

SETA SECURITY RADAR

TÜRKİYE'S GEOPOLITICAL LANDSCAPE IN 2023

Prelude to the Centenary



Edited by
Murat Yeşiltaş
Bilgehan Öztürk

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FOREWORD



Burhanettin Duran
SETA General Coordinator

Russia's 2022 intervention in Ukraine shocked the international community. That incident was not limited to military intervention. It affected the global system and revealed that the post-Cold War status quo had ceased to be sustainable. At the same time, the situation in Ukraine expedited the resurgence of great power competition. Another conclusion that one can draw from that geopolitical shock is that European security is not an established and completed issue. After all, the Russian intervention in Ukraine confirmed that Russia represented a traditional military threat to Europe (as we have seen in NATO's 2022 strategic concept), and it remains unclear which direction Europe's relations with Russia will take considering the European security and defense architecture. At the same time, the Russia-Ukraine war went beyond those issues and aggravated the economic vulnerability, which originated in the coronavirus pandemic, due to rising energy prices. In this regard, Europe will face major challenges this winter. Furthermore, the Russia-Ukraine war fueled a food crisis (on top of all the aforementioned crises) and revealed how fragile the global food chain was.

In 2022, Türkiye found itself at the center of all those issues, including the resurgence of great power competition, the energy crisis, the deepening economic crisis, and the food crisis. For example, the country made several attempts to mediate between Russia and Ukraine, ultimately playing a crucial role in the prisoner exchange and the grain deal. Those efforts made possible a new kind of relationship between Türkiye and the West. In recent months, Ankara significantly contributed to the resolution of

the Ukraine crisis. At the same time, it took steps to create a new geopolitical portfolio in Central Asia through the Organization of Turkic States. Turning to the Middle East, the various steps that Türkiye had taken at the end of the previous year led to rapid normalization with regional powers in 2022. Accordingly, we witnessed an expedited normalization process with the United Arab Emirates, Saudi Arabia, and Israel. In addition, the Turkish government took a major step toward pursuing normalization with Egypt. That President Recep Tayyip Erdoğan was photographed with Egypt's Abdel-Fattah el-Sissi, too, could yield unanticipated results. Finally, Turkish Defense Minister Hulusi Akar's meeting with his Syrian counterpart, Ali Mahmoud Abbas, in Moscow (which represented the highest level of contact between the two governments in 11 years) was among the most significant developments in Turkish foreign policy in 2022.

Having discussed major developments that took place in Türkiye and worldwide in 2022, the Ukraine war and great power competition are expected to continue in the new year. Some of the main issues on Türkiye's foreign policy agenda for 2023 include (a) relations with the United States and Russia within the framework of the Ukraine war, (b) relations with Syria within the framework of normalization, and (c) tensions with Greece in the Aegean and the Eastern Mediterranean. The European energy crisis and a plan to transform Türkiye into an energy hub may increase the country's geopolitical importance in 2023. At the same time, we will witness a continuation of Greece's aggression toward Türkiye and normalization in the Middle East. Regarding the Eastern Mediterranean question, the energy policies of Egypt and Israel may be aligned more closely with the Turkish policy. Meanwhile, Greece might double down on its divisive and challenging stance toward Libya, which it adopted in 2022. Indeed, the militarization of Crete and a plan to transform the island into a source of power hint at such an outcome. One should also expect the European Union to play a more prominent and active role in the global game to combat energy and economic crises. Turning to the Middle East and the Caucasus, Russia's heightened activity level and Iran's domestic turmoil are expected to affect those regions. Whereas the anticipated changes in Syria (in light of the most recent meeting in Moscow) could create a new atmosphere in Syria, the instability in Iraq may persist in the long run. Meanwhile, Türkiye will continue to pursue its existing policy toward Africa and remain committed to launching new initiatives toward Southeast Asia within the framework of "Asia Anew." The enlargement of the Organization of Turkic States, the consolidation of the Turkish Republic of Northern Cyprus' observer status, and the organization's emergence as a new cultural, linguistic, and eco-

conomic force despite China and Russia's influence could gain further momentum in 2023.

Beyond all those geopolitical calculations, the 2023 elections shall represent one of the most significant turning points for Türkiye. Ahead of the 2023 elections, the escalation between Türkiye and Greece remains the most critical issue on the country's foreign policy agenda. In response to Germany's efforts to de-escalate tensions by bringing together Türkiye and Greece, Ankara made concrete proposals. Athens, by contrast, has not shown the necessary amount of interest. Foreign policy will remain an active area as the country approaches a general election. Depending on the outcome, a rupture may occur in foreign policy. If the ruling party wins the 2023 elections, it will stick to the current foreign policy to consolidate Türkiye's geopolitical role. However, in case of an opposition victory, the country will have to make new geopolitical calculations. If political power were to change hands, observers must expect major changes regarding problem areas – such as Türkiye's relations with the European Union, the United States, Russia, and Syria – that left their mark on the last decade. If the current government stays in power, however, one could assume that the AK Party will tackle existing problems boldly (assuming that the people have endorsed its foreign policy) to strike a more conciliatory tone as needed and challenge adversaries in the face of direct threats.

In this regard, *SETA Security Radar: 2023* aims to analyze the geopolitical climate where Türkiye operates, the significant aspects of the country's foreign policy initiatives, and various issues related to Türkiye's security. It is certainly possible for those flashpoints to impact Türkiye's national security. This report presents predictions about Türkiye's potential steps and approaches regarding security and foreign policy. The purpose of the *SETA Security Radar* is to analyze policy to raise awareness among decision-makers and individuals interested in Türkiye's main security and foreign policy issues.

I extend my gratitude to all team members for contributing to this report.

TÜRKİYE'S GEOPOLITICAL OUTLOOK: THINKING BEYOND 2023



Murat Yeşiltaş



Bilgehan Öztürk

01



SUMMARY OF 2022

1

The U.S.' constant support for the YPG and Türkiye's fights against the YPG continued to be one of the structural problems in bilateral relations.

2

President Erdoğan attended the first meeting of the European Political Community that was organized for the first time upon the invitation of French President Emmanuel Macron.

3

In Istanbul, on July 22, Türkiye, Russia, and Ukraine signed the grain deal, which enabled the export of grain from Ukraine and Russia.

4

President Erdoğan said that it is possible to negotiate with the Syrian regime.

5

Israel-Türkiye normalization has been achieved through the official visits paid by Israeli President Isaac Herzog, Foreign Minister Yair Lapid and Foreign Minister Mevlüt Çavuşoğlu in addition to the meeting between President Erdoğan and Prime Minister Lapid on the sidelines of the U.N. General Assembly.

6

With the new agreements made this year, Türkiye has cooperated with more than 20 countries in Africa in the field of the defense industry.

7

Türkiye signed defense and military cooperation agreements with countries from Europe, Africa, Asia, the Middle East, and Latin America while defense exports continued their upward trend.

8

On November 20, 2022, the Turkish Air Forces launched a series of airstrikes – dubbed Claw-Sword – hitting the targets located in the Qandil, Asos, and Hakurk regions in the north of Iraq and the Ain al-Arab, Tal Rifaat, Jazire, and al-Malikiyah regions in the north of Syria. PKK targets in Ain al-Arab were targeted for the first time with a comprehensive air campaign.

Türkiye is at the center of a series of geopolitical, security, and destabilizing challenges ranging from the war in Ukraine, the fragile peace in the southern Caucasus, widespread mass protests in Iran, terror threats from northern Iraq and northern Syria, Türkiye-Greece tension over the Aegean and Eastern Mediterranean to the negative impacts of the more global and transnational issues such as great power politics, economic impacts of the global pandemic and mass irregular migration that exacerbate the existing challenges. In line with such a challenging environment, Türkiye puts up certain coping mechanisms and policies to mitigate the damaging impacts of the said risks and challenges and strives to seize opportunities that might arise out of crises as much as possible.

In this new volume of SETA Security Radar, we analyze the main dynamics shaping Türkiye's security and geopolitical landscape with references to the most significant foreign policy and security issues throughout 2022. Since Türkiye does not navigate in a vacuum we also take stock of the regional and global contexts of the issues of highest concern and preoccupation for Türkiye. Based on our assessment of the dynamics and developments defining Türkiye's security and geopolitical landscape, we predict how these dynamics and developments will pan out in 2023.

GLOBAL POLITICS

Global trends and shifts shape the environment in which individual countries or states can implement their policies and also determine their strategic orientation. The global processes such as the COVID-19 pandemic and the ensuing economic problems, the relative decline in the power and influence of the U.S. as the leading power, its strategic and geopolitical reorientation toward the Asia-Pacific region as well as its degrading commitment to Europe and the Middle East and North Africa (MENA) region, and finally, the

Russian invasion of Ukraine, all had their collective impact on the overall transformation of the international environment at the macro level. Apart from the war in Ukraine, all of these processes are long-term phenomena and have already been underway albeit gradually for years. The ongoing and existing macro trends and shifts were compounded by the war in Ukraine in 2022, which, at least for now, diverted the attention of the U.S. from China to Russia with regard to great power politics.

In addition to the geopolitical shock after the Ukraine war, the U.S.-China confrontation over Taiwan, and the return of classical geopolitical competition between Europe and Russia; the increasing energy prices, energy insecurity, and the fragility of food security pose an existential threat to the stability of the international system and change the states' strategic orientation in the international politics.

TURKISH FOREIGN POLICY

The systemic transformation and the affiliated turbulence in world politics, which was arguably first outlined by former President Barack Obama in his "Pivot to Asia" strategy and was also maintained by his nominally very different successors albeit in different styles, have been impacting the policies of all actors in international politics, and Türkiye has not been an exception. The most immediate and direct impact of the said transformation process on Türkiye has been the steady deterioration of its relations with the U.S., save for a couple of occasional thaws in the past decade. The diversion of the long-term strategic priorities between Türkiye and the U.S. has created a conducive environment for the emergence of numerous individual and seemingly isolated crises between the two. The U.S.' negligence or at least the failure in paying due attention to Türkiye's national security concerns pushed the latter to embrace a more "autonomous" and arguably more security-oriented conduct in its foreign and security policies to ensure its core national interests. This more autonomous and security-oriented conduct has also been coupled with determined and increased investments in Türkiye's indigenous defense industry, which in return bolstered the autonomous and security-oriented conduct further.

On the other hand, the very environment and dynamics that forced Türkiye to act more autonomously were also a source of motivation for Türkiye's regional rivals to act more assertively and bold at a time when multilateralism was dramatically in retreat and the U.S. was much less interested in the region and less attentive to the concerns of its traditional allies. This "vacuum" locked Türkiye and other regional powers in MENA in a fierce geopolitical struggle until it became unaf-

fordable and unfeasible for all. This awareness of the futile or exhaustive nature of the geopolitical confrontation among the regional players paved the way for ushering in a period of normalization and rapprochement in MENA.

However, the normalization and rapprochement between Türkiye and its regional rivals is not an isolated development peculiar to Türkiye's foreign relations with especially the MENA countries. *It is rather a part of a wider drive of Türkiye to create a much more comfortable area to maneuver its foreign policy.* It is no secret that while facing existential threats to its national interests for years, Türkiye's resorting to the use of occasional military power as well as its more confrontationist attitude for ensuring its interests contracted its area of maneuvering in foreign policy. *Now Turkish foreign policy is undergoing a phase of freezing and consolidating the gains it achieved through decisive and confrontationist policies of the past, by mending its strained ties with certain countries and making greater use of its diplomacy to increase the number of its allies, or at least friendly nations.*

2022: A NEW GEOPOLITICAL CALCULATION

In 2022, Türkiye's security and geopolitical outlook have been shaped by both macro and global as well as regional trends and developments such as great power politics, continuing effects of the global pandemic in the economy, and the war in Ukraine. Türkiye's response to these trends and developments has been nuanced conduct in its foreign and economic policies starting from late 2021. Türkiye started to prioritize minimizing the costs of the ongoing sources of tension and instability in its region by initiating an encompassing normalization/rapprochement process with a series of regional actors. Economic considerations arguably played a role in the normalization/rapprochement initiatives, which constituted the practice of a peculiar version of the "trading state." Finally, Türkiye defined and performed a unique neutrality for itself within the framework of the war in Ukraine to mitigate the negative impacts of the war.

NORMALISATION/RAPPROCHEMENT

One of the most dominant themes of Turkish foreign policy in 2022 was undoubtedly the wide-scale normalization/rapprochement efforts Türkiye initiated with a number of regional players in MENA but also with Armenia. Türkiye's strained relations with Israel, Saudi Arabia, the United Arab Emirates (UAE), Egypt, and even Armenia have caused various problems at varying levels in line with the respective national capacities of each country in the region and the world. Thus, the normalization/rapprochement efforts by Tür-

“

“We reject impositions in foreign policy as we do in domestic politics. We develop relations with various regional organizations congruent to our strategic location conjoining three continents to advance Türkiye’s achievements further. We neither turn our back to the East for the sake of the West nor do we neglect the Middle East and North Africa while strengthening our relations with Nordic countries.”

”

Recep Tayyip Erdoğan

President of Türkiye

kiye are an attempt to overcome the problems and challenges either created or exacerbated by actors with whom Türkiye has been at loggerheads for a long time. Türkiye’s expectation from the ongoing normalization/rapprochement efforts is transforming some of the former “adversaries” or rivals into partners via sharing concrete and tangible stakes with them. Such endeavors include the prospects of building the gas pipeline between Israel and Türkiye to export Israeli gas to European markets as well as exporting and jointly producing Türkiye’s indigenous defense products with Saudi Arabia and the UAE. For those countries with which Türkiye cannot cultivate this level of constructive cooperation, Türkiye’s expectation is at least achieving their neutrality: a position from which they would not actively endeavor to undermine Türkiye’s national interests.

The whole normalization/rapprochement effort fits into the wider contemporary concept of Turkish foreign policy, which is about consolidating and preserving achievements in recent years through a different approach. This point is building the connection between Armenia, which is different regionally and temporally from other MENA countries that are subject to the same normalization/rapprochement effort of Türkiye. Despite sharing very few points with the said MENA countries, Türkiye’s normalization/rapprochement initiative toward Armenia followed the same pattern as other MENA countries: Türkiye came up with this initiative after having engaged in geopolitical struggles that involved active military interventions with most of these countries despite their nominal stark differences from one another. In all these geopolitical and

military struggles, Türkiye ensured at least its core interests and then launched the normalization/rapprochement process.

Despite being subject to different dynamics and calculations than the normalization/rapprochement process with the said countries, Türkiye also signaled its willingness to normalize its relations with the Syrian regime more than once in 2022. Türkiye's proposal for the formation of a trilateral mechanism consisting of Türkiye, Russia, and the Syrian regime to normalize the relations between Ankara and Damascus is likely a result of the ongoing Russian insistence, which Türkiye needs to cater to within the framework of the complex balance it maintains with Russia for the war in Ukraine. In addition, Türkiye's economic woes and the fact that it heads to national elections in June 2023 necessitate efforts to decrease the costs of the crises around Türkiye and concentrate on the issues of the highest significance. A potential normalization with Damascus would hypothetically allow Ankara to focus solely on the YPG threat.



Türkiye's economic woes and the fact that it heads to national elections in June 2023 necessitate efforts to decrease the costs of the crises around Türkiye and concentrate on the issues of the highest significance.

BACK TO TRADING STATE OR TRADING STATE 2.0

The discernible economic dimension of the ongoing normalization/rapprochement processes between Türkiye and its partners invokes the concept of a “trading state”, which was also used as a framework to explain Turkish foreign policy in the early 2000s. Although the ongoing normalization/rapprochement efforts are not solely driven by economic interests, they have a central role in at least some of the processes such as the ones between Türkiye and the UAE and Saudi Arabia. The temporal and sectoral overlap between the needs of these countries made turning a new page in relations possible. Türkiye's economic woes made securing the inflow of foreign funds and investments a top priority and conveniently Saudi Arabia and the UAE are resource-rich countries capable of delivering it. It is no coincidence that these are the two countries with which Türkiye has been able to either advance more in normalization/rapprochement or more tangible terms compared to Israel, Egypt, and Armenia with which the prospects and imminence of tangible economic cooperation are relatively more remote.

THE WAR IN UKRAINE

Türkiye came to the forefront not only at regional but also global levels due to its foreign policy activism before and during the war in Ukraine. Türkiye raised its diplomatic profile by achieving ground-breaking outcomes such as gathering the foreign ministers of Ukraine and Russia in Türkiye while the fighting was raging on and brokering the “Grain Deal,” whose impacts reach far beyond the immediate environment of the war, between parties in cooperation with the United Nations (UN). Türkiye owes its unique position in the war to its ability to talk to both sides, which is not an accidental outcome but rather the outcome of years-long deliberate investments in its relations with both Kyiv and Moscow. Türkiye’s neutrality in the war is also an extension of the indispensability of its relations with both sides to the extent that it could not afford to pick sides in the war. As such Türkiye employs a complex balancing act at multiple levels. If Türkiye’s cordial relations with both Kyiv and Moscow are one source of credibility in the eyes of both sides, the other important source is Türkiye’s autonomy and its national capacity. Thanks to its increased strategic autonomy over years, Türkiye is now capable of crafting policies independent of its Western allies and resisting heavy pressures by taking the risk of escalation with them for its policy choices. Furthermore, Türkiye is also capable of employing “sticks” and hurting its counterparts as in the cases of supplying Bayraktar drones and ammunition to Ukraine and blocking the passage of Russian warships from the Turkish Straits by invoking the Montreux Convention.

