dimene-calakiya-qereqola-li-gire-cele-wesand/> (accessed on December 12, 2020).; "PKK'nın paramotor tehdidi: Kamikaze tipi saldırılarda kullanma riski var", *Yeni Şafak*, October 27, 2020, <https://www.yenisafak.com/gundem/pkknin-paramotor-tehdidi-kamikaze-tipi-saldirilar-da-kullanma-riski-var-3572574> (accessed on December 12, 2020).; "PKK: Şiladeze'deki Türk karakolunu havadan vurduk", *Rudaw*, August 24, 2020, <https://www.rudaw.net/turkish/kurdistan/240820203> (accessed on December 12, 2020).

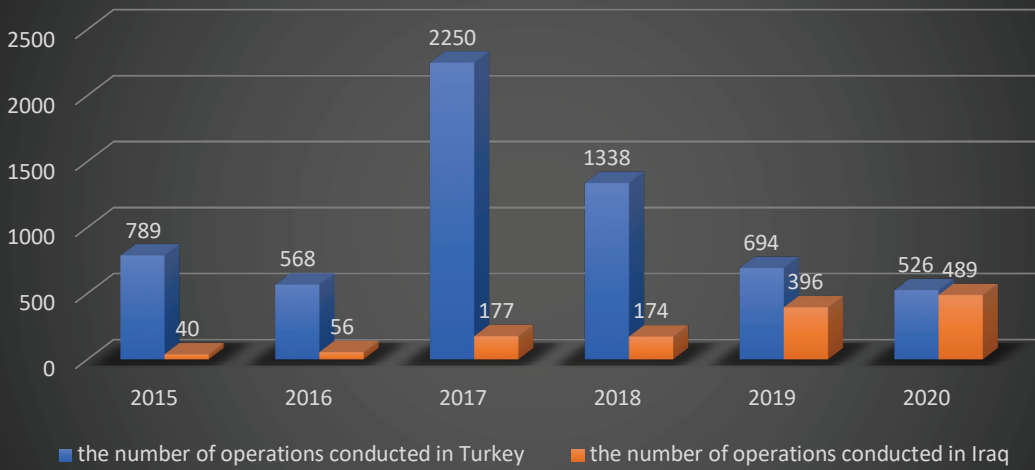
107 "PKK'nın bombaları mezarlıkta ele geçirildi", *Yeniçağ*, May 25 2020, <https://www.yenicaggazetesi.com.tr/pkknin-bombalari-mezarlikta-ele-gecirildi-280784h.htm> (accessed on December 12, 2020).

108 Terrorism Analysis Platform

109 Sibel Düz, "The Ascension of Turkey as a Drone Power | History, Strategy, and Geopolitical Implications", *SETA Analysis*, July 3, 2020, <https://www.setav.org/en/analysis-the-ascension-of-turkey-as-a-drone-power-history-strategy-and-geopolitical-implications/> (accessed on December 13, 2020).

The reason could be the decreasing numbers of terrorists in Turkey and their current position in neighboring states.

**FIGURE 11: TURKEY'S COUNTERTERRORISM OPERATIONS:
A REGIONAL COMPARISON STARTING FROM 2015 TO 2020**



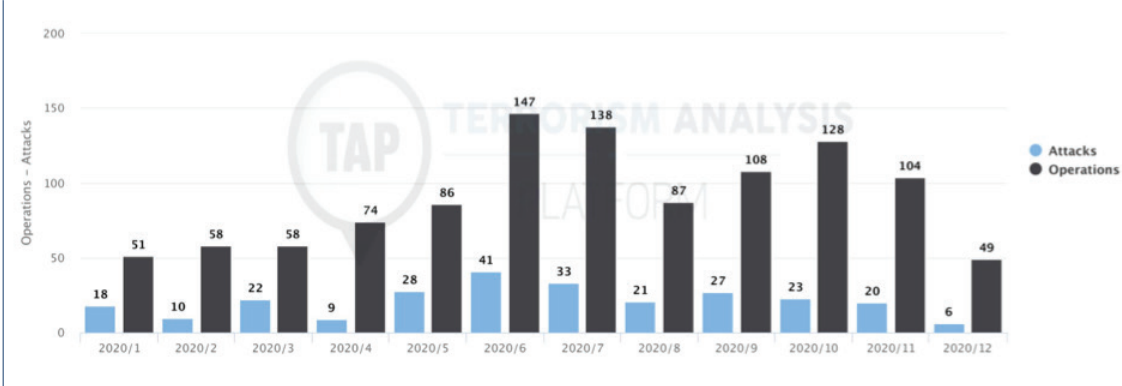
Source: Terrorism Analysis Platform (TAP)