Overall, the Russian invasion of Ukraine transformed the very nature of the regional and international status quo, which was created after the Cold War, and forced the actors to reformulate their strategic orientation. One of the strategic consequences of the war in Ukraine for Türkiye is the emergence of a new geopolitical reality forcing the latter to recapitalize its geopolitical position, rebalancing its place within NATO vis-à-vis Europe and the U.S., and reorient itself in the emerging European security and defense architecture.

2023: A GEOPOLITICAL SHIFT OR THE CONSOLIDATION OF ITS STRATEGIC POSITION?

Türkiye’s complex balancing act in the war is not peculiar to the war in Ukraine, but a part of a much wider strategic and geopolitical orientation to ensure first its strategic autonomy and second, diversity in its geopolitical portfolio. Türkiye’s long-term search and practice of balancing its relations with the West in general with more pragmatic, issue-based, and practical cooperation relations

with non-Western countries stand to persist in 2023, too. In line with this orientation and the expected continuation of the war in Ukraine, Türkiye should be expected to maintain its current balancing and neutrality policy in 2023. Depending on the complex dynamics of the war, ranging from great power politics and nuclear brinkmanship to economic and logistical considerations of war-making, certain opportunities for de-escalation and even new rounds of negotiations might arise in 2023, and Türkiye would lead and take the initiative at those opportunities.

Türkiye's "trading state" potential in regulating its foreign relations is also likely to persist in 2023 since its economic woes are not ones to be overcome in the short term. Moreover, since the world economy is still reeling from the heavy costs of the global pandemic and there is an expectation of a global recession in 2023, economic considerations will occupy a central place for almost all countries beyond Türkiye.

In line with this economic outlook, the ongoing normalization/rapprochement process between Türkiye and its partners should also be expected to continue and probably deepen in 2023 since the very conditions facilitating the launch of the process in the first place will still be around in 2023.

As a relatively new component of Turkish foreign policy, the defense industry will continue its unabated rise in 2023 as it did in 2022. As a strategic sector, advancements in Türkiye's indigenous defense industry have ramifications beyond the defense industry. Türkiye has seized momentum in expanding its export markets for defense products both in quantity and quality, which has already begun to be dubbed as "drone diplomacy" or "defense diplomacy." The war in Ukraine considerably diminished Russia's capacity to export defense products to a lot of countries and Russia's capacity will be further diminished in 2023 as the war will drag on next year, too. Türkiye is set to fill the vacuum created by Russia in especially Asia, the Middle East, Africa, and Latin America, which will boost Türkiye's existing relations and also help cultivate new ones with new export partners.

Türkiye's counterterrorism (CT) efforts both within and beyond Türkiye will also continue in 2023. In 2022, Türkiye's counterterrorism operations gained further depth, especially in northern Iraq; however, Türkiye's operational and strategic goals have not been fully achieved yet. Therefore, Türkiye is likely to attempt to complete the ongoing CT missions in northern Iraq and also to continue its precision strikes against designated leaders of the PKK terrorist group's Syrian wing, the YPG, and its members in northern Syria. Since the YPG threat is still a kinetic one for Türkiye as showcased by the bombing attack in Istanbul, a cross-border military operation

by Türkiye against YPG-controlled territories in northern Syria will be in the cards in 2023.

In 2023, the most important issue in Türkiye-U.S. relations will be the export of the new batch of F-16 fighter jets and modernization kits to Türkiye, which is being stymied by U.S. Senate Foreign Relations Committee Chair Robert Menendez. Türkiye's expected cross-border military operation against the YPG in northern Syria also runs the risk of straining the bilateral relations. Depending on Biden's preferred course of action in the run-up to the Turkish presidential elections in 2023, Turkish domestic politics might also be a source of tension between the two countries if Biden embraces an openly anti-Erdoğan stance as he did during his own election campaign.

In Türkiye-Greece relations, there is a high probability of escalation over the Aegean and the maritime zones in the Eastern Mediterranean. The conflict between the Greek claim on Crete's alleged maritime zone and Turkish-Libyan bilaterally demarcated exclusive economic zones might cause a standoff between Türkiye and Greece in 2023 since the latter has already contracted the area to major energy companies for exploration of hydrocarbons. With both Turkish and Greek elections in the mid of 2023, diplomatic and geopolitical maneuverability to de-escalate and third-party intervention will be limited. Plus, Türkiye-Greece bilateral tensions have become a dynamic in Türkiye-U.S. relations, as well. Thus, there is a distinct possibility that Türkiye-U.S. relations will also be affected by the tensions in Türkiye-Greece relations in 2023.

In Türkiye-Azerbaijan relations, further consolidation of the strategic nature of the bilateral relations must be expected in 2023. Türkiye will continue to support Azerbaijan in developing and stabilizing the newly liberated Karabakh region and continuing military cooperation. Türkiye will also concentrate its efforts to prevent any further military escalation between Azerbaijan and Armenia.

The trajectory of Türkiye's relations with Azerbaijan in 2023 will also have wider energy geopolitics implications. Whether or not Putin's proposal to turn Türkiye into an energy hub will materialize, the existing energy corridor from Azerbaijan to Europe via Türkiye is likely to be upgraded in terms of its capacity with a possible buy-in from Turkmenistan, too.

The war in Ukraine will drag on in 2023 and maintain its central place in Türkiye's agenda, too. Türkiye will continue its efforts to periodically renew the grain deal by capitalizing on its influence on both Kyiv and Moscow. Türkiye will also seek any opportunity for de-escalation and the resumption of the peace talks between the parties throughout 2023.

The dominant agenda in the Middle East will be the ongoing normalization/rapprochement efforts between many countries in 2023. The greatest risk for the continuation of the normalization/rapprochement efforts in the region will be the new Israeli government, which harbors the most extreme right-wing elements to date. A serious escalation in East Jerusalem and Gaza might put both the “Abraham Accords” and the Türkiye-Israeli normalization/rapprochement process to the test.

In North Africa, Türkiye's main interest will be in Libya. Türkiye and Libya might ramp up their cooperation in the exploration and production of hydrocarbons not only for consolidating their Eastern Mediterranean claims but also for seizing the opportunity to address Europe's energy needs more as Algeria already appeared as an alternative source for Europe's energy needs. Türkiye and Algeria might also build on their existing cooperation in the energy sector in 2023 for the dual purpose of meeting both Türkiye's and Europe's energy demands.

The most dominant agenda in Türkiye's relations with Africa has been the former's defense exports to the latter. Türkiye's share in many African countries' defense imports will likely increase with the addition of new countries to the existing customers in 2023. Russia's partial withdrawal from the African defense market due to its stretch in the war in Ukraine will boost Türkiye's export capacity.

The geopolitical, foreign policy, and security issues that are highly likely to be of the highest significance for Türkiye in 2023 are analyzed in greater detail in exclusive chapters, each by different authors. Murat Yeşiltaş analyses Türkiye-U.S. relations with reference to the dominant dynamics during 2022 and how they will evolve in 2023; Muhammet Koçak analyses Türkiye-Russia relations especially within the framework of the war in Ukraine; Murat Yeşiltaş and İsmet Horasanlı analyse the risk factors facing the Middle East and its potential impact on Türkiye; Kutluhan Görücü analyses the Syrian issue with references to the likelihood of a military operation by Türkiye and a thaw between Ankara and Damascus; Murat Aslan analyses the main dynamics in the Eastern Mediterranean and the potential areas of flare ups in 2023; Hacı Mehmet Boyraz discusses the future of Türkiye-EU relations by especially pointing out energy and defence as potential areas of cooperation; Tunç Demirtaş highlights the most important areas and developments in Türkiye-Africa relations throughout 2022 and shares his expectations on those areas for 2023; Rıfat Öncel reviews the most important developments in Türkiye's defense industry in 2022 and predicts the highest profile developments as well as likely export projects in 2023; and finally Sibel Düz analyses Türkiye's counterterrorism efforts within and outside Türkiye with reference to Türkiye's indigenous tech-

nologies' impact on these efforts in 2022 and accordingly forecasts how these efforts will evolve in 2023.

The 2023 presidential election comes as the Republic of Türkiye enters its second century. The geopolitical and security landscape of Türkiye will be competitive and restrictive, and there will be competing geopolitical narratives concerning Türkiye's strategic orientation for the second century. 2023 will be a prelude for the country's second century not only for domestic politics but also for Türkiye's regional and global strategic reorientation.

TURKISH-AMERICAN RELATIONS: THE GEOPOLITICS OF MUTUAL UNCERTAINTIES



Murat Yeşiltaş

02



SUMMARY OF 2022

- 1 The compromise reached between the U.S. and Türkiye on the sale of F-16 aircraft has been one of the most positive developments in bilateral relations.
- 2 Türkiye and the U.S. launched a strategic mechanism to increase cooperation, a development that brought the economy to the forefront of bilateral relations.
- 3 The Russian-Ukrainian war stood out as an issue that was included in Turkish-American relations, and although there were differences, the two countries did not experience any significant tension.
- 4 The U.S.' constant support for the YPG and Türkiye's fights against the YPG continues to be one of the structural problems in bilateral relations.
- 5 The tension in Turkish-Greek relations has the potential to affect Turkish-American relations.

In recent years, the divergence between Türkiye and the U.S. has continued to increase while the common ground has continued to diminish. Although the arrival of U.S. President Joe Biden to the White House was generally expected to have a negative impact on bilateral relations, no major event occurred in 2022 that would have worsened relations. However, problems between the two countries persist. 2022 can be considered a year in which the previous disagreements on regional and global issues persisted, but potential areas of cooperation were also actively assessed. However, Russia's invasion of Ukraine on February 24, 2022, led to a comprehensive security crisis on a regional and global scale and affected the dynamics in Turkish-American relations, which have followed an untabled process in recent years. While Russia's aggression in Ukraine threatened European security in a way not seen since World War II, Ankara's rejection of Russia's invasion attempt, its closure of the Istanbul and Dardanelles straits in accordance with the Montreux Convention, its efforts for a diplomatic solution, and especially its contribution to the signing of the Black Sea grain corridor agreement were welcomed in Washington. The fact that Russia's aggression threatened NATO countries clearly demonstrated the importance of NATO in terms of security, while Türkiye's geopolitical position and its relationship with Moscow brought Türkiye's critical role in the alliance to the forefront. It is possible to say that this situation has had a positive impact on Turkish-American relations.

In 2022, one of the most tangible developments in Turkish-American relations was the frequency of dialog between high-level officials. President Recep Tayyip Erdoğan and U.S. President Joe Biden had the opportunity to meet face-to-face twice, the first time at the NATO Leaders Summit in Madrid and the second at the G-20 Leaders Summit in Bali. In addition to the meetings held at the leaders' level, many meetings were held between the foreign ministers and defense ministers. In addition, delegation talks on various issues were also emphasized.



**Mutual ambiguity
in Turkish-American
relations has been the main
pattern during 2022.**

In 2022, the dynamics in Turkish-American relations continue to be the same, but some new elements have become increasingly evident in bilateral relations. In this respect, the defense cooperation agreement between Greece and the U.S. has become a prominent issue for Türkiye, while Türkiye's policy on the war in Ukraine has become a new and important dynamic. On the other hand, Türkiye's position on Sweden and Finland's NATO membership has emerged as a tense element in Turkish-American relations. However, the YPG issue in Syria remains a problem between the two countries, and the lack of progress on this issue remains the most important problem in relations. Cooperation in the defense industry is far from the desired level. Overall, the mutual ambiguity in Turkish-American relations has been the main pattern during 2022.

MAIN DYNAMICS IN TURKISH-AMERICAN RELATIONS

Russia-Ukraine War: Common understanding, different policy

In 2022, one of the most important developments affecting Turkish-American relations was Russia's invasion operation against Ukraine on February 24. While the U.S. and Europe adopted a new and harsher policy toward Russia in the face of Russia's revisionist move, Türkiye preferred to follow a balanced policy. Ankara, on the one hand, condemned Russia's aggression, and on the other hand, pursued an anti-occupation policy within the framework of the United Nations and NATO, and at the same time took a critical initiative in terms of the course of the war by closing the Turkish Straits to Russian and Ukrainian warships. The provision of TB2 armed drones to Ukraine also strengthened Ukraine's defenses against Russia and prevented Russia from achieving a quick victory in the first phase of the war.¹ However, Türkiye has been engaged in an intensive diplomatic effort to end the war since the beginning of the crisis, notably resolving the food security crisis, mediating the prisoner swap, and Erdoğan's close contact with Russian President Vladimir Putin and Ukrainian President Volodymyr Zelenskyy strengthened Türkiye's position throughout the war.

¹ Maya Carlin, "How to Turkish-made TB2 drone gave Ukraine an edge against Russia", *Business Insider*, September 18, 2022, <https://www.businessinsider.com/how-turkish-baykar-tb2-drone-gave-ukraine-edge-against-russia-2022-9>

In terms of Turkish-American relations, the developments caused by the Russian-Ukrainian war have emerged as a new and important dynamic in both bilateral relations and Türkiye-West relations. The war recapitalized Türkiye's geopolitical position and reinforced its stance as a main diplomatic player for Europe and the United States. Russia's aggression against Ukraine has disrupted the post-Cold War geopolitical status quo and has shown that the European security architecture is once again under threat from Russia. NATO's new strategic document of 2022 re-defines Russia as a traditional military threat, while the abandonment of the post-Cold War "dual-track" policy toward Russia has made Türkiye's role in NATO important again. On the other hand, the newly emerging dynamics regarding the security of the Black Sea in the aftermath of the war in Ukraine could emerge as a strategic issue in Turkish-American relations. Although there is a difference between the U.S. and Türkiye on this issue, the changing balance of power in the Black Sea and Russia's offensive policies show that the Black Sea is becoming a new issue and an active region in Turkish-American relations. As a whole, Russia's intervention in Ukraine not only affected the regional security architecture but also introduced a new strategic dimension to Turkish-American relations.

At the diplomatic level, Türkiye's close contact with Russia throughout the war was a process supported by Europe and the United States. The most important pillar of Türkiye's balanced policy has been the intensification of dialogue with Russia, which has enabled Türkiye to establish new influence in the eyes of the United States. Indeed, Türkiye's role in the Grain Corridor Agreement on food security was portrayed as a great success. Welcoming the agreement, the Biden administration expressed its appreciation for Türkiye's intensive and meticulous efforts and supported Ankara's initiatives. In a face-to-face meeting with Erdoğan on the margins of the G-20 summit, President Biden thanked Erdoğan for his contribution to the extension of the agreement.² Russia's return to the agreement with Ankara's mediation and its acceptance of the extension of the agreement was seen as an indicator of Türkiye's growing influence.³

Another dimension of the Russian-Ukrainian war is the economy, which has emerged as a new dynamic in Turkish-American relations. Although Washing-

2 "Readout of President Biden's Meeting with President Recep Tayyip Erdoğan of Türkiye," *The White House*, November 15, 2022, <https://www.whitehouse.gov/briefing-room/statements-releases/2022/11/15/readout-of-president-bidens-meeting-with-president-recep-tayyip-erdogan-of-turkiye/>

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

ton did not welcome Türkiye's policy that differed from the U.S. and Europe regarding the sanctions imposed on Russia, the fact that there was no overt pressure on Türkiye on this issue points to the importance of Türkiye's role during the war. However, the fact that the United States has announced that it is closely monitoring the growing economic relations between Ankara and Moscow and has sent delegations to Türkiye and held a series of meetings to ensure that the sanctions imposed on Russia are not violated indicates that there may be a problem between the two countries on this issue.⁴ However, in 2022, there were no developments that would deeply affect bilateral relations on this issue, and Türkiye made some changes to prevent the emergence of problems, especially in the banking system.

Another economic issue that brought Türkiye to the forefront of the Ukraine crisis is energy. The energy supply security caused by the economic sanctions against Russia and the war has proved that Türkiye is once again a critical country for the transfer of energy. In terms of a new energy supply security policy to reduce Europe's dependence on Russian natural gas, the fact that Turkmenistan's gas will allow more gas to be transported to Europe via Azerbaijan and Türkiye via the Caspian Sea has reinforced Ankara's position in energy geopolitics, which has positively reflected on Turkish-U.S. relations as a new strategic issue.

In conclusion, the Russia-Ukraine war has added a new strategic dimension to Turkish-U.S. relations, and this dimension will continue to increase.

Turkish-Greek Geopolitical Rivalry: A Lack of Mutual Trust

Turkish-Greek relations, which do not exist as a major problem in Turkish-American relations, the tensions between Ankara and Athens in 2022, the concrete repercussions of Greece's renewed defense and security agreement with the United States, and the U.S. decision to lift the arms embargo on the Greek Cypriot administration point to the emergence of a new insecurity dynamic in Ankara-Washington relations. In this sense, one of the most potentially influential factors in Türkiye-U.S. relations is Greece's increasingly provocative attitude toward Türkiye and Washington's policy toward it.

In addition to the long-standing problems between Türkiye and Greece such as the continental shelf, airspace, the process of arming non-military islands, the Cyprus issue, energy competition in the Eastern Mediterranean, and Athens' aggressive armament policy, the strategy of escalation pursued by the Mitsotakis government for domestic political concerns has increased the rivalry

⁴ "Assistant Secretary Elizabeth Rosenberg's Visit to Türkiye," U.S. Department of the Treasury, October 19, 2022, <https://home.treasury.gov/news/press-releases/jy1036>

between Ankara and Athens in recent years. The United States' extension of the Mutual Defense Cooperation Agreement with Greece, lifting the arms embargo on the Greek Cypriot administration, increasing its military presence in Greece, and providing arms aid are among the main developments that raise concerns for Ankara. This concern will inevitably lead to a change in Türkiye's policy toward Greece and this issue will become one of the main dynamics of Turkish-American relations.

There are several reasons why Greece has once again become a dynamic in Turkish-American relations. The first one is that Athens is trying to take advantage of the S-400 and F-35 crises between Türkiye and the U.S., the growing discontent in Congress with Türkiye, and the Biden administration's distant stance toward Ankara, and is trying to balance its weakening position in the regional balance of power with the support of the U.S.⁵ Although this situation is used as an opportunity by Greece, the U.S. decision to increase its military presence in Greece is seen by Ankara as part of its strategy to balance Türkiye. Therefore, the current atmosphere of the lack of trust in Turkish-American relations is deepening, and the strategic ambiguity of the U.S. is turning into an issue of criticism for Ankara.

The second issue is that Greece, on the one hand, is trying to prevent the sale of F-16s to Türkiye, and on the other hand, it is engaged in activities that increase tensions by placing the donated weapons it obtained from the U.S. on the islands. At this point, the attitude of the Biden administration and Congress in favor of Greece is seen as a security problem for Türkiye due to the armament of the islands, which transforms the Turkish-Greek tension from a political and diplomatic issue into a strategic national security problem. The transformation of Turkish-Greek relations and rivalry into a problem in Turkish-American relations stems from the deepening mutual mistrust.

F-16: Beyond A Fighter Jet

One of the positive developments in Türkiye-U.S. relations was the removal from the U.S. National Defense Authorization Act for Fiscal Year 2023 (NDAA) of provisions that could block the sale of 40 F-16s and 80 modernization kits that Türkiye had requested from the U.S.⁶ The sale of F-16s to Türkiye has emerged as one of the most serious disagreements between President Biden and the Democrats in Congress on foreign policy, with Biden

5 Rifat Öncel, *Greece Unlikely Compellence: Air Force Modernization & Diplomatic Assertiveness*, SETA Report, No 191, 2021, <https://setav.org/en/assets/uploads/2021/09/R191-Greece.pdf>

6 "Conditions on F-16 sales to Türkiye dropped from US NDAA bill", Daily Sabah, October 11, 2022, <https://www.dailysabah.com/business/defense/conditions-on-f-16-sales-to-turkiye-dropped-from-us-ndaa-bill>,

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“The U.S. does not act fairly regarding NATO member states. Both Greece and Türkiye are NATO member states and Türkiye is in the top five in terms of its contributions to the bloc. ... Our expectation from the U.S. is not to involve Greece in wrong calculations and not allow the manipulation of international public opinion.”

”

Recep Tayyip Erdoğan

President of Türkiye

approving the sale while some Democratic senators and congressmen voiced their objections. However, the fact that the Biden administration stated that it would support Türkiye in securing the sale prevented the expected breakdown in Turkish-American relations. In parallel with Biden, the U.S. State Department's support for the sale at least made the White House administration more decisive vis-à-vis Congress.⁷

The fact that the F-16s, unlike the F-35, do not have any potential for incompatibility with the S-400 systems and that Türkiye has been using these aircraft for a long time is one of the factors that facilitate the realization of this sale. The fact that Washington, which advocates keeping the capacity of the NATO alliance strong, sees supporting Türkiye's capacity with the sale of F-16s as a contribution to NATO's strength strengthens the idea that this sale can be realized. In the face of the U.S. administration's stance, Türkiye's effective use of defense diplomacy on the F-16 issue transformed the issue from a crisis into an opportunity for cooperation. Therefore, the F-16 sale has the potential to become a new problem area in Türkiye-U.S. relations, but it also creates an opportunity to show that Washington takes Ankara's security concerns seriously.

YPG: A Hopeless File

Perhaps the most important factor negatively affecting Türkiye-U.S. relations is the U.S.' continued support for the YPG, the Syrian branch of the PKK terrorist group, which plays a key role in the structure of the Syrian Democratic Forces (SDF). While the differences on this issue continued throughout 2022,

⁷ Ned Price, “Department Press Briefing,” U.S. Department of State, December 7, 2022, <https://www.state.gov/briefings/department-press-briefing-december-7-2022/#post-402022-TÜRKİYE>

the U.S. did not change its policy of supporting the YPG; on the contrary, it provided military training and arms support, while politically supporting the autonomous organization of the YPG-PYD in eastern Syria. Nevertheless, the Washington administration did not object to Ankara's targeting of the terrorist organization's leaders and its logistics capacity in some operations. However, Türkiye's targeting of YPG elements in a large area within the scope of Operation Claw-Sword in November 2022 showed that there was no change in Turkish-American relations regarding the YPG.

While Washington has demanded that Türkiye limit its military mobilization to airstrikes, Ankara's ground operation would undermine the fight against Daesh in Syria. As the uncertainty about Türkiye's ground operation increased, the United States again showed more images of YPG elements and sent a message that it would oppose Türkiye's military operation against YPG elements east of the Euphrates.⁸

Türkiye, on the other hand, has said that the U.S. has warned allied countries against supporting the terrorist organization PKK/KCK/YPG for any reason whatsoever, including under the pretext of fighting Daesh, in response to U.S. calls for Türkiye to refrain from its planned ground operation. The ongoing clash of strategies on this issue shows that developments in this sensitive region continue to create a fragile space in Turkish-American relations and deepen the problems in the trust relationship.



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Sweden and Finland NATO Membership Process

Another dynamic of the Russian-Ukrainian war that affected Turkish-American relations in 2022 was the post-war NATO membership of Sweden and Finland. Although Türkiye's objection to the NATO membership of the two countries due to the free environment they provided for the activities of the PKK terrorist organization in their countries and their support for the PYD in Syria is handled in the context of bilateral relations and NATO, this situation has also become a key dynamic of Turkish-American relations. Although Türkiye's objection seemed to be a problem in terms of the U.S. pursuing

⁸ Dan Lamothe, Louisa Loveluck, "U.S. troops to expand patrols in Syria despite tension with Türkiye," The Washington Post, December 6, 2022, <https://www.washingtonpost.com/national-security/2022/12/06/Türkiye-kurds-syria-us-troops/>, (

a decisive policy regarding the fast-track approval process, the Washington administration preferred to deal with the process in the context of a solution within NATO. Washington has refrained from politically lobbying Ankara on the possible membership of these two countries, leaving this issue to be negotiated between Türkiye and the candidate countries, as it is aware that the terrorism issue will bring the U.S. support for the YPG back to the agenda. At this point, Türkiye's principled opposition to NATO enlargement and Sweden and Finland's membership played a positive role, while Sweden and Finland have understood Ankara's legitimate security concerns and acted in a solution-oriented manner.

NATO's historic Madrid summit led to important decisions⁹ on this issue, with NATO Secretary-General Jens Stoltenberg expressing Türkiye's legitimate security concerns about terrorism,¹⁰ which was supported by the Washington administration.

A memorandum of understanding was signed in Madrid on June 28 between Türkiye, Sweden, and Finland.¹¹ The Biden administration congratulated¹² Türkiye, Sweden, and Finland for signing the trilateral memorandum and the administration supported this process.¹³ Thus, this issue did not create a new problem area in Turkish-American relations, but by bringing the U.S. support for the YPG back to the agenda, albeit indirectly, it showed that the structural problems in Turkish-American relations will always be on the agenda.

2023: CONTINUATION OF MUTUAL UNCERTAINTY

As in the past, the main dynamics that will affect possible developments in the upcoming period will continue to be shaped at the global, regional, and bilateral levels. One of the most critical issues in this context is Russia's ongoing war in Ukraine. Although not directly a subject of Turkish-American

9 "NATO allies should unite against common threats, Kalin tells Sullivan," *Daily Sabah*, June 23, 2022, <https://www.dailysabah.com/politics/diplomacy/nato-allies-should-unite-against-common-threats-kalin-tells-sullivan>

10 Monika Pronczuk vd., "Representatives from Finland and Sweden meet with Turkish officials to discuss NATO membership," *New York Times*, June 21, 2022, <https://www.nytimes.com/live/2022/06/19/world/ukraine-russia-news#the-leaders-of-finland-and-sweden-will-meet-with-turkish-officials-to-discuss-nato-membership>

11 "Trilateral Memorandum," NATO, June 28, 2022, https://www.nato.int/nato_static_fl2014/assets/pdf/2022/6/pdf/220628-trilat-memo.pdf

12 President Biden, Twitter, June 28, 2022, <https://twitter.com/POTUS/status/1541870929373970437?s=20&ct=x7PMMo0hvh-IT2JJOZYObQ>

13 Brad Dress, "Sullivan: 'We will not tolerate any aggression' toward Sweden, Finland during NATO process," *The Hill*, May 18, 2022, <https://thehill.com/policy/international/3493709-sullivan-we-will-not-tolerate-any-aggression-toward-sweden-finland-during-nato-process/>

relations, the war may lead to regional and global developments. It may be possible to talk about a few scenarios in this context. The first is the scenario in which the war continues. As the scope of U.S. military aid to Ukraine expands, the likelihood of the war continuing is very high. The second is a scenario in which a ceasefire is declared, the war stops, and negotiations for a new agreement are launched. Such a scenario is unlikely to materialize given the negotiating positions of the Russian and Ukrainian sides and the current positions of the U.S. and the West. The third scenario is a deepening and escalation of the war to a more violent level. Although Ukraine does not have the military capacity to withdraw from all Russian-occupied territories, the nature of the military assistance from the West and Russia's poor military performance on the ground and facing the possibility of a defeat could lead to an escalation of the war. However, such a situation does not seem highly likely in the short term. Depending on all three scenarios, there may be a change in Turkish-American relations.

The fact that Türkiye is a member of NATO and has the second most powerful army in the alliance shows that the U.S. is likely to keep relations with Türkiye on a more manageable and sustainable course in a period when the Russian threat is felt under the NATO umbrella. In this context, Türkiye's geopolitical position seems to be much more valuable for the U.S. in the coming period when tensions are likely to turn into concrete conflicts, preventing the deepening of the crisis areas in the relations.

The Turkish-Greek rivalry, which has an increasing potential to affect Turkish-American relations, may become tenser in the first six months of 2023. There is a risk of this tension turning into a conflict due to the hardening of the political rhetoric of the parties, the fact that both countries are heading toward elections, and Greece's military posture on the islands to the extent that Türkiye's security is at risk. Therefore, Turkish-American relations are likely to be negatively affected by this tension. In this context, the U.S. should be expected to consolidate and increase its military power in Greece. This situation shows that the tension will not only be limited to Türkiye and Greece but may also escalate between Ankara and Washington. Therefore, depending on the way the Turkish-Greek tension escalates in 2023, U.S.-Türkiye relations should also be expected to see a harsher atmosphere.

On the other hand, Sweden's and Finland's NATO membership could be positively affected if these two countries continue to take steps to address Türkiye's security concerns. However, for this process to be fully clarified, the presidential and parliamentary elections in Türkiye should be awaited. On the other hand, in the context of bilateral relations, no change should be expected in the U.S. relationship with the YPG. Since the U.S. is not expected to change its

strategy through Türkiye's diplomatic efforts, Türkiye's gradual military operations against the YPG in the first half of 2023 or a possible compromise between Russia, Türkiye, and Syria may push the YPG 30 kilometers (19 miles) beyond the Turkish border. However, a military operation against the YPG in the areas west of the Euphrates is a stronger possibility. Although such a military operation would conjecturally lead to mutual statements in bilateral relations, Turkish-American relations should not be expected to enter a structural crisis. An extraordinary development in the F-16 issue in 2023 seems unlikely, but the Washington administration's supportive attitude toward the process is expected to continue.



Türkiye's geopolitical position seems to be much more valuable for the U.S. in the coming period when tensions are likely to turn into concrete conflicts, preventing the deepening of the crisis areas in the relations.

The year 2023 may be relatively calm in Turkish-American relations. As a general trend, there will be a tendency to resolve existing crises in Turkish-American relations if possible and to prevent further deepening or managing existing problems if they cannot be resolved. In this respect, it can be expected that the tension in bilateral relations will continue to be kept at a sustainable level. However, developments in the Middle East and the normalization process contribute to a positive agenda in Turkish-American relations. If this situation is expected to continue in 2023, it may be possible for both capitals to reach a consensus on joint work files.

On the other hand, there is a high probability that the rhetoric toward the U.S. in Türkiye will be harsh in the period before the 2023 elections.

TÜRKİYE AND EUROPE: NEW OPPORTUNITIES IN THE SHADOW OF WAR



Hacı Mehmet Boyraz

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SUMMARY OF 2022

- 1 President Erdoğan attended the first meeting of the European Political Community that was organized for the first time upon the invitation of French President Emmanuel Macron.
- 2 Türkiye made the first delivery of Bayraktar TB2 to Poland.
- 3 The European Council extended its sanctions against Türkiye for one year due to its hydrocarbon exploration and drilling activities in the Eastern Mediterranean.

The war that started between Russia and Ukraine in February 2022 gave a brief break to the ongoing political tension between Türkiye and (especially Western) European countries. In a period dominated by the fear of Russian violent expansionism over Europe, Türkiye has become the country that has established the strongest dialogue with Russia. As a result of this, Europe's approach to Türkiye has changed and new cooperation opportunities have emerged between the two sides. In terms of bilateral relations, the relative normalization of Türkiye's relations with European countries, where it had experienced high tensions in previous years, is among the results of this situation. This study takes the current picture of Türkiye's relations with Europe, which has always had an important place in its geopolitical trajectory, and provides a brief projection of what Türkiye-Europe relations await in 2023.

EUROPE'S SECURITY CONCERNS AND TÜRKİYE'S PIVOTAL ROLE

The attack launched by Russia on Ukraine on February 24, 2022, is a critical development that increases Türkiye's strategic importance in the eyes of European countries. Because, after the start of the war, the debate on who would assume the role of mediator between the parties for European countries arose. In an environment of uncertainty where the great powers of the continent could not take any initiative, Türkiye came to the fore as a rational actor that succeeded in establishing a balanced relationship with Russia and Ukraine. As a matter of fact, Türkiye's success in bringing together Russian and Ukrainian representatives in Antalya and Istanbul attracted the attention not only of Europe but also of the whole world.

Türkiye has become the country that has adapted itself to the new geopolitical order the fastest by determining the most suitable position for



Türkiye carries out a fully independent foreign policy, acting according to its own values and national interests, in line with its strategic autonomy approach.

its own interests. Despite the war, the fact that Türkiye never closed the channels of dialogue with these two countries, and President Recep Tayyip Erdoğan's relationship with Russian President Vladimir Putin and Ukrainian President Volodymyr Zelenskyy based on mutual trust are the most important reasons for Türkiye's ability to build a balanced policy in a short time. So much so that Putin's following expression indicates exactly this

situation: "*President Erdoğan is a consistent and reliable partner.*"¹

More importantly, Türkiye took the initiative again in the summer when the world was facing a food crisis and brought the parties of the war together once again. As a result, the grain agreement was signed in Istanbul on July 22. Subsequent developments show how rational Türkiye's balance policy is and how effective it has become in solving international issues. The statement made by President Erdoğan at the press conference after the European Political

Community Summit in Prague, "The developments reveal the fact that Türkiye is a key country for the EU and Europe" points to this reality.² However, the fact that Türkiye came to the fore in this process especially disturbed France. French President Emmanuel Macron expressed this discomfort, saying, "I don't want the Chinese and Turks to be the only ones negotiating the day after."³

After the start of the war, Russian national security concerns for European countries reached their highest level. The fear that Russia's invasion would not be limited to Ukraine and perhaps spread to the whole continent has led to unease in especially Eastern European and Scandinavian countries. The fact that Finland and Sweden, which have pursued an impartial foreign policy since their establishments, made a strategic decision following the outbreak of the war and applied for NATO membership, is a result of this uneasiness.

1 "Putin Hails Türkiye's Erdoğan as Strong Leader", Reuters, <https://www.reuters.com/world/putin-hails-Turkey-Erdogan-strong-leader-2022-10-27/> (Accessed: December 23, 2022).