Other than military operations, public support for Turkish security forces thwarted the PKK's main recruitment efforts. In this sense, the sit-in protest at the entrance of HDP's building initiated by a mother in Diyarbakır to get back her 21-year-old son from the PKK turned into a mass movement in September 2019. The process, which ignited the protests of the families of Kurdish descent in Diyarbakır, once again, revealed that the terrorist organization exploited the Kurdish families with the forced recruitment of children and stood as a reminder of the importance and necessity of soft preventive initiatives to limit the capacity of the PKK. In 2020, under the coordination of the Ministry of Interior, the number of those who escaped the PKK and surrendered to Turkish security forces after persuasion efforts reached 225.¹¹⁰

A comparison of Turkey's counterterrorism operations and attacks of the PKK/YPG is depicted in the chart below. The increasing number of operations by Turkish security forces have suppressed the number of PKK/YPG attacks in 2020. On the other hand, the number of operations also increased the number of armed clashes as Turkey's push against the PKK caused it to react and try to escape

¹¹⁰ The Ministry of Interior, Twitter, December 7, 2020, https://twitter.com/TC_icisleri/status/1336028366923829250?s=20 (accessed on December 13, 2020).

FIGURE 12: TURKISH ARMED FORCES' COUNTERTERRORISM OPERATIONS VS. THE PKK/YPG'S ATTACKS IN TURKEY AND NORTHERN IRAQ (2020)



Source: Terrorism Analysis Platform [TAP], www.tap-data.com

The PKK's Contentious Presence in Northern Iraq and Syria

By taking advantage of the chaos that occurred in the aftermath of the U.S. invasion, the PKK terrorist organization for many years has been setting up territorially controlled areas in the north of Iraq, primarily in the Qandil region. The PKK has used these areas to sustain command-and-control activities for committing terrorist attacks against Turkey and direct the activities in Iraq and Syria.¹¹¹ Particularly, under the pretext of fighting against DAESH, the PKK began to control Sinjar and converted it into a logistical line between Syria and Iraq, while increasing its influence and presence in Qandil and in areas such as Kirkuk and Makhmur.

As the PKK enlarged its territorial control, it inevitably came across the Kurdish Regional Government (KRG). Turkey's effective military actions such as Operation Decisiveness and the Operation Claw which aimed at area control in the north of Iraq have acted as a catalyst in this process and weakened the terrorist organization causing it to retreat further south.¹¹² Essentially, Turkey's ongoing ink-spot strategy for subduing the territories under the PKK influence in northern Iraq has enabled it to form numerous enclaves dispersed over the region and transformed the course of counterterrorism to its advantage. Terminating the PKK's presence in Iraq has become a common goal both for the central authority's ensuring physical integrity of Iraq and for the KRG's restoration of relations with the

¹¹¹ Can Acun, "PKK için Irak'ta Geri Sayım Başladı", *Sabah*, November 21, 2020, <https://www.sabah.com.tr/yazarlar/perspektif/canacun/2020/11/21/pkk-icin-irakta-geri-sayim-basladi> (accessed on December 20, 2020).

¹¹² Ibid.; Orhan Coskun, Daren Butler and John Davison, "Turkey Shifts Fight against Kurdish Militants Deeper into Iraq", *Reuters*, July 22, 2020, <https://www.reuters.com/article/us-turkey-security-iraq/turkey-shifts-fight-against-kurdish-militants-deeper-into-iraq-idUSKCN24N26F> (accessed on December 02, 2020).

central government.¹¹³ That's why, in October, a historic agreement between the Iraqi federal government and the KRG addressing major security and administrative deficiencies was finalized with a compromise on the Sinjar region.¹¹⁴ The attitude of the U.S. is a significant input in defining the course of the Turkish counterterrorism strategy. For instance, the U.S. has been encouraging negotiations between the PYD and the Kurdish National Council (ENKS, *Encûmena Nîştimanî ya Kurdî li Sûriyê*) in Syria. In this way, it can be abstracted that the U.S. has adopted a strategy to eliminate the influence of the PKK in Syria in return for Turkey's recognition of the entity in the east of Euphrates.¹¹⁵ As of November 2020, the negotiations between the PYD and the ENKS, which have been continuing since April 2020, was fruitless since there is not the slightest improvement regarding the future of the Roj Peshmerga and the breaking of the PYD's ties with Qandil.

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2021?

PKK's Terror Tactics

Given the lack of capacity and capability to organize lethal attacks on Turkish soil, the PKK will focus its propaganda activities on the mobilization of the PKK-affiliated diaspora in Europe. By doing so, the terrorist organization aims to put political pressure on Turkey by instrumentalizing European countries. Furthermore, in the coming period, it is expected that due to its insufficient capacity and capability, the terrorist organization will functionalize and increase the intensity of small unit tactics, attacks against natural resources, and attacks by fixed-wing or rotary-wing aerial platforms, which can be purchased on the Internet.

The Ministry of Interior announced that the number of terrorists within the territorial boundaries of Turkey decreased to 320, signaling a dramatic change from previous years.¹¹⁶ Under these circumstances, rather than continuing to apply conventional tactics, the PKK has preferred to maintain its current force capacity in Turkey. Therefore, it will resort to using novel tactics by imitating other terrorist organizations like DAESH's profound tactics in Syria and Iraq.

113 Murat Aslan, "PKK'nın Irak'ta Geleceği Var mı?", *Terrorism Analysis Platform*, December 8, 2020, <https://tap-data.com/article/pkk-nin-irak-ta-gelecegi-var-mi> (accessed on December 15, 2020).

114 "Baghdad, Erbil Begin Implementation of Sinjar Deal", Anadolu Agency, November 17, 2020, <https://www.aa.com.tr/en/middle-east/baghdad-erbil-begin-implementation-of-sinjar-deal/2047245>

115 Murat Aslan, "PKK'nın Irak'ta Geleceği Var mı?", *Terrorism Analysis Platform*, December 8, 2020, <https://tap-data.com/article/pkk-nin-irak-ta-gelecegi-var-mi> (accessed on December 15, 2020).

116 "Yurt içinde 320 terörist kaldı", *Milliyet*, November 21, 2020, <https://www.milliyet.com.tr/siyaset/yurt-icinde-320-terorist-kaldi-6365183>. (accessed on December 15, 2020).

The Asymmetric Overmatch in Turkey's Advantage

Turkey's extensive use of armed drones in hotly contested environments such as Syria and Libya may have considerable reverberations for future deterrence, air force doctrine, and the conduct of warfare. However, regarding military strength, the force employment on the tactical and operational levels of war still play a much more important role than either technology or numerical preponderance. On the flip side, the embrace of artificial intelligence-driven military weapons by Turkey's defense industry, especially in the areas of unmanned military systems and robotic warfare, will undoubtedly have greater outcomes in countering terrorism than any of the previous buildups.¹¹⁷

The PKK's Paradox in Northern Iraq and Syria

The decision by the KRG and the Iraqi federal government to deploy 6,000 security forces to Sinjar is a huge gain for Turkey while being a strategic loss for the PKK. The vandalization of the KDP offices in Sulaymaniyah during the public protests and the attacks on a key pipeline and Peshmerga soldiers perpetrated by the PKK are clear signs of the fact that Qandil does not want the unitary action of the Iraqi federal government and the KRG to succeed. However, the PKK will not surrender easily. By changing their flag and uniforms, it will try to protect its existence, especially through the Yazidis. Moreover, despite the PYD's vow to withdraw the PKK cadres from Syria, Turkey will remain suspicious of the operational ties of the PYD with Qandil. The coming period may witness another round of rivalry between the KRG and the PKK for the leadership of the Kurds, and the conflict might spread immediately to the northern line between Iraq and Syria.¹¹⁸

117 Alex McFarland, "Turkey Further Revolutionizes Defense Sector with AI Technology", *Unite AI*, October 21, 2020, <https://www.unite.ai/turkey-further-revolutionizes-defense-sector-with-ai-technology/>. (accessed on December 15, 2020).