2 "The Developments Reveal the Reality that Türkiye is a Key Country for the Union and Europe", Presidency of Türkiye, <https://www.tccb.gov.tr/haberler/410/140021/-yasanan-gelistmeler-turkiye-nin-birlik-and-the-key-for-europe-eyes-the-fact-is-a-country->, (Accessed: December 23, 2022).

3 "Macron on Ukraine: I don't Want the Chinese and Turks to be the Only Ones Negotiating the Day After", Le Monde, https://www.lemonde.fr/en/international/article/2022/12/22/macron-on-ukraine-i-don-t-want-the-chinese-and-turks-to-be-the-only-ones-negotiating-the-day-after_6008711_4.html, (Accessed: December 23, 2022).

Türkiye, on the other hand, opposes the memberships of Finland and Sweden because they allow PKK and Gülenist Terror Group (FETÖ) activities in their countries. In this way, Türkiye carries out a fully independent foreign policy, acting according to its own values and national interests, in line with its strategic autonomy approach. The fact that Türkiye did not take part in the sanctions imposed on Russia by the European countries despite all the pressures is one of the results of this approach.

THE EUROPEAN POLITICAL COMMUNITY: A NEW POLITICAL FORMATION IN EUROPE

The Russian-Ukrainian war compelled European countries to shelve their problems and cooperate for collective security. At this point, there emerged an expectation that Europe should unify against the Russian threat since the EU is a militarily ineffective actor and NATO has come to serve only American interests. Accordingly, upon the call of French President Macron on May 9, the leaders of 44 countries, 27 of which were EU member countries, came together in Prague in October. The leaders of 44 European countries discussed the main problems of the continent, especially the Russian-Ukrainian war. Russia and Belarus were not invited to this formation, which is currently called the European Political Community (EPC).

With the approach of the Macron government, the current aim of the EPC is to promote dialogue between European leaders and security-oriented cooperation between European countries.⁴ In an environment where the trans-Atlantic ties between the U.S. and Europe have been weakening and the reason for NATO's existence has been questioned, it should not be surprising that France, which is the flag bearer of NATO skepticism in Europe, leads such a formation.

The question of whether the EPC is an alternative to the EU for Türkiye has come to the fore. However, the EPC does not offer Türkiye new paths. First of all, the EPC is not currently an official organization. Secondly, there are 16 other non-EU countries like Türkiye in the EPC. Indeed, at the press conference held after the summit in Prague, President Erdoğan said that the EPC is a timely initiative to address the problems on the continent and to produce joint solutions but it is not an alternative to the EU.⁵

4 "The European Political Community", European Parliament, [https://www.europarl.europa.eu/RegData/etudes/ATAG/2022/733704/EPRS_ATA\(2022\)733704_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/ATAG/2022/733704/EPRS_ATA(2022)733704_EN.pdf), (Accessed: December 23, 2022).

5 "The Developments Reveal the Reality that Türkiye is a Key Country for the Union and Europe", Presidency of Türkiye, <https://www.tccb.gov.tr/haberler/410/140021/-yasanan-gelistmeler-turkiye-nin-birlik-and-the-key-for-europe-eyes-the-fact-is-a-country->, (Accessed: December 23, 2022).

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“If the EU is going to be a strategic actor, it must stop being the toy of the Greek-Greek Cypriot duo and take the required steps in its dealings with Türkiye.”

Mevlüt Çavuşoğlu

Minister of Foreign Affairs of Türkiye

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ITALY’S INTEREST IN TURKISH DRONES

Türkiye has so far sold unmanned combat aerial vehicles (UCAV) only to Poland, among the EU and NATO member countries. With the first delivery of six TB2s to Poland on October 28, 2022, Turkish-made UCAVs started to fly in the European skies. This development has also attracted the attention of other European countries. As a result of this, Italy is also interested in Turkish-made UCAVs. Regarding the subject, the Italian army referred to Turkish-made UCAVs in its plans published for the coming years.⁶ More importantly, there were reports that Italian Prime Minister Giorgia Meloni was interested in Turkish-made UCAVs during her meeting with President Erdoğan at the G-20 Summit in November 2022.⁷ Although there has been no concrete development on the subject so far, it is significant that Italy has a marked interest in Turkish-made UCAVs.

EU MEMBERSHIP PROCESS

The EU membership process is one of the main issues that Türkiye has focused on for more than half a century to stay in the European trajectory. In this regard, there have been no positive developments that could improve bilateral relations throughout 2022. Besides this, the European Parliament (EP) and the Council of the EU adopted negative decisions due to the issues related to the Cyprus and Eastern Mediterranean issues as well as domestic developments in Türkiye and Turkish foreign policy. Thus, it is mostly decided that

6 Ragıp Soylu, “What’s Behind Italy’s Interest in Turkish Drones?”, Middle East Eye, <https://www.middleeasteye.net/news/turkiye-italy-drones-interest-what-behind>, (Accessed: December 23, 2022).

7 “Türk SİHA’larına Bir Talip Daha: İtalya Başbakanı Meloni Erdoğan’dan Bizzat İstedi”, Yeni Şafak, December 14, 2022.

Türkiye-EU relations, where there has been a regression rather than progress for a long time, are an endless endeavor. As a matter of fact, President Erdoğan, in an interview he gave after attending the Shanghai Cooperation Organization (SCO) summit held in Uzbekistan in September 2022, stated that the EU was keeping Türkiye busy with political considerations and that Türkiye was now inclined toward different pursuits.⁸

Despite Ankara's efforts to keep its relations with the EU alive, it is noteworthy that the EU did not make a positive assessment of Türkiye's membership in the document titled "A Strategic Compass for a Stronger EU Security and Defence in the Next Decade" published in March and only referred to Türkiye as a partner country.⁹ In the Türkiye reports published by the EP in June and the European Commission in October, no reference was made to Türkiye's EU membership. However, the emphasis in the three aforementioned reports on the need to continue cooperation in the areas of common interest between the EU and Türkiye is quite remarkable. Based on this, it is understood that the EU has geopolitical concerns due to the Russian-Ukrainian war and is inclined to turn to joint projects with Türkiye in the upcoming period in order to overcome these concerns.



In the Türkiye reports published by the EP in June and the European Commission in October, no reference was made to Türkiye's EU membership.

EASTERN MEDITERRANEAN

The crisis regarding the exploration and drilling of hydrocarbon resources in the Eastern Mediterranean, which has adversely affected Türkiye-Europe relations in recent years, has receded. The most important reason for this is the game-changing move made by the U.S. in January 2022 regarding the Eastern Mediterranean Natural Gas Pipeline Project (EastMed), which is carried out by the Greek Cypriot administration, Israel, and Greece and supported by the EU, to transport the natural gas in the Eastern Mediterranean to Europe. Among the countries that support EastMed, the U.S. decided to withdraw its support from the EastMed project, which it believes is far from economically viable, carries risks that may harm the environment, and causes unnecessary

⁸ "President Erdoğan Speaks to American PBS Channel", Directorate of Communications, <https://www.iletisim.gov.tr/english/haberler/detay/president-erdogan-speaks-to-american-pbs-channel>, (Accessed: December 23, 2022).

⁹ "A Strategic Compass for a Stronger EU security and Defense in the Next Decade", Council of the EU, <https://www.consilium.europa.eu/en/press/press-releases/2022/03/21/a-strategic-compass-for-a-stronger-eu-security-and-defence-in-the-next-decade/>, (Accessed: December 23, 2022).

tension in the region.¹⁰ Therefore, during 2022, no development could seriously affect Türkiye's relations with European countries due to the Eastern Mediterranean issue. What is more, the U.S.' decision turned the political equation in the region in favor of Türkiye.

Council of the EU, on the other hand, extended the low-impact sanctions it imposed on Türkiye for hydrocarbon exploration and drilling activities in the Eastern Mediterranean, with a decision made on November 11, 2022, due to the demand of the Greek Cypriot administration.¹¹ Such decisions, reflecting the institutional strategic short-sightedness of the EU, damage the already fragile Türkiye-EU relations and cause Türkiye to move further away from the EU trajectory. From this point of view, the EU, on the one hand, imposes sanctions on Türkiye due to the artificial crises in the Eastern Mediterranean and does not offer a concrete membership perspective to Türkiye, and on the other hand, opposes Türkiye's increasing cooperation with alternative blocs such as the SCO, displaying an irrational approach within itself. The following determination made by Prince Michael of Liechtenstein in his article titled "The Risks of Ignoring Türkiye" published on December 13, 2022, is significant: "The West refuses to acknowledge that Türkiye has strategic interests of its own in the Eastern Mediterranean, and in doing so risks alienating a crucial ally."¹²

PROSPECT FOR 2023

Based on the new geopolitical order shaped in the shadow of the Russian-Ukrainian war, military cooperation between Türkiye and European countries is expected to expand and deepen in 2023. In this context, there are strong expectations that Türkiye and Italy will establish a close dialogue on UCAVs in 2023. However, to establish real cooperation in this field, Türkiye must first be included in the SAMP/T air defense system program. Italian Prime Minister Giorgia Meloni's promise to help overcome the technical obstacles that prevent Türkiye from joining SAMP/T in her meeting with Erdoğan shows that Italy wants to strengthen cooperation with Türkiye in the field of

10 "Yunan Uzmanlar ABD'nin EastMed'den Destegini Çekmesini Değerlendirdi", Anadolu Ajansı, <https://www.aa.com.tr/tr/dunya/yunan-uzmanlar-abdnin-eastmedden-destegini-cekmesi-degerledi/2473798>, (Accessed: December 23, 2022).

11 "Council Prolongs the Sanctions Regime by One Year", Council of the EU, <https://www.consilium.europa.eu/en/press/press-releases/2022/11/08/eastern-mediterranean-council-prolongs-the-sanctions-regime-over-unauthorised-drilling-activities-for-a-further-year/>, (Accessed: December 23, 2022).

12 Prince Michael of Liechtenstein, "The Risks of Ignoring Türkiye", Geopolitical Intelligence Service, <https://www.gisreportsonline.com/r/Türkiye-west/>, (Accessed: December 23, 2022).

the defense industry.¹³ Türkiye’s inclusion in SAMP/T in a process where it strengthens its domestic and national defense industry will both improve its technical capacity and strengthen its defense-oriented ties with two major European countries, namely France and Italy. In response to Türkiye’s inclusion in the SAMP/T project, Türkiye may also negotiate to sell UCAVs to Italy in 2023 or later.

Türkiye will continue its policy regarding Finland and Sweden’s NATO memberships. Therefore, Finland and Sweden are expected to take more concrete steps to persuade Türkiye in 2023 to become a member of NATO as soon as possible.

The EPC might evolve into a new organization of 44 European countries in the long run. In this respect, France, the pioneer of EPC, can take new steps in 2023 for this new formation to take on an institutional structure. Taking these steps together with Türkiye may contribute to the faster normalization and even deepening of Türkiye’s relations with France and other European countries.

In any case, Türkiye will continue its EU accession negotiations, where it has not made any progress for a long time. However, while doing this, Türkiye will also deepen its institutional relations with the SCO, which the West assumes is an alternative to the EU.

PROSPECTS OF TÜRKİYE-EUROPE RELATIONS	
Defense Industry	Defense industry-based cooperation between Türkiye and Italy may increase. The two countries will likely build closer ties in this sector.
NATO Memberships of Sweden and Finland	Sweden and Finland, which believe that their national security is in danger due to Russia and therefore have applied for NATO membership, are expected to accelerate their fight against FETÖ and PKK organizations in their countries to persuade Türkiye.
European Political Community	If the EPC becomes an official organization, the political dialogue will be strengthened both within European countries and between Türkiye and European countries.
EU Membership	Türkiye will continue the negotiations as it sees EU membership among its strategic priorities. However, since Türkiye has not received a concrete membership signal from the EU, it will strengthen its communication with the SCO and similar organizations.
Eastern Mediterranean	With the U.S. withdrawing its support from EastMed, the feasibility of the project is weakened. Therefore, it is predicted that the ongoing tension between Türkiye and the EU and its member states due to the Eastern Mediterranean will decrease further.

13 “Italian PM Willing to Solve Issues on Türkiye’s SAMP/T Acquisition”, Daily Sabah, <https://www.dailysabah.com/business/defense/italian-pm-willing-to-solve-issues-on-turkiyes-sampt-acquisition>, (Accessed: December 23, 2022).

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TÜRKİYE-RUSSIA RELATIONS: DEEPENING STRATEGIC AND ECONOMIC RELATIONS AMID THE WAR IN UKRAINE



Muhammet Koçak

04



SUMMARY OF 2022

- 1 Russia started the military operation against Ukraine on February 24.
- 2 In Antalya, on March 29, the foreign ministers of Ukraine and Russia met, marking the highest level of contact between the two countries since the beginning of the war.
- 3 In Moscow, on July 19, the leaders of Türkiye, Russia, and Iran met to discuss the situation in Syria, as part of the Astana Process.
- 4 In Istanbul, on July 22, Türkiye, Russia, and Ukraine signed the grain deal, which enabled the export of grain from Ukraine and Russia.

In 2022, the Russia-Ukraine war was at the center of the dynamics that give direction to the Türkiye-Russia Relations. This year, within the framework of the war situation, Türkiye has adopted a strategy that takes into account its deepening relations with Russia, regional dynamics, and national interests. Accordingly, Türkiye condemned Russia's aggression and called on the international community to take action against Russia's violation of Ukraine's territorial integrity, while trying to alleviate the regional and global impacts of the war using its special relations with both Ukraine and Russia.

Following the beginning of the war, Türkiye aimed to take steps to facilitate peace between the two parties by bringing together Putin and Zelenskyy in Istanbul. As a result of Türkiye's efforts, Russian and Ukrainian delegations came together in Istanbul on March 29, when both sides expressed their satisfaction with Türkiye's efforts.¹ On March 10, on the margins of the Antalya Diplomatic Forum, Ukrainian Foreign Minister Dmytro Kuleba and Russian Foreign Minister Sergey Lavrov met.² Türkiye also assisted civilians affected by the war, reduced the severity of the war between the two countries, and facilitated the prisoner exchanges between the two countries.³

The Russia-Ukraine war caused a serious increase in global wheat prices, as these two countries, were the two leading grain exporters in Africa. Taking responsibility for finding a solution to the humanitarian dimension of the issue, Türkiye hosted the delegations of Ukraine and Russia in Istanbul, where the parties signed two memorandums of understanding on July 22. Within

1 "Rusya-Ukrayna müzakere heyetleri İstanbul'da bir araya geldi", Anadolu Ajansı, March 29, 2022.

2 "Rusya ve Ukrayna'dan Antalya zirvesi (Lavrov ve Kuleba görüştü)", NTV, March 10, 2022.

3 "Putin'den Cumhurbaşkanı Erdoğan'a övgü dolu sözler: Ukrayna ile esir takasındaki rolü nedeniyle ona minnettarız", Haberler, October 15, 2022.

the framework of the agreement reached, the ship traffic that was disrupted during the war from the Ukrainian ports restarted. Türkiye also stepped in after the suspension of the agreement by Russia in October, took initiatives at the level of leaders in the presence of Russia, and enabled the agreement to become operational again.⁴

Ongoing diplomatic and military efforts between Russia and Türkiye to find a solution to the situation in Syria continued in 2022. Putin and Erdoğan met on July 19 as part of the Astana Summit in Moscow with the participation of Iran's leader Ebrahim Raisi. After the meeting, the parties gave clear messages against terrorism and in favor of Syria's territorial integrity.⁵ This meeting indicated the resilience of the Astana process as the situation in Syria remained in flux.



In energy, multiple developments increased Türkiye's role in the transfer of Russian gas to the West.

In energy, multiple developments increased Türkiye's role in the transfer of Russian gas to the West. The first of these developments was the opening of the TurkStream project. Speaking at the ceremony, Erdoğan and Putin drew attention to the fact that the project is a strategic investment that serves regional peace.⁶

MAIN DYNAMICS

Russia-Ukraine War and Türkiye

Türkiye, Russia, and Ukraine are three of the most powerful and influential states in the Black Sea region. The war has had a transformative impact on the security environment in the Black Sea region. The conflict provides certain security challenges and economic opportunities to Türkiye, which possesses the southern coasts of the Black Sea and the Turkish Straits.

The war potentially changes Türkiye's comparative capacity in the region. For example, the annexation of Crimea in 2014 by Russia has provided an enormous strategic edge to Moscow. During the war, Russia further expanded its gains, by gaining control of the coastal lands between Crimea and Southern Ukraine. As of the end of the year 2022, Ukraine only controls the west of the

⁴ "Cumhurbaşkanı Erdoğan, Karadeniz Tahıl Koridoru Anlaşması'nın 120 gün süreyle uzatıldığını açıkladı", İletişim Başkanlığı, November 17, 2022.

⁵ "Joint Statement by President of Türkiye, President of Iran, President of Russia (July 19, 2022, Tehran)," The Official Website of the President of Türkiye, July 19, 2022.