118 Ömer Behram Özdemir, "ENKS & PYD Görüşmeleri: Müzakereler Durma Noktasında", *Suriye Gündemi*, November 5, 2020, <https://www.suriyegundemi.com/enks-pyd-goeruesmeleri-muezakereler-durma-noktasinda> (accessed on December 10, 2020).; Shelly Kittleson, "Iraqi Kurds Turn against the PKK", *Foreign Policy*, November 29, 2020, <https://foreignpolicy.com/2020/11/29/iraqi-kurds-turn-against-the-pkk/> (accessed on December 10, 2020).; Amberin Zaman and Dan Wilkofsky, "Child Recruitment Casts Shadow over Syrian Kurds' Push for Global Legitimacy", *Al-Monitor*, December 7, 2020, <https://www.al-monitor.com/pulse/originals/2020/12/syria-kurds-pkk-missing-youth-sdf-kobane-us-turkey-erdogan.html> (accessed on December 11, 2020).

TURKISH DEFENSE INDUSTRY ACTIVISM

SUMMARY OF 2020

- The modernization of all M60T tanks in the TAF's inventory has been completed while serial production deliveries of KAPLAN STAs started. Meanwhile, German authorities continued their reluctance to supply a powerpack for ALTAY MBT.
- The delivery of the *TCG Anadolu* was postponed to 2021 due to the pandemic while the prototype of Turkey's first Armed Unmanned Vessel (SIDA) was produced. Within the scope of the Meltem-3 Project, the first P-72 marine patrol aircraft was delivered to the Naval Forces Command.
- While the structural improvement of the first F-16 Block-30 aircraft was completed, it was stated that Turkey will not purchase any 5th or 4++ generation aircraft. On the other hand, Turkey's first national aviation engine PD170 went into serial production. Additionally, the TS1400 Turboshaft Engine Prototype was delivered towards the end of the year.
- It was announced that HISAR-A and HISAR-O air defense systems will be equipped with additional capabilities due to changes in the operational requ-

irements while the S-400 air defense systems were comprehensively tested in early October. It was stated that Turkey has no intention to purchase SAMP/T anti-missile systems and is committed to the joint development and production with export prospects.

- Turkish UAVs conducted successful operations throughout the year in a range of conflict zones and the serial production of AKSUNGUR UAV started. The COVID-19 outbreak caused export figures to decline while defense companies intensified their efforts to contribute to the health sector. A record level of defense exports was made to Azerbaijan during the year. Seven Turkish companies entered the Defense News Top 100 list. On the other hand, the U.S. decided to impose sanctions on Turkey under CAATSA.

DYNAMICS THAT INFORMED THE DEFENSE INDUSTRY IN 2020

Building on Current Capabilities

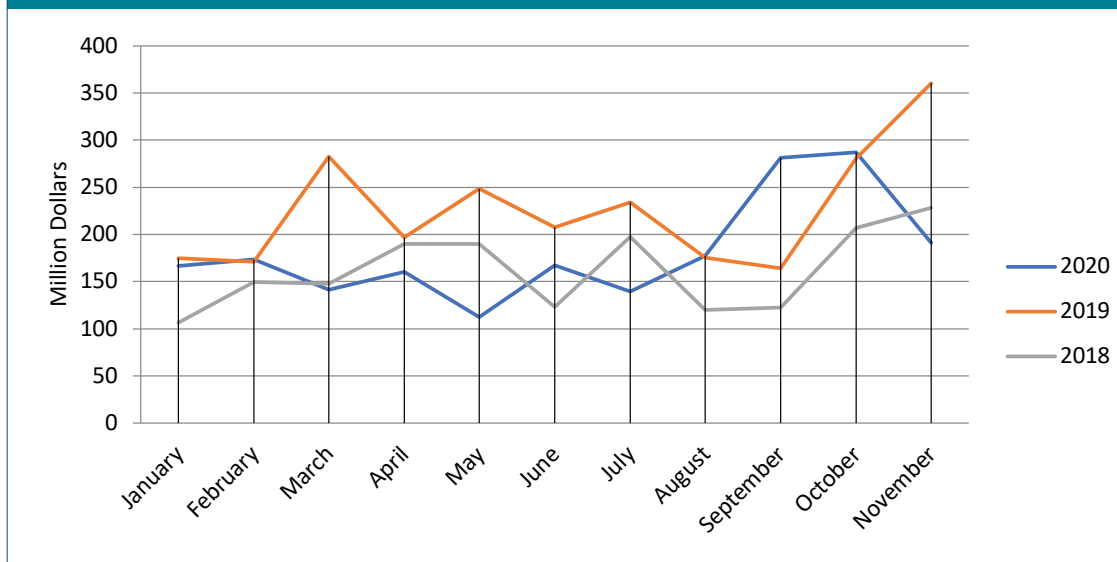
As a developing defense industry base, the foremost principle that informs the Turkish defense industry is to build on current capabilities. It is a realistic goal that is based on meeting current operational exigencies with ready capacities, resources, and abilities. The method is to develop and produce a variety of models within the product families so that they can be used in a range of different operations and missions. For instance, during Operation Euphrates Shield (August 2016-March 2017) M60T Main Battle Tanks (MBT) were particularly vulnerable to anti-tank vehicles and surprise attacks in asymmetric warfare. Thus, the completion of the modernization of M60T MBTs this year indicates a concrete success which increased the survivability of these platforms while enhancing their target detection and surveillance capabilities. The same logic can be seen in the comprehensive modernization of Turkey's main surface combatants with the MILGEM Project and the production of REIS Class air-independent propulsion submarines under the New Type Submarine Project.