⁶ "TurkStream Project Opened", BOTAŞ, January 10, 2020.

Dnipro River with the Port of Odesa being Ukraine's most important outlet. Russia's de facto control over Ukraine's ports and the coastline is tilting the balance of power in the region in favor of Russia.

Second, as the possessor of the straits, Türkiye is in a position to control the flow of the military and trade vessels in the Black Sea region. During the war, Türkiye maintained the management of this process in line with the clauses of the Montreaux Convention signed in 1936. Türkiye adopted a similar position during the Georgian War in 2008. Türkiye's position has had a drastic impact on the war. For instance, Türkiye does not allow Russia's warships outside of the Black Sea into the Black Sea. By abiding by the 1936 Montreaux Convention, Türkiye ensures its continuing control over the Turkish Straits.

Third, the war between Ukraine and Russia also provides certain opportunities for Türkiye as Russia faces economic sanctions from the West. Having established deep strategic and economic relations with Russia over the past 10 years, Türkiye refused to join economic sanctions on Russia and ended up being in a position to be a hub for Russia's export material and provider of Russia's import.

So far in 2022, the steps taken by Türkiye in line with its role as a peace facilitator enabled the parties to come together and negotiate some issues on a diplomatic basis. These efforts of Türkiye not only contributed significantly to Türkiye's soft power but also increased Türkiye's regional impact amid the turbulence caused by the Russia-Ukraine war. On the other hand, Türkiye pursues a very delicate policy to avoid antagonizing Russia, Ukraine, or the West (namely NATO and the EU).

Syria Issue

Russia remains an important factor in Türkiye's calculations on Syria. The remaining presence of the YPG in northern Syria continues to be the most important security issue for Türkiye. Determined to resolve this issue, Erdoğan has repeatedly expressed Türkiye's determination to initiate another cross-border operation. For the past five years, the security situation in Syria has rapidly changed with the beginning of the Astana Process between Türkiye, Russia, and Iran. The Syrian regime, backed by Russia and Iran, managed to take most of the key Syrian cities under its control, while Türkiye increased its control over the security situation in northern Syria. As of the end of 2022, Türkiye's new operation in the region has yet to start.

Despite deprioritizing Syria after the beginning of the conflict with Ukraine, Russia retains its key position in Syria. Making a statement after Türkiye signaled an operation against YPG targets in northern Syria, Russia expressed

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“First of all, we want to keep the door of diplomacy open. When the war gets more violent, which unfortunately seems to be happening now, those who think there is no more ground for diplomacy are often wrong. On the contrary, diplomacy becomes more important in such times.”

İbrahim Kalın

Türkiye’s Presidential Spokesperson

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that it understood Türkiye’s security concerns. This signal was interpreted as Russia giving the green light for the operation.⁷ However, within the past few years, Russia repeatedly suggested the restoration of Türkiye’s relations with the Syrian regime and insinuated that such a development would facilitate Türkiye’s taking control of its border. Most recently, Erdoğan called for Russia and Syria to start a trilateral process.⁸

Trade and Energy

Türkiye’s positive approach in the process following the start of the Russia-Ukraine war was also reflected in the energy relations between Russia and Türkiye. With the start of the attacks on Ukraine, EU member states took steps to avoid funding Russia by not purchasing Russian gas. The steps taken in this direction have changed the calculations on the energy geopolitics of the region. After the attack against the Nord Stream pipeline, which is one of the main lines that provide gas supply to Europe, Russia gave warmer messages to Türkiye.

PROJECTIONS FOR 2023

The ties established between Türkiye and Russia within the framework of the change in Türkiye’s foreign policy strategy after the July 15 coup are strengthening. Türkiye’s determination to act as an independent regional power positively influences Türkiye’s relations with Russia. Such determination is likely

7 “Kremlin: Türkiye’s legal right to campaign in northern Syria,” Türkiye Gazetesi, November 22, 2022.

8 “Cumhurbaşkanı Erdoğan’dan Putin’e Esad ile zirve teklifi”, NTV, December 15, 2022.

to help the two parties maintain the many aspects of their bilateral relations even during the most turbulent times. Despite the deleterious impact of the Russia-Ukraine war on regional peace, Türkiye and Russia will likely preserve their bilateral trade, energy relations, and their cooperation in multiple turbulent areas.

With both sides refusing to even negotiate for peace while the intensity of the war is increasing, there is no peace agreement in sight. Therefore, the war is expected to continue and is likely to escalate. Türkiye will remain engaged with both Russia and Ukraine in an attempt to alleviate the regional and global impacts of the war.

In Syria, Türkiye maintains pressure on northern Syria, where the YPG has partial control. Starting in 2023, the Türkiye-Russia-Syria axis will strengthen. Such development should increase Türkiye's control of the security situation in northern Syria while Russia gains deeper and more stable influence in the region.

In energy, Türkiye's role as a hub for the export of Russian energy is expected to increase. As Russia faces sanctions from the West and the risk of the Nord Stream Pipeline is growing, Türkiye's potential role as a hub for energy rises.

TOPIC	RUSSIA	TÜRKİYE	POTENTIAL RESULT
YPG and northern Syria	Resolution with the regime	Ready to engage the Syrian regime in the process	Diplomatic/military process with the participation of the Syrian regime
Russia-Ukraine war	Forcing Ukraine to recognize the invasion	End of the war with a negotiation process between the leaders	The escalation of the war
Trade/Energy	Increase of Türkiye's role as a hub for Russian energy products	Willingness to deepen cooperation	Deepening of cooperation, especially in the energy sector

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TÜRKİYE AND THE MIDDLE EAST: STRATEGIC REORIENTATION



Murat Yeşiltaş



İsmet Horasanlı

05



SUMMARY OF 2022

1

While the U.S. is much more focused on the war in Ukraine and China's new geopolitical move toward the region and the mutual interaction between the Gulf countries and Beijing, the Middle East and the Gulf region are undergoing significant geopolitical transformation.

2

As a result of a series of initiatives, while Türkiye has significantly increased its cooperation with the countries in the region, particularly with the United Arab Emirates (UAE), Saudi Arabia, and Israel, it deepening its strategic relations with Qatar.

The year 2022 was very busy in terms of Middle East developments. This is evident even from the visits of world leaders to the region. In this context, President Erdoğan visited the Gulf region in February, U.S. President Biden in July, German Prime Minister Olaf Scholz in September, Turkish Interior Minister Süleyman Soylu in November, Chinese President Xi Jinping in December, and Israeli President Isaac Herzog in December. This was driven by the global economic crisis and the growing importance of energy geopolitics. While the U.S. is much more focused on the war in Ukraine and China's new geopolitical move toward the region and the mutual interaction between the Gulf countries and Beijing, the Middle East and the Gulf region are undergoing significant geopolitical transformation. Three dynamics have been dominant in the Middle East during 2022: geopolitics, intra-regional normalization, and the continuation of internal conflicts and domestic instability.

Türkiye's primary policy objective in the Middle East and the Gulf in 2022 was to reorient itself in the regional geopolitical developments not as a peer competitor for major actors in the region but via diplomatic engagement within the context of normalization. As a result of a series of initiatives, while Türkiye has significantly increased its cooperation with the countries in the region, particularly with the United Arab Emirates (UAE), Saudi Arabia, and Israel, it deepening its strategic relations with Qatar.

MAIN DYNAMICS

Normalization

Türkiye's main effort during 2022 was to consolidate the normalization process with the regional countries. Four drivers are important to explain Türkiye's normalization strategy in the Middle East. The first is directly related



Türkiye sees the normalization process as a tool to minimize the security risks arising from Syria and Iraq.

to the economy. The Turkish economy, which was affected by the deep fluctuations in the global economy after the pandemic and the war in Ukraine, experienced serious relief with the normalization process. Although the normalization process with Saudi Arabia and the UAE is not only about the economy, the economic agreements with these countries have had a positive effect on the Turkish economy in 2022. The second is about geopolitics. The vague strategy of the U.S. toward the Middle East and the Gulf region and Russia's prioritization of the war in Ukraine directly affect the geopolitical calculation in the Middle East, which further increases the possibilities of

the rapprochement between the countries of the region. Türkiye is seen as the first destination of this rapprochement due to being one of the most powerful countries in the region and its increasing geopolitical importance after the Ukraine war.

The third reason is political. The ideological rivalry that deepened after the Arab Spring is losing its regional-scale effectiveness and influence.

Türkiye and other actors, which are part of the ideological competition, have changed their policies and follow more pragmatic strategies by turning from identity-based policies to security, power, and economic-based policies. The fourth driving factor is security. Security has become the top priority of all major actors in the region. Migration, radicalization, terrorism, and the proliferation of non-state armed actors cause states in the Middle East to follow a policy that puts security at the center. Türkiye sees the normalization process as a tool to minimize the security risks arising from Syria and Iraq. When analyzed in this way, Türkiye's normalization policy with Saudi Arabia and the UAE is about the economy, geopolitics, and politics, while the normalization process with Israel is built on its geopolitical and geo-economic rationality. The normalization process with Syria is probably related to security concerns.

IRAN AND IRAQ

Iraq and Iran are the most important countries in Türkiye's policies in the Middle East. While Iraq is influencing Türkiye's security due to the PKK terrorist organization's presence in northern Iraq and Tehran's influence over Baghdad, Iran's regional activism from Syria to Iraq and the geopolitical competition between Ankara and Tehran are other strategic considerations for Ankara's policies in the Middle East. More recently, Azerbaijan became another issue after the Karabakh victory against Armenia in which two countries supported different sides.

Iraq, which has been under the influence of war for many years and has not yet regained its stability, poses a potential risk to Türkiye's national security. As a matter of fact, the Iraqi extensions of the PKK are engaged in certain activities, and Türkiye has been conducting operations within Iraqi borders under international law to eliminate such risk factors. In addition to pro-PKK groups, Iranian-backed Shiite militia groups, particularly Asaib Ahli Haq, have reacted harshly to Türkiye's operations.¹ In some cases, this issue has led to efforts to link unidentified acts that occurred in the chaotic environment of Iraq to Türkiye. The incident that took place on July 20, 2022, in the Zakho region of northern Iraq and the developments that followed constitute a concrete example of this.² However, Türkiye's foreign policy toward Iraq is based on the basic principle that a stable political environment should be established and Türkiye's national security should not be threatened via Iraqi borders. On the one hand, Iraq has a significant common border with Türkiye, and on the other hand, it is a market where Turkish goods can be highly sought after if stability is achieved.

One of the crucial strategic developments for Türkiye in Iran was a mass demonstration against the Iranian state across the country. Unlike the traditional autumn Iranian protests of the last 10-15 years, this time the protests lasted for a long time and reached large masses. The Iranian regime, on the one hand, does not give up on the Sharia codes that constitute the basic principles of the Islamic Republic of Iran, and on the other hand, it seems to be helpless in the face of the demands of a young population that aspires to integrate with the modern world. Although the authorities rhetorically state that the morality police have been abolished, no legal steps have been taken in this regard. Protests are more or less still ongoing. While the approach of Türkiye toward the issue has been official and distant, Ankara does not take any side, claiming that such issues are an internal matter of Iran.

2023 PROJECTION

Considering the above information, it seems that 2023 will be a very dynamic year. China's investments in the Gulf region seem to be increasing. On the one hand, it has signed agreements with the Arab Gulf countries, and on the other hand, it has signed 25-year strategic agreements with Iran. Therefore,

1 MEPA, "İran'a bağlı Şii milis gruplar Türkiye'yi tehdit etti", <https://www.mepanews.com/irana-bagli-sii-milisler-Turkiyeyi-tehdit-etti-53817h.htm> (Accessed: December 14, 2022).

2 T.C. Dışişleri Bakanlığı, No: 231, 20 Temmuz 2022, Irak'ın Dohuk Vilayeti'nde Gerçekleştirilen Saldırı Hk. https://www.mfa.gov.tr/no_-231_-irak-in-dohuk-vilayeti-nde-gerceklestirilen-saldiri-hk.tr.mfa (Accessed: December 14, 2022).

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“The steps taken in our relations with Israel will in no way diminish our support for the Palestinian cause. Our Palestinian brothers have also expressed that these steps will contribute to the solution of the issue and the improvement of the situation of the Palestinian people.”

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Recep Tayyip Erdoğan

President of Türkiye

the growing Chinese influence in the region, which the U.S. defines as its vital interest, is likely to bring with it competitive tensions between these two powers. In 2023, another important development is the normalization process among the countries in the region, which have just emerged from a tense political environment. The Arab-Israeli normalization process comes to the forefront here. As Israeli President Herzog stated during his visit to Bahrain in 2022, Israel will try to include more allies in this circle in the coming year.

Türkiye’s normalization process with countries in the region, particularly with the UAE and Saudi Arabia, continues to deepen. In this respect, the recent positive developments with the UAE indicate that the relations between the two countries will continue to follow a positive course in the coming year. In this respect, it would not be wrong to say that relations with the UAE have completed the normalization phase. Relations with Saudi Arabia, on the other hand, are likely to continue within the framework of the existing platforms in the absence of extraordinary development. Considering Türkiye’s desire for a stable Iraq and its policy of eliminating threats to its national security, it seems that Türkiye’s relations with Iraq will mainly be determined by what happens within Iraqi borders. Within this context, Türkiye will likely continue its military operations against terrorist elements threatening its national security in northern Iraq. While Türkiye-Iran relations will be influenced by Türkiye’s military operation in Syria against the YPG, both countries will continue to compete against each other over Iraq and Azerbaijan.

SYRIA: NORMALIZATION OR ESCALATION?



Kutluhan Görücü

06



SUMMARY OF 2022

- 1 Türkiye carried out Operation Claw-Sword against the YPG/PKK in November. President Erdoğan also stated that a ground operation may come.
- 2 Defense Minister Hulusi Akar held a meeting with his Syrian counterpart Ali Mahmud Abbas in Moscow for the first time in 11 years.
- 3 President Erdoğan said that it is possible to negotiate with the Syrian regime.
- 4 The HTS took advantage of the conflict between SNA groups and established dominance in Afrin for a while.
- 5 The March 5 agreement, which was achieved with Operation Spring Shield, continued in 2022 and the ceasefire was maintained in Idlib.

With the ceasefire provided by the March 5 Agreement, 2022 was recorded as the second year that there was no territorial change in the Syrian war.¹ The military balance that Türkiye established between the regime and the opposition with Operation Spring Shield remains valid today. In fact, it can be stated that Türkiye is in a stronger position compared to 2020. Undoubtedly, in this case, it can be said that Russia's invasion attempt against Ukraine since the beginning of the year has also been effective.

It can be said that the normalization process between Türkiye and the Syrian regime, Türkiye's possible military operation against the YPG/PKK, the Afrin operation of the HTS, and the ceasefire in Idlib will come. The ongoing negotiations between Türkiye and the regime at the intelligence level are intended to be taken to an advanced level. On the other hand, after Operation Claw-Sword that Türkiye carried out to cover Iraq and Syria, Türkiye started to talk about the option of a military operation, including the ground operation in northern Syria.² The HTS, which became a party to the clashes within the SNA and entered Jindires in June, entered Afrin in October and gained control of the city.³ With the massive withdrawal of the HTS,⁴ the problem has been resolved for now. However, there is no obvious obstacle to the return

1 "It has been 11 years since civil war erupted in Syria", *Anadolu Agency*, (March 14 2022), retrieved from <https://www.aa.com.tr/en/middle-east/it-has-been-11-years-since-civil-war-erupted-in-syria/2534621>

2 Rich Outzen, "The risks and rewards of Erdoğan's next military operation", *Atlantic Council* (December 1, 2022), retrieved from <https://www.atlanticcouncil.org/blogs/Turkiyesource/the-risks-and-rewards-of-Erdogans-next-military-operation/>

3 Rena Netjes, "Shifting Lines and IDPs: Azaz, Afrin, and the HTS Incursion", *Fikra Forum Political Analysis*, (October 19, 2022) retrieved from <https://www.washingtoninstitute.org/policy-analysis/shifting-lines-and-idps-azaz-afirin-and-hts-incursion>

4 Levent Kemal and Ragıp Soylu, "Syria: Türkiye to reorganise rebel groups as HTS withdraws from Afrin" *Middle East Eye*, (October 25, 2022) retrieved from <https://www.middleeasteye.net/news/syria-turkiye-reorganise-rebel-groups-hts-withdraws-afirin>

of the HTS in the future. Of course, the expansion policy of the HTS in opposition areas also stems from the ceasefire in Idlib. Relieved in the Idlib field, the HTS has turned its attention to easy targets. With the continuation of the Idlib ceasefire, an increase in the influence of the HTS can be seen in the Syrian opposition. The future of the ceasefire in Idlib can also be evaluated from this aspect.



It can be said that the normalization process between Türkiye and the Syrian regime, Türkiye's possible military operation against the YPG/PKK, the Afrin operation of the HTS, and the ceasefire in Idlib will come.