Detecting Priorities

Investing in specific technologies in line with priorities is the second dynamic that informs the Turkish defense industry. It is a realistic goal because it sets a goal of meeting operational needs where foreign procurement becomes a problem while long-term commitments require time. Turkey's drone program is a clear example of

this prioritization strategy for three main reasons. First, several obstacles and delays in drone procurement in the past significantly troubled the country, decreasing military effectiveness. Second, the air force fighter fleet is aging and a problem could occur if their intensive flight hours were to continue. In recent years, drones are making considerable contributions to counterterrorism efforts and surveillance/reconnaissance missions, assisting F-16s which in turn extends the service life of the latter. Third, Turkey is committed to manufacturing its fifth-generation aircraft domestically and declared that there is no intention to purchase an off-the-shelf platform. As this is a long-term defense objective, Turkey invests in advanced drones in such a way as to equip them not solely for air-to-ground missions but also in air-to-air combat.

FIGURE 13: TURKISH DEFENSE AND AEROSPACE EXPORTS (2018-2020)



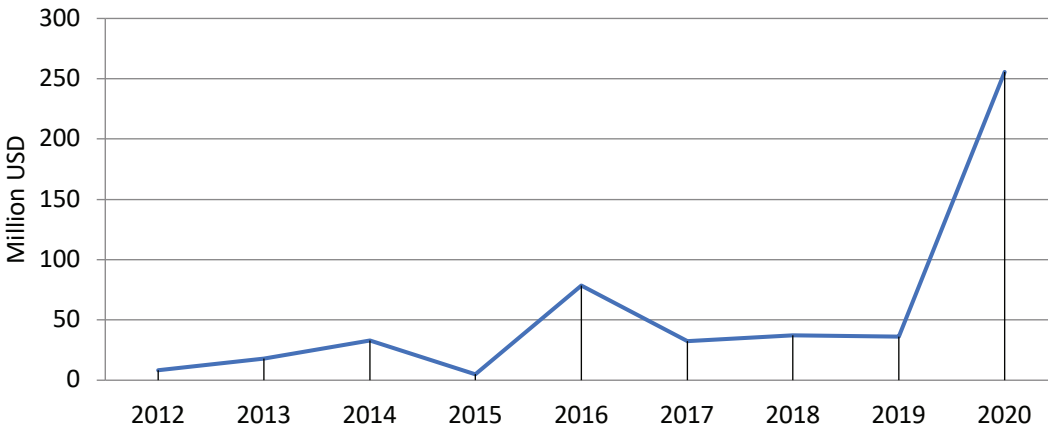
Source: Turkish Exporters Assembly, Export Figures 2020, 2019, 2018

Reducing the Effects of COVID-19 Pandemic

The third dynamic that informed the Turkish defense industry this year was to mitigate the debilitating effects of the COVID-19 pandemic. The pandemic damaged supply chains and severed communication, particularly regarding defense exports. Some major projects such as the *TCG Anadolu*, which is expected to be the flagship of the Turkish navy, had to be delayed. Due to the pandemic, the volume of defense exports significantly deteriorated, particularly between March and August. In the meantime, the conflict between Azerbaijan and Armenia (Sep-

tember-November) resulted in the record level of Turkish defense exports to the former. Although faced with sharp declines, the sector will end the year with a relatively soft decrease in terms of exports. Defense companies and affiliated organizations made efforts to adapt to the emerging circumstances by keeping up the work in compliance with all pandemic restrictions and by launching major virtual exhibitions.

FIGURE 14: TURKISH DEFENSE AND AEROSPACE EXPORTS TO AZERBAIJAN (2012-2020)*



* Export volume is calculated annually for the period January 1 - November 30
Source: Turkish Exporters Assembly, Export Figures, 2012-2020

EXPECTATIONS, PROSPECTS, AND CHALLENGES IN 2021

Investing in Dual-Use Technologies

Turkey aims to transform its defense industry into a driving force that will boost the development of civilian technologies; however, the defense industry in isolation cannot be a force for total development. The diffusion and synergy between military and civilian purposes should be enhanced. This objective will focus on two currently lagging major aspects: developing dual-use technologies particularly in health, energy, and transportation sectors, and achieving specialized skills at the middle/small businesses. On the other hand, emerging technologies such as cyber capabilities or artificial intelligence are rapidly developing and keeping the pace is a daunting task. The defense industry will be expected to make more efforts in these areas which are a must both for developing high value-added technologies and for meeting the needs of the future operational environment.

TURKISH DEFENSE INDUSTRY'S PERFORMANCE INDICATORS			
Performance Indicator	2019	2020*	2021**
National Contribution (%)	67%	69%	71%
Defense and Aviation Foreign Sales Revenue (million USD)	3.1	4.0	6.2
Defense and Aviation Industry Turnover (million USD)	10.9	16.5	19.7
Defense and Aviation Industry Employment (thousand persons)	73.8	77.5	81.5

* Prediction. ** Program

Source: Annual Program of Turkish Presidency for 2021, p. 180.

Increasing Efforts on Select Products

Due to the operational needs, or public expectations, efforts on specific programs will likely be increased in the coming year. For instance, addressing ALTAY MBT's powerpack problem will be a top priority while the serial production and deliveries of advanced UAV platforms such as AKINCI and AKSUNGUR have already been planned and announced. On the other hand, critical phases will likely be achieved regarding air defense systems such as the beginning of the serial production of the HISAR-A+ platform while the step-by-step approach in developing the multilayered national air/missile defense will be maintained with the objective to facilitate HISAR-O+ serial production as soon as possible.

Achieving Independence in Critical Sub-systems and Components

While the combat-proven platforms attract customers worldwide, license problems still impede the realization of major arms sales. The imposition of CAATSA sanctions poses a decisive risk to exacerbate this conundrum. The U.S. was already reluctant to provide export licenses for the completion of the export of ATAK helicopters to Pakistan and the Philippines. Although CAATSA sanctions only target the Presidency of Defense Industries, they also decrease incentives for bilateral defense industry cooperation and U.S. decision-makers are likely to be more reluctant toward Turkey. Thus, apart from achieving national capabilities to produce key sub-systems and components, it is likely that political relations will continue to overshadow major arms deals, creating uncertainties regarding the sustainability of the indigenous defense industry. On the other hand, to boost exports concerning other platforms, Turkey will likely develop a range of responses ranging from demonstrating presence in more defense exhibitions, developing country-based or project-based export solutions, assisting possible buyers with credit opportunities, and creating legal backgrounds by signing military and defense cooperation agreements to ease arms trade and technology sharing.

SETA SECURITY RADAR

TURKEY'S GEOPOLITICAL LANDSCAPE IN 2021

Strategic Flexibility under Geopolitical Anxiety

EDITED BY MURAT YEŞİLTAŞ

The year 2020 witnessed the rise of human insecurity not only in terms of the pandemic but also as a result of the continuation of military threats as conflicts took place all around the world from Syria to Libya, with no clear ending in sight. The nature of the warfare and conflicts, and the type of actors involved are in constant flow. Similarly, the increase in the activities of the international terrorist organizations, which are also gradually upgrading their warfare capacity, produced inevitable risks and lasting fear, making this phenomenon even harder to counter. The continuation of the conflicts and the rise of terrorism will play an important role in the states' overall security landscapes.

SETA Security Radar aims to offer a framework of strategic assessment of the major hotspots of Turkey's foreign and security policy initiatives. By providing a policy-relevant analysis, SETA Security Radar intends to promote an understanding and awareness among the decision-making circles and those who are interested in Turkey's geopolitical landscape in 2021.