MAIN DYNAMICS

The Possible Military Operation of Türkiye

The balance provided by Operation Spring Shield in Idlib shows that the possible military activity in Syria may be between Türkiye and the YPG/PKK. Türkiye has constantly voiced the option in question since 2021. After the terrorist act in Istanbul's Taksim and Istiklal Street,⁵ Türkiye's Claw-Sword Air Operation was perceived as the harbinger of a ground operation. As a matter of fact, President Erdoğan also made statements in this direction.⁶ Going further, he stated that the first target areas are

Tal Rifaat, Manbij, and Ain al-Arab. Last June, he stated that they were Tal Rifaat and Manbij.

Negotiations continue between Türkiye and Russia, although a month has passed since the statements made on November 23. On the other hand, Russia is trying to persuade the YPG/PKK to leave regions such as Tal Rifaat, Manbij, and Ain al-Arab to the regime. However, it is also known that it did not get any results. The U.S., on the other hand, opposes the military operation completely, as in the past. However, the Tal Rifaat region differs here because the U.S. believes that the region is not officially affiliated with the SDF. On the other hand, according to the agreement made in 2019, Manbij and Ain al-Arab are among the sanction zones of the U.S. if Türkiye carries out an

5 "İstiklal is Ours": Türkiye remains united, defiant after terror attack" *Daily Sabah*, (November 16, 2022) retrieved from <https://www.dailysabah.com/Türkiye/istanbul/istiklal-is-ours-Türkiye-remains-united-defiant-after-terror-attack>

6 "Turkish President indicates he will go beyond air strikes, launch ground operation in north Iraq, Syria", *ANI South Asia's Leading Multimedia News Agency* (November 21, 2022), retrieved from <https://www.aninews.in/news/world/asia/turkish-president-indicates-he-will-go-beyond-air-strikes-launch-ground-operation-in-north-iraq-syria20221121212214/>

operation. The threat of sanctions before the 2023 election in Türkiye seems quite risky for the current state of the economy.

On the other hand, Russia shows Ain al-Arab (Kobani) as the operation area for Türkiye. Indeed, according to Russia, Tal Rifaat and Manbij are under regime control. Likewise, the Russian Ministry of Defense defines the regions in question on their maps in this way. Ain al-Arab also stands out in terms of uniting the regions with Operation Peace Spring and Operation Euphrates Shield, the relocation of the Süleyman Shah Tomb to its former location, and its symbolic and psychological importance for the PKK. However, the operation against Ain al-Arab carries risks such as the threat of U.S. sanctions. For this reason, Tal Rifaat is being spoken for the first stage.

The possible normalization process between Türkiye and the Syrian regime

Türkiye's ceasefire changed the military situation, which used to be in favor of the regime in Idlib with Operation Spring Shield and brought a new balance in Syria. This balance did not change the field of diplomacy, although it provided the opportunity for a ceasefire in the field militarily. In the ongoing process, the regime froze the ongoing constitutional negotiations in Geneva. However, the regime caught certain traffic of talks with the Arab world. Steps of normalization were attempted. The first official message regarding the normalization between Türkiye and the regime came from Foreign Minister Mevlüt Çavuşoğlu. On August 11, Çavuşoğlu said, "We have to somehow come to terms with the opposition and the regime in Syria. Otherwise, there will be no lasting peace," as the first steps of normalization.⁷ Then, President Erdoğan's statement "I can meet with Bashar Assad"⁸ after meeting with Egyptian President Abdel-Fattah el-Sissi in Qatar clearly revealed the authenticity of Türkiye's intentions to establish relations with the regime.

Although Türkiye's intentions to normalize or establish relations with the regime have been revealed, it is seen that there is a cautious approach on the part of the regime. The regime, taking strength from the extremely positive approach of the opposition in Türkiye, has avoided taking a step toward normalizing relations with Türkiye before the election. In addition, some Syria experts oppose negotiations with the regime, claiming that even in the regions controlled by the regime, its power is limited and it cannot promise any-

7 "Syria rebels call protests over Türkiye's 'reconciliation' proposal", *Al-Monitor*, (August 12 2022), retrieved from <https://www.al-monitor.com/originals/2022/08/syria-rebels-call-protests-over-Turkey-reconciliation-proposal#ixzz7ndk8shhO>

8 "Türkiye's Erdoğan says will meet Syria's Bashar Al-Assad when 'time is right'", *The New Arab*, (October 7, 2022) retrieved from <https://www.newarab.com/news/i-will-meet-assad-when-time-right-Erdogan>

“

“We are committed to protecting our borders and ensuring the security of our people and nation. We have done and continue to do what we have to do. Nobody should expect any indulgence from Türkiye in this matter.”

”

Hulusi Akar

Minister of National Defense of Türkiye

thing to Türkiye. Despite experts' opinions on the subject, the Turkish public viewed the meeting with the regime positively.

Regarding the meeting with the Syrian regime, Çavuşoğlu said: “We are meeting with the Syrian regime through intelligence organizations. If the regime behaves realistically, we are ready to work together on the fight against terrorism, the political process, and the return of Syrians.”⁹ The statement clearly reveals Türkiye's agenda in establishing a dialogue with the regime. The fight against the YPG/PKK in Syria, the political process, and the return of Syrian refugees currently in Türkiye are among the most critical issues for Ankara. Although Türkiye determines the topics, the issue of “what can the regime promise about these topics” is open to discussion. Considering that the YPG/PKK is under the U.S. umbrella and Russia has a similar view as the U.S. on the YPG/PKK issue, it can be seen that the regime has limited influence. It is seen that the regime did not take any steps in the context of the political process, and even froze the constitutional negotiations. Regarding the return of Syrians, the examples of Jordan and Lebanon showed extremely bad results.¹⁰ It is known that even the Syrians living in the regime regions leave the country or seek to leave the country due to poor living and economic conditions. For the return of the Syrians, studies are required beyond the reconciliation of the regime and the opposition. In this respect, the files of the possible normalization process of the regime with Türkiye seem quite challenging.

9 “Çavuşoğlu: Türkiye won't allow terror groups to take shelter in Syria, Iraq”, *TRT World*, (December 13, 2022) retrieved from <https://www.trtworld.com/Türkiye/cavusoglu-t%C3%BCrkiye-won-t-al-low-terror-groups-to-take-shelter-in-syria-iraq-63471>

10 Muhammet Tarhan, “Rapor: Esed rejimiyle anlaşılan Ürdün ve Lübnan'dan dönen Suriyeli sayısı azalıyor”, *Anadolu Ajansı*, (October 24, 2022), retrieved from <https://www.aa.com.tr/tr/dunya/rapor-esed-rejimiyle-anlasan-urdun-ve-lubnandan-donen-suriyeli-sayisi-azaliyor/2719685>

Hayat Tahrir al-Sham's attack on Afrin

The ceasefire environment provided by Operation Spring Shield did not end the conflicts between the opposition groups; on the contrary, it increased the rivalry between them. In 2022, Hayat Tahrir al-Sham's (HTS) moves toward Afrin twice can be read with HTS's increasing involvement in the conflicts¹¹ between the Syrian National Army (SNA) groups and its efforts to expand its power in opposition areas.

The HTS does not have the power to advance against the regime in Idlib and its surroundings. In addition, conflicts, power gaps, and power struggles between SNA groups also open up a lot of space for HTS. Afrin developments in 2022 can be expected to continue in 2023. However, there is a high probability that Jabhat Shamiya will prevent the HTS from making a move toward the Operation Euphrates Shield region, just like in October, on the Kafr Cenne and Azaz lines. However, Afrin and the surrounding region continue to be among the target areas of the HTS.



**Afrin developments in 2022
can be expected to continue
in 2023.**

The Idlib Ceasefire

Türkiye provided a military balance against the regime with Operation Spring Shield. It is also seen that the relations between Türkiye and Russia played a decisive role in the formation and continuation of this ceasefire. However, Türkiye's critical developments in the defense industry sector may drag Ankara to an even more advantageous position in the field. In addition to Hisar air defense systems, Türkiye's hand is strengthened by the fact that Akıncı is included in the inventory and that Kızılelma is expected to enter mass production in 2024 in the field of Unmanned Aerial Vehicles (UAV). As a matter of fact, even in 2020, Türkiye's military capabilities and deterrence were seen.

In addition, Russia's invasion attempt against Ukraine and Iran's internal public opinion being shaken by uninterrupted protests are obstacles to their focus on Idlib. In addition, it is seen that there is no question of Türkiye taking any steps back on Idlib. Considering the positioning of the Turkish Armed Forces (TAF) in the Idlib area, it is seen that it has almost built a

¹¹ "Türkiye to restructure Syrian rebel military, disband SNA factions after HTS withdraws from Afrin" *Middle East Monitor*, (October 26, 2022) retrieved from <https://www.middleeastmonitor.com/20221026-Turkiye-to-restructure-syrian-rebel-military-disband-sna-factions-after-hts-withdraws-from-afrin/>

security wall to the north and south of the M4 road.¹² The TAF has at least 75 military bases or points in Idlib.¹³ Based on these and similar points, it is seen that Türkiye has secured the Idlib area. The current situation can be expected to continue in 2023.

HOW WILL THE CURRENT DYNAMICS BE SHAPED IN 2023?

Syria of 2022 sheds light on Syria of 2023. It can be stated that the truce between the regime and the opposition established by Operation Spring Shield may continue. Of course, this may mean that the calm in Idlib will continue. By using this ceasefire environment, it can be expected that the HTS will continue to make rifts in the Syrian opposition and continue to infiltrate from those points. Despite all this, Türkiye's attitude will be decisive.

It can be said that the HTS's policy toward the Syrian opposition began with its suppression of the opposition in Idlib. Then, Türkiye's easing of the security environment in Idlib put the HTS in a position to engage in other agendas. The HTS also began to develop a policy toward the regions controlled by the Syrian opposition, to become a part of the conflict between the SNA groups and took advantage of this weakness. Thus, it was able to advance as far as controlling Afrin. Even though Türkiye was involved, the influence of the HTS in the SNA and Afrin caused a break in the Syrian opposition. If this break is affected by Türkiye's possible normalization process with the regime, even external factors may come into play. In 2023, one of the issues that Türkiye should pay attention to is to be able to provide transparent progress with the components of the Syrian opposition when there is a possible normalization process with the regime.

How the possible normalization process between Türkiye and the regime will take place is one of the biggest enigmas of 2023. The talks, which started at the intelligence level and are continuing at ministerial level between defence ministers, need to enable a certain agreement that will be reached on the files being worked on. The year 2023 may be the year when these studies begin. However, the question "How will a result emerge and be applicable in the field" remains a big question mark.

12 Khaled al-Khateb "Who benefits from attacks on Turkish forces in Idlib?", Al-Monitor, (February 10, 2022), retrieved from <https://www.al-monitor.com/originals/2021/02/syria-attacks-Türkiye-military-idlib-regime-hts-jihadist.html#ixzz7ndzpWfWP>

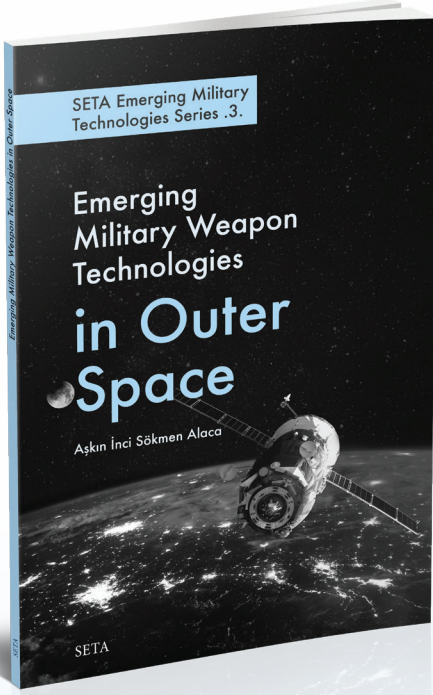
13 "TSK, M4'ün güneyinde cephe hattında yeni bir askeri üs inşa ediyor" *Suriye Gündemi*, (December 18, 2021), retrieved from <https://www.suriyegundemi.com/tsk-m4-uen-gueneyinde-cephe-hattinda-yeni-bir-askeri-ues-insa-ediyor>

Regardless of the concerns, the main dynamics that rendered the normalisation process possible in the first place will still be around in 2023, such as Russia's insistence on normalisation of relations between Ankara and Damascus as well as Ankara's willingness to cater to that insistence within the context of the war in Ukraine; Ankara's tendency to avoid costly and escalatory policies at least until the polls in June 2023. Thus, despite significant question marks on the viability of a rapprochement with Damascus, the process should be expected to progress in 2023.

As detailed in the above title, Türkiye's possible military operation against the YPG/PKK constitutes one of Türkiye's biggest challenges in the Syrian field. It is out of the question for the U.S. and Russia to give up on the YPG/PKK in the Syrian field. Even at the points where the U.S. withdrew, Russia undertakes to protect the YPG/PKK. As in the cases of Manbij and Ayn al-Arab, the threat of sanctions by the U.S. still persists. Considered together with the Iraqi field, Türkiye's established gains against terrorism are quite valuable. 2023 may be a year in which these gains are preserved and articulated.



Regardless of the concerns, the main dynamics that rendered the normalisation process possible in the first place will still be around in 2023, such as Russia's insistence on normalisation of relations between Ankara and Damascus as well as Ankara's willingness to cater to that insistence within the context of the war in Ukraine; Ankara's tendency to avoid costly and escalatory policies at least until the polls in June 2023. Thus, despite significant question marks on the viability of a rapprochement with Damascus, the process should be expected to progress in 2023.



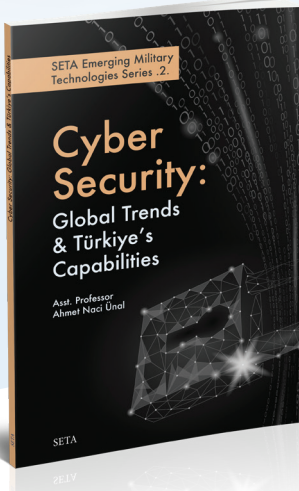
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Aşkın İnci Sökmen Alaca

Outer space and the related studies emerged once again as a strategically important domain in a military sense among countries with access to space. In this regard, space technologies and the ability to access space are viewed as a kind of force multiplier in the military terminology.



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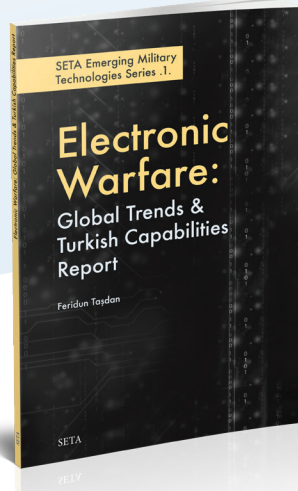


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EASTERN MEDITERRANEAN: DEVELOPMENTS AND PROJECTIONS



Murat Aslan

07



SUMMARY OF 2022

1

The Greek-Turkish relations presented a rhetoric-based escalation pushing the Greek's search for a patron to balance Türkiye.

2

Israel-Türkiye normalization has been achieved through the official visits paid by Israeli President Isaac Herzog, Foreign Minister Yair Lapid and Foreign Minister Mevlüt Çavuşoğlu in addition to the meeting between President Erdoğan and Prime Minister Lapid on the sidelines of the U.N. General Assembly.

3

Egypt-Türkiye relations have long been technically negotiating the normalization of relations, but both countries' diverse interests have slowed the pace. The meeting of Presidents el-Sissi and Erdoğan in Doha on the sidelines of the Word Cup signaled a positive step.

4

Türkiye-Libya agreements on exploring, drilling, and processing the off-shore resources mobilized the Greek and Egyptian efforts.

MAIN DYNAMICS

Security / Military Developments

There was a moderate proceeding of bilateral Turkish and Greek relations in 2021 based on direct exploratory talks. In this context, President Erdoğan and Prime Minister Kyriakos Mitsotakis met in Istanbul on March 10, 2022, for direct talks as a further step toward calming down the strained relations.¹ On the other hand, Mitsotakis' visit to the U.S. and his address to the U.S. Congress, advertising Türkiye as hostile with a call to ban the F16 sales, leveled the developing relations, two months after the Istanbul Summit.² The leaders had agreed to avoid including the third parties but proceed with the direct talks. President Erdoğan reacted to the hostile attitude of Mitsotakis and stopped direct communication and said Mitsotakis was “non-existent” for him. The resonation of another strain in relations led to projections of probable military escalation between the Greek-Turkish armed forces. The Greek violation of Turkish airspace over the Aegean Sea had started in April, prior to the famous speech of Mitsotakis at the U.S. Congress, through 30 military flights in 72 hours.³ Türkiye withdrew the military units from the Tiger Meet

1 Derya Gülnaz Özcan, Tefik Durul, “Yunan basını: Miçotakis'in İstanbul ziyareti beklentileri aştı”, *AA*, March 14, 2022, <https://www.aa.com.tr/tr/dunya/yunan-basini-micotakis-in-istanbul-ziyareti-beklentileri-asti/2534515>, (Accessed: December 19, 2022).

2 Yorgo Kirbaki, “Greek PM complains about Türkiye to Biden: Gov't sources”, *Hurriyet Daily News*, 18 May 2022, <https://www.hurriyetaidailynews.com/greek-leader-tells-congress-democracy-is-tested-by-russia-173862>, (Accessed: December 19, 2022).

3 The Defense Post, “Türkiye Accuses Greek Jets of Violating Airspace”, April 29, 2022, <https://www.thedefensepost.com/2022/04/29/Turkiye-greek-jets-violation-airspace/>, (Accessed: December 19, 2022).

Exercise since the Greek authorities amended the scripts and indirectly indicated Türkiye as hostile.⁴

Another issue is the islands in the Aegean Sea. Contrary to the clear terms of the Lausanne and Paris Treaties, Greece militarized the islands. Meanwhile, the American grant of 1,200 armored personnel carriers was transferred to the islands, which are just a few kilometers away from the Turkish coasts.⁵ Given the fact that the U.S. and Greece have established a series of military bases covering the whole West of Türkiye, from Crete to Dedeagaç – 40 kilometers away from the Turkish border, Türkiye informed the UN about the violations



Turkish-Greek relations presented a rhetoric-based escalation pushing the Greek's search for a patron to balance Türkiye.

of the treaties. Meanwhile, Foreign Minister Çavuşoğlu frankly criticized the militarisation of the islands and warned about questioning the possession of the islands.⁶ He emphasized that the violation would result in questioning the possession rights. Erdoğan's harsh criticism followed Çavuşoğlu reiterating a probable military operation unless the Greeks do not fulfill their responsibilities.⁷ This move mobilized the Greeks to complain about the Turkish attitude

to the EU and American politicians. Nevertheless, the Turkish-Greek relations presented a rhetoric-based escalation pushing the Greek's search for a patron to balance Türkiye.

Political and Energy Developments

Türkiye started a normalization process in the last two years for three reasons, mainly focusing on the Gulf region and the Eastern Mediterranean. The initial reason is that any hostility builds a countering camp to downgrade Turkish interests. The second concern is the Greek attitude to exploit the opportunities at the expense of Türkiye's agenda. Finally, Türkiye commenced a moderate foreign policy through dialogue and mediation to obtain political initia-

4 The Defense Post, "Türkiye Air Force Pulls Out of Military Exercise in Athens", May 2, 2022, <https://www.thedefensepost.com/2022/05/02/Türkiye-pulls-out-exercises-athens/>, (Accessed: December 19, 2022).

5 Daily Sabah, "Greece sends US-donated armored vehicles to demilitarized islands", September 25, 2022, <https://www.dailysabah.com/politics/diplomacy/greece-sends-us-donated-armored-vehicles-to-demilitarized-islands>, (Accessed: December 19, 2022).

6 Merve Aydoğan, "Greece's illegal militarization of Aegean islands could put their sovereignty in question", AA, June 7, 2022, <https://www.aa.com.tr/en/politics/greeces-illegal-militarization-of-aegean-islands-could-put-their-sovereignty-in-question/2607801>, (Accessed: December 19, 2022).

7 Daily Sabah, "Greece has to know its place, remember history: President Erdoğan", November 16, 2022, <https://www.dailysabah.com/politics/diplomacy/greece-has-to-know-its-place-remember-history-president-erdogan>, (Accessed: December 19, 2022).

tive. In this context, Israel-Türkiye normalization has been achieved through the official visits paid by Herzog, Lapid, and Çavuşoğlu in addition to the meeting held by President Erdoğan and Prime Minister Lapid on the sidelines of the U.N. General Assembly.⁸ After Turkish intelligence successfully denied the Iranian attempt to attack Israeli tourists in Istanbul, the ambassadors' appointment to the capitals normalized the relations. Netanyahu's qualification for the office of prime minister did not change this course.

Another normalization process was not as progressive as that seen with the Israelis. Egypt-Türkiye relations have long been technically negotiating the normalization; however, both countries' diverse interests have slowed the pace. The meeting of Presidents el-Sissi and Erdoğan in Doha on the sidelines of the World Cup encouraged hope. At the same time, the Egyptian leader appeared more prone to obtain two pledges, the Muslim Brotherhood and Libya folders. The Muslim Brotherhood has announced that it is not against positive relations between Egypt and Türkiye, while Libya is not as easygoing. Egypt, disregarding the Russian presence in Libya, threatened to stop the process due to Türkiye's presence and influence in Libya. The Greek provocations, on the other hand, impeded the developing relations of both countries, specifically after the signature of the Turkish-Libyan off-shore hydrocarbon exploration and extraction agreement.⁹

DYNAMICS OF TÜRKİYE'S EASTERN MEDITERRANEAN POLICY

Türkiye's essential parameter is to preserve sovereign rights in the Eastern Mediterranean through a fair and just share of the sea shelf. In this sense, Türkiye intends to delimit the maritime zone, similar to the Black Sea, by promoting a win-win strategy. On the other hand, the Greek arguments for imprisoning Türkiye across the longest coast to the Mediterranean appear as a "no-go" area that Türkiye cannot tolerate. For this purpose, Türkiye is insistent on preventing the maximal demands of the Greeks and Greek Cypriots.

The normalization process with Israel and Egypt is the primary initiative to realize this expectation, while Greeks are keen to prevent such a process. Another dynamic is the Turkish Cypriots and the sovereignty of the Turkish Republic

⁸ Jonathan Harounoff, "After Normalization Deal, What Now for Israeli-Turkish Relations?", Haaretz, September 8, 2022, <https://www.haaretz.com/israel-news/2022-09-08/ty-article/.highlight/after-normalization-deal-what-now-for-israeli-turkish-relations/00000183-1846-d4db-a9a7-984ed3d90000>, (Accessed: December 19, 2022).

⁹ Libya Update, "Libya and Türkiye sign two agreements on hydrocarbons", 3 October 2022, <https://libyaupdate.com/libya-and-turkiye-sign-two-agreements-on-hydrocarbons/>, accessed on 19 December 2022.

“

“I expect the European Union to invite our counterparts to engage in dialogue on a bilateral basis, instead of supporting unfair and unlawful initiatives in the name of ‘union solidarity.’”

”

Recep Tayyip Erdoğan

President of Türkiye

of Northern Cyprus (TRNC). The Organization of Turkic States (OTC) accepted the TRNC as an “observer” country, which has become the initial step to bypass the isolationist policy of the West. Türkiye refers to the rights of the Turkish Cypriots as inviolable. The final dynamic for Türkiye is observing the American positioning in favor of Greece parallel with the American support for the PKK/PYD/PYD/SDF terror network.

Under the clout of the Egyptian-Greek axis against Türkiye across the Eastern Mediterranean, Libya has continued to struggle for a political transition through constitutional referendums and political elections. The parallel government of Fathi Bashaga and Khalifa Haftar’s challenge to the country’s stability, with the encouragement of the Egyptian-Greek bloc, consumed the hopes of proceeding with the Berlin Conference’s 55 articles. Libya remained fragile against the interventions of external actors through the encouragement of Haftar and his sons despite the Russian military presence being reliant on their own capacity to perceive Haftar as an apparatus to ensure the endurance of Russian positioning.

HOW COULD THE CURRENT DYNAMICS EVOLVE IN 2023?

Türkiye’s Greece and Greek Cypriot policies could remain the same as last year. There may be a European effort to calm the escalation due to the potential effects of this negative resonance after the Russian aggression on Ukraine. A military crisis in the Aegean Sea may cut the energy flow from the Caucasus to Europe. On the other hand, Greeks escalate the tension as far as they feel that they enjoy foreign support disregarding to what extent the third parties exploit such escalation.

The normalization process of Türkiye may continue in the East Mediterranean. The competition of Türkiye and Greece will offer opportunities to the countries in the region, though; the interests of Israel and Egypt require normalization to expand their area of energy exploitation. Nevertheless, Egypt may focus on the Libyan case, which could delay the normalization with Türkiye, but this process benefits the two countries. Hence, there could be positive developments, even though Greeks would be disappointed.

After all, the discovery of energy resources may provoke the agendas of all parties, especially across the disputed maritime zones.

Projecting the Future

A military escalation is a loose option for all parties. There could be verbal accusations and provocations in the Eastern Mediterranean region, but not a full-fledged military engagement. The political stalemate of regional disputes and military show of force could be wise options for the Greeks. In this sense, Greece may start harassing the Libyan coast guards to challenge the delimitation of the Turkish-Libyan maritime zone. Such a Greek strategy would promote the political status of the current Greek government. Türkiye will not remain silent about such an act. Hence the military escalation in the Eastern Mediterranean depends on the political calculations of the Greeks.

The normalization process of Türkiye will continue in 2023. The elections in Türkiye will not affect this course since it has been a state policy. Israel and Egypt are the actual beneficiaries of this proceeding, and one should expect positive developments per the achievements in the Libyan political process.

Regarding Cyprus, the Turkish proposal is to formalize the actual status – the two-state solution for eternal peace on the island. Nevertheless, the Greek Cypriots are happy with preserving the de facto stalemate to attract the EU's political and military investment in them. Any sort of solution to the Cyprus folder is against the interests of the Greeks and Greek Cypriots as far as they achieve their strategic objectives. This pattern will continue.



The normalization process of Türkiye will continue in 2023. The elections in Türkiye will not affect this course since it has been a state policy.

PROSPECTS OF THE EASTERN MEDITERRANEAN REGION			
ISSUE	COUNTRY	TÜRKİYE	POTENTIAL OUTCOME
Normalization	Israel Egypt	Türkiye will continue with normalization.	A new energy stance in the Eastern Mediterranean
Libya	Russia Egypt Greece European states EU	Türkiye will support the constitutional referendum and political process.	The Libyans may announce a realistic road map for a political process. Haftar may continuously challenge any political order once he feels marginalized. Greece may prefer limited use of force or present a “military show of force” on Libya to challenge the Libyan-Turkish maritime delimitation and hydrocarbon agreement.
Greece Problem	Greece	Türkiye will preserve its interests. Once Greece abides by lowering the tension, Türkiye may de-escalate.	For the sake of energy security, there may be gradual but temporary stability with occasional escalations.

TÜRKİYE-AFRICA RELATIONS



Tunç Demirtaş

08



SUMMARY OF 2022

- 1 President Recep Tayyip Erdoğan paid official visits to the Democratic Republic of Congo and Senegal.
- 2 Foreign Minister Mevlüt Çavuşoğlu visited Senegal as well as Ghana and Benin to attend the 8th edition of the International Forum of Dakar on Peace and Security in Africa.
- 3 With the new agreements made this year, Türkiye has cooperated with more than 20 countries in Africa in the field of the defense industry.

Africa continued to be one of the unique geographies in the global system in 2022. In 2022, intra-state conflicts, terrorism, and coups were among Africa's most significant security problems. It is mentioned that Türkiye's relations with Africa, which started on a humanitarian scale, will continue to expand with new areas over a decade. In this context, Türkiye continues to increase cooperation opportunities by supporting requesting countries in various fields, such as developing the institutional capacities of the state in its relations with African countries, ensuring a secure environment, protecting the territorial integrity of states, strengthening political stability, and ensuring an effective fight against terrorism. Türkiye consolidates its relations with African countries by not neglecting soft power tools in its relations with Africa but by transforming them towards smart power. Therefore, Türkiye has a strengthened partnership potential with African countries in the long run. As one of the issues raised by this situation, concrete steps towards common defense and security policies keep relations at a strategic level and reveal stronger partnerships for the future.

MAIN DYNAMICS IN TÜRKİYE-AFRICA RELATIONS

Humanitarian diplomacy is at the forefront of the main dynamics of Türkiye-Africa relations, which are built on historical foundations. However, without ignoring humanitarian diplomacy, the dynamics of today's relations also constitute the dimensions of economy, culture, and security. Türkiye establishes its relations to increase cooperation by developing trade in Africa and seeing a win-win understanding. Türkiye makes efforts to support the capacity building of its partners by evaluating trade and the potential of the continent to improve its relations with African countries. The most concrete reflection of this situation is that the total trade volume with Africa, which was \$5.4 billion in 2003, increased to \$34.5 billion in 2021 and had a value of more

than \$37 billion in the first 10 months of 2022.¹ As a matter of fact, in the Türkiye-Africa Economy and Business Forum organized by Türkiye in 2021, there was progress toward the target of foreign trade volume of \$50 billion, which is planned to be reached in the short term.² In line with this goal, Türkiye has been developing bilateral relations by increasing cooperation opportunities with the Antalya Diplomacy Forum, the Türkiye-Africa Economy and Business Forum, and the Türkiye-Africa Partnership Summit, which have been held regularly in recent years, with visits at the level of the leader and the Ministry of Foreign Affairs.

FIGURE 1: TRADE VOLUME BETWEEN TÜRKİYE AND AFRICA (2003-2022)

Years	Trade Volume with Africa (billion \$)	Rate of Change in the Table Compared to the Previous Period (%)	Total Foreign Trade Volume of Türkiye (billion \$)	Africa's Share in Türkiye's Total External Trade (%)
2022	37.1	7.5 increase	404.6	9.1
2021	34.5	36.3 increase	496.7	6.9
2020	25.3	12.9 increase	389.1	6.5
2019	22.4	1,3 increase	391.1	5.7
2018	22.7	16.9 increase	408,2	5.7
2013	21.4	43.5 increase	422.2	4,7
2008	14.6	170 increase	339.9	4.2
2003	5.4	25.8 increase	116.5	4.6

Source: TÜİK, Dış Ticaret İstatistikleri, <https://data.tuik.gov.tr/Bulten/Index?p=Dis-Ticaret-Istatistikleri-Agustos-2022-45543#:~:text=Genel%20ticaret%20sistemine%20g%C3%B6re%20 ihracat%202022%20y%C4%B1%C4%B1%20Ocak%20DA%C4%9Fustos%20d%C3%B6nem-inde,43%20milyon%20dolar%20olarak%20ger%C3%A7ekle%C5%9Fti>, Dışişleri Bakanlığı, Türkiye-Afrika İlişkileri, <https://www.mfa.gov.tr/Turkiye-afrika-iliskileri.tr.mfa> , (Accessed: December 7, 2022).

On the other hand, Türkiye strives to increase the security and institutional capacity of the state as well as economic development by providing support for the development of African countries and the continent in line with its purpose. In addition, the relations established with the legitimate governments of the continental countries, the aid to the other countries, and the positive attitudes of the people toward the projects carried out in the countries led to the formation of positive agendas in Türkiye's relations with the continent. In this context, in addition to the institutional support of Türkiye regarding the goals of supporting the protection of the territorial integrity of states in Africa, it is also possible to train local elements to ensure security in Somalia,

1 TÜİK, Dış Ticaret İstatistikleri, Ülke GRUPLARINA Göre Dış Ticaret, <https://data.tuik.gov.tr/Bulten/Index?p=Dis-Ticaret-Istatistikleri-Ekim-2022-45545> (Accessed: December 8, 2022).

2 DEİK, "Afrika İle Ticarete Hedef 75 Milyar Dolar", <https://www.deik.org.tr/basin-aciklamalari-afrika-ile-ticarete-hedef-75-milyar-dolar>, (Accessed: December 8, 2022).

thanks to the presence of the TURKSOM military training base in Somalia. In addition, cooperation is increased by signing agreements in defense and security with countries in different sub-regional systems such as North Africa, West Africa, and Central Africa. In this context, at least 20 countries in Africa have cooperated with Türkiye in the defense industry and purchased weapons and military vehicles.³ Therefore, due to the terrorist incidents that have occurred in the region in recent years and the reflections of conflicts arising from separatist movements, the continental countries continue their efforts to ensure their security by obtaining arms. In this way, cooperation increases when African countries aim to maintain their existence by preserving their sovereignty, lands, and national integrity, and Türkiye's opportunities provide a favorable environment.

FIGURE-2: PROMINENT COUNTRIES IN THE EXPORT OF DEFENSE INDUSTRY PRODUCTS TO AFRICAN COUNTRIES

Country	Land Forces	Air Forces	Naval Forces
Uganda	· Katmerciler Hızır Tactical Wheeled Armoured Vehicle (TWAV)		
Morocco	· Nurol Ejder Yalçın (TWAV)	· Baykar Bayraktar TB2 UCAV	
Niger	· MKE Bora-12 Sniper Rifle · PMT76 machine gun	· Baykar Bayraktar TB2 UCAV · Hürkuş Airplane	
Ghana	· Otokar Cobra I & II (TWAV) · Aselsan Şahingözü Electro-Optic · ACAR Surveillance Radar		
Somalia	· MKE PMT76 machine gun · PMT76 machine gun · BMC Kirpi (TWAV) · BMC AKTAN tanker · Hızır 4X4 (TWAV)	· Baykar Bayraktar TB2 UCAV	
Chad	· MKE Bora-12 Sniper Rifle · PMT76 machine gun · Nurol Ejder Yalçın (TWAV) · Nurol Yörük (TWAV)		
Kenya	· Katmerciler Hızır (TWAV)		
Mauritania	· MKE Bora-12 Sniper Rifle · PMT76 machine gun		
Senegal	· MKE KNT76 Sniper Rifle · Ejder Yalçın (TWAV) · Ejder TOMA · Cobra II (TWAV)		

3 Ahmet Alemdar, "Rekabetçi Afrika Pazarında Türk Savunma Sanayiinin Artan Varlığı", *Kriter*, Yıl 6, Sayı 63, December 2021, <https://kriterdergi.com/dosya-afrikada-Turkiye/rekabetci-afrika-pazarinda-turk-savunma-sanayiinin-artan-varligi>, (Accessed: December 8, 2022); Ahmet Alemdar, "Katmerciler'den Gambiya'ya HIZIR zırhlı araç ihracatı!", *Defence Turk*, <https://www.defenceturk.net/katmercilerden-gambiyaya-hizir-zirhli-arac-ihracati>, (Accessed: December 8, 2022).

Tunisia	· BMC Kirpi · Nurol Ejder Yalçın · Katmerciler- Tank carrier lowbed trailer · Katmerciler Fuel Tanker · Aselsan electro optic (observation) systems	· TUSAŞ Anka-S UCAV	
Burkina Faso	· MKE Bora-12 Sniper Rifle · PMT76 machine gun · MEMAT mine disposal İKA	· Baykar Bayraktar TB2 UCAV	
Mali	· MKE Bora-12 Sniper Rifle · PMT76 infantry rifle		
Nigeria	· Asisguard SONGAR armed drone · Canik M2 QCB 12.7 mm heavy machine gun · Cobra (TWAV)	· Aselsan Aselpod targeting pod · T129 ATAK attack helicopter	· Offshore GuardShip
Algeria	· Otokar Cobra (TWAV)		
Rwanda	· Otokar Cobra (TWAV)	· Baykar Bayraktar TB2 UCAV	
Ethiopia		· Baykar Bayraktar TB2 UCAV	
Ivory Coast	· Otokar Cobra II · Nurol Ilgaz		
Central African Republic	· Otokar Cobra (TWAV)		
Libya	· BMC Kirpi II (TWAV) · BMC Vuran (TWAV) · Katmerciler 4x4 Armoured Ambulance · Katmerciler KIRAÇ Criminal Investigation Vehicle	· Baykar Bayraktar TB2 UCAV	
Djibouti		· Baykar Bayraktar TB2 UCAV	
Togo	· MEMAT mine disposal İKA	· Baykar Bayraktar TB2 UCAV	
Gambia	· Katmerciler Hızır (TWAV)		

Source: Ahmet Alemdar, "Rekabetçi Afrika Pazarında Türk Savunma Sanayisinin Artan Varlığı", *Kriter*, Yıl 6, Sayı 63, Aralık 2021, <https://kriterdergi.com/dosya-afrikada-turkiye/rekabetci-afrika-pazarinda-turk-savunma-sanayisinin-artan-varligi>, [Accessed: December 8, 2022] ; Ahmet Alemdar, "Katmerciler'den Gambiya'ya HIZIR zırhlı araç ihracatı!", *DefenceTurk*, <https://www.defenceturk.net/katmercilerden-gambiyaya-hizir-zirhli-arac-ihracati>, [Accessed: December 8, 2022]

RISKS, OPPORTUNITIES, AND PRIORITIES

Türkiye's relations with African countries in the field of security, considering the effects of global events on Africa, bring along various opportunities and risks. Recently, Russia's relations with Africa have been interrupted by the effects of the Ukraine crisis. Therefore, Russia needs more of the tools and human resources it needs for the war. For this reason, Russia's engagement in

Africa has decreased. As anti-French sentiment increased in West Africa, the influence of Russian mercenary groups in the region increased. This risk is expected to continue in the upcoming period as well. Türkiye's relations with African countries can potentially fill the power gaps arising from Russia and France. It can keep Türkiye's window of opportunity open with the defense industry products that have left their mark in the last period.

MAM series smart ammunition is most likely to be exported to countries that already import UAV systems, which is one of the most critical advantageous issues for Türkiye. This situation makes both economic and long-term cooperation opportunities possible. Although low in number, large platforms such as ships for African countries, remote-controlled weapon systems, radar, sensors, and sub-system exports are also carried out, and exports are realized with a wide range of products. On the other hand, in addition to the intense demand for Bayraktar TB2s, TAI has signed contracts with undisclosed African countries to export both ANKA and AKSUNGUR UAV systems.⁴ In addition, it is expected that the name of the naval systems and platforms developed by Türkiye, including the unmanned surface vehicles (USV), will be heard more frequently next year. Especially for 39 African countries with coasts, these platforms are an important system that can cooperate and provide mutual benefit. In short, African countries' interest in Turkish defense industry products is expected to continue to increase in 2023. All these developments increase Türkiye's competitiveness in African and global security and economic markets. Therefore, such critical technological developments create advantages for Türkiye at the global level as well as in Africa.

On the other hand, for Türkiye, a critical window of opportunity in Africa has been opened in Somalia. In this context, the UNSC's exemption of Türkiye from the arms embargo on Somalia has reached dimensions that will significantly and positively impact Somalia and regional security. However, this situation brings with it potential threats for Türkiye. The existing bad governance and economic backwardness in African countries may lead to the possibility of radicalization of the local population by terrorist organizations by attracting these people to certain regions. Therefore, it is possible that terrorist organizations, which have been effective in Somalia, Mali, the



Türkiye's relations with African countries can potentially fill the power gaps arising from Russia and France.

⁴ "TUSAŞ'tan 1 Milyar Dolarlık Platform İhracatı", December 6, 2022, <https://www.savunmasanayist.com/tusastan-1-milyar-dolarlik-platform-ihracati/>, (Accessed: December 11, 2022).

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“As Türkiye, we adore the African continent. We adore African countries and their people greatly. We don’t just express this with words. We display it with all our actions.”

Mevlüt Çavuşoğlu

Minister of Foreign Affairs of Türkiye

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Central African Republic, Nigeria, and Kenya, could target Türkiye because of the defense industry products sold by Türkiye. In addition, attempts to target Turkish investments or citizens in the region are a significant risk factor. Türkiye must sign more training agreements with legitimate governments to increase military capacity in the face of these risks. Since terrorism is regionally permeable, the general increase in terrorist activities in East Africa, West Africa, and the Sahel Region and the risk of Türkiye being affected by these attacks should not be ignored.

Therefore, in line with the principles that Türkiye constantly emphasizes and implements, such as non-interference in internal affairs, avoidance of discrimination and equality, and the international community’s action to ensure unity in African countries with certain principles will reduce the risk environment in the continent and provide more windows of opportunity.

DEFENSE INDUSTRY AND POLICY



Rifat Öncel

09



SUMMARY OF 2022

- 1 The test and training ship TCG UFUK entered the inventory in January, which is also defined as the first intelligence ship of Türkiye.
- 2 Türkiye and the UAE signed a letter of intent and a memorandum of understanding on defense cooperation. It was claimed that the UAE ordered 120 Bayraktar TB2 drones.
- 3 Türkiye's request from the United States for the purchase of 40 F-16 Block 70 aircraft and 79 modernization kits remained inconclusive.
- 4 Türkiye signed defense and military cooperation agreements with countries from Europe, Africa, Asia, the Middle East, and Latin America while defense exports continued their upward trend.

The test and training ship TCG UFUK, also defined as the first intelligence ship of Türkiye, entered the inventory in January. The ship is based on the hull design of the Ada class corvette and it is part of the MİLGEM Project, which aimed at developing national naval platforms with a maximum contribution by Turkish firms. The TCG UFUK can navigate without interruption for 45 days under harsh climate and sea conditions.

Türkiye began using the Aselsan-produced Common Aperture Targeting System (CATS) in its drones after Canada imposed an embargo on Türkiye regarding the drone cameras. Relatedly, in October, the BAYRAKTAR TB2 entered the inventory of the Coast Guard Command for the first time with the delivery of six drones with CATS cameras.

Türkiye and the UAE signed a letter of intent and memorandum of understanding on defense cooperation, which seems to be an important part of the ongoing reconciliation efforts between the two countries. The reports suggested that the UAE purchased 120 Bayraktar TB2 drones from Türkiye and 20 of them have already been delivered.

Some Russian official sources claimed that Türkiye and Russia signed an agreement regarding the sale of the second batch of the S-400 air defense missile system, but the SSB denied the claims. It was reported that Turkish officials underlined the timing of the Russian claims, which emerged when a Turkish committee went to the U.S. to request Turkish F-16 modernization.

The SAMP-T air defense missile system has occasionally been mentioned in Turkish defense industry procurement plans but whether the system will enter into Turkish inventory continued to remain highly ambiguous.

Türkiye continued to invest in defense and industrial cooperation as well as military cooperation as part of its foreign policy. Throughout the year, Türkiye

signed defense and military cooperation agreements with various countries from Europe, Africa, Asia, the Middle East, and Latin America.

MAIN DYNAMICS

Diplomatic Reconciliation and Drone Diplomacy



Türkiye and the UAE have been in talks since March 2022 regarding the sale of drones and the possible UAE request would be the delivery of 120 drones worth a total of \$2 billion.

In recent years, the rise of the indigenous defense industry has also transformed into an important diplomatic instrument for Turkish foreign policy.

Recently, it has seemed to play a significant role in the reconciliation between Türkiye and the United Arab Emirates. During visits and negotiations, the two countries signed a letter of intent and a memorandum of understanding on defense cooperation. It was claimed that Türkiye delivered 20 BAYRAKTAR TB2 drones to the UAE in September and both countries agreed for more in line with the détente process.¹ It was also reported that Saudi Arabia also wants to buy drones and seeks to establish a manufacturing facility for drones.² Previously, another source claimed that Türkiye and the UAE have

been in talks since March 2022 regarding the sale of drones and the possible UAE request would be the delivery of 120 drones worth a total of \$2 billion.³ Reports suggest that the UAE opts for Turkish drones due to its failure in gaining U.S. approval for the sale of Reaper drones.⁴

Defense and Military Cooperation & Defense Exports

The Russian aggression in Ukraine facilitated closer relations between Türkiye and East European and Baltic countries mostly because of Türkiye's influential role in the war. Against this backdrop, for instance, Türkiye signed a letter of intent

1 Orhan Coşkun, "Exclusive: Türkiye sells battle-tested drones to UAE as regional rivals mend ties," *Reuters*, (September 21, 2022), retrieved from <https://www.reuters.com/world/middle-east/exclusive-turkiye-sells-battle-tested-drones-uae-regional-rivals-mend-ties-2022-09-21/>

2 Orhan Coşkun, "Exclusive: Türkiye sells battle-tested drones to UAE as regional rivals mend ties," *Reuters*, (September 21, 2022), retrieved from <https://www.reuters.com/world/middle-east/exclusive-turkiye-sells-battle-tested-drones-uae-regional-rivals-mend-ties-2022-09-21/>

3 Ragip Soylu, "Bayraktar TB2: UAE in talks to buy large number of armed drones from Türkiye," *Middle East Eye*, (September 8, 2022), retrieved from <https://www.middleeasteye.net/news/bayraktar-tb2-uae-turkiye-talks-buy-large-number-drones>

4 "BAE'den Türkiye'ye Milyar Dolarlık SİHA Teklifi," *Savunmasanayist*, November 17, 2022, <https://www.savunmasanayist.com/bae-sirketinin-standinda-turk-muhimmatlari-sergilendi/>

on defense industrial cooperation with Lithuania on June 1. It was also remarkable that Lithuania launched a fundraising campaign to purchase Bayraktar TB2 drones for the Ukrainian armed forces after the drone's significant battlefield successes. Baykar did not accept the money and delivered the drone free of charge.

Similarly, letters of intent on defense industrial cooperation or relevant defense and military cooperation agreements with other countries such as the UAE, the Democratic Republic of Congo, Brazil, Indonesia, Kosovo, and Bangladesh were signed. Particularly, Türkiye and Indonesia have deepened their defense cooperation this year with new arrangements and agreements. For instance, Indonesia chose to purchase the KHAN missile, the export version of the BORA ballistic missile, which marked the first export of the product. The policy aims at leveraging modern and cost-effective defense products for achieving wider foreign policy objectives.

Turkish defense exports continued their upward trend this year as the number of countries that purchased Turkish defense products has passed 170 and more than 230 defense products were exported.⁵ In April, two ATAK T129 helicopters were delivered to the Philippines army inventory, which marked the first export success of the platform. Türkiye will deliver an additional four helicopters to the Philippines as part of the contract. The head of the producer company Temel Kotil stated that the Philippines has also submitted new orders.⁶ In early September, Baykar CEO Haluk Bayraktar said the company has produced more than 400 Bayraktar TB2 (with export to 24 countries – the most exported drone in the world) and 20 Bayraktar AKINCI so far. He maintained that Baykar can produce 200 Bayraktar TB2s in a year and they are planning to increase the capacity to 500 units in addition to 40 Bayraktar AKINCIs annually. Bayraktar also said that Baykar has a three-year backlog of orders and that 98% of the company revenue comes from exports.⁷

TÜRKİYE'S DEFENSE INDUSTRY IN 2023

One of the most important issues in the coming period seems to be the F-16 case. Despite the Biden Administration's supportive statements, the technical talks between the two countries are still ongoing. While the senior officials

⁵ "Başkan Demir: Savunma Sanayisi Ürünleri İhraç Ettiğimiz Ülke Sayısı 170'i Geçti," SSB, 9 Ağustos 2022, <https://www.ssb.gov.tr/WebSite/contentList.aspx?PageID=4318&LangID=1>

⁶ "ATAK Helikopteri Filipinler Ordusuna Güç Verecek," SSB, 6 Nisan 2022, <https://www.ssb.gov.tr/WebSite/contentList.aspx?PageID=4198&LangID=1>; "Türk Savunma Sanayiinde İhracatta 'ATAK' Zamanı," SSB, 6 Nisan 2022, <https://www.ssb.gov.tr/WebSite/contentList.aspx?PageID=4197&LangID=1>

⁷ Goksel Yildirim, "Turkish Bayraktar TB2 drone being exported to 24 countries," AA, (September 1, 2022), retrieved from <https://www.aa.com.tr/en/economy/turkish-bayraktar-tb2-drone-being-exported-to-24-countries/2674313>

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“We aim to become one of the leading countries in the world in this field (unmanned naval vehicles) as well by using the experience and success we have gained in armed unmanned aerial vehicles.”

”

Prof. Dr. İsmail Demir

SSB President

from both governments are positive about the outcome, key individuals in the U.S. Congress supported by the Greek lobby continue their veto threats over the sale. Therefore, it is highly likely that unless the Biden Administration exerts concrete pressure, the conclusion of the F-16 procurement will be a long process.

Defense industry exports will likely remain on an upward track as more countries begin showing interest in Turkish products. For instance, in September, it was reported that Romania was seeking to procure 18 Bayraktar TB2 drones for a worth of \$300 million.⁸ Similarly, the signing of defense and military cooperation agreements facilitates exports by creating more confidence in bilateral relations and paving the way for effective mechanisms to deal with financial and bureaucratic issues regarding the process.

Similarly, the role of the defense industry in Turkish foreign and security policy will likely increase as the country is in the process of normalization of its relations with some Middle Eastern countries. Countries such as the UAE and Saudi Arabia have long been known to be interested in Turkish defense products and the latest reports state that Saudi Arabia wants to build a drone factory for Bayraktar TB2 production similar to Ukraine. The domestic political scene and international conjecture support reconciliation in Turkish foreign policy, which would likely pave way for more role of Turkish defense diplomacy.

8 “Romania wants to buy 18 Turkish Bayraktar TB2 UCAVs for \$300M,” *Daily Sabah*, (September 1, 2022), retrieved from <https://www.dailysabah.com/business/defense/romania-wants-to-buy-18-turkish-bayraktar-tb2-ucavs-for-300m>

TÜRKİYE'S COUNTERTERRORISM STRATEGY



Sibel Düz

10



SUMMARY OF 2022

1

On April 18, 2022, the Turkish Armed Forces (TAF) launched a military operation inside northern Iraq dubbed Claw-Lock.

2

In May, it was announced that Türkiye is preparing to launch a new military operation in northern Syria.

3

On November 20, 2022, the Turkish Air Forces launched a series of airstrikes – dubbed Claw-Sword – hitting the targets located in the Qandil, Asos, and Hakurk regions in the north of Iraq and the Ain al-Arab, Tal Rifaat, Jazire, and al-Malikiyah regions in the north of Syria. PKK targets in Ain al-Arab were targeted for the first time with a comprehensive air campaign.

Since 2019, Türkiye has extended the scope of military operations targeting the PKK. In 2022, Türkiye has multiplied its cross-border operations and counterterrorism operations in terms of operational area and intensity. With the Winter Eagle Air Operation carried out on February 2 – in which combat aircrafts departing from six different bases, as well as tanker planes, airborne early warning and control planes, and UAVs/UCAVs were deployed – shelters, caves, tunnels, ammunition depots, so-called headquarters and training camps in the al-Malikiyah, Sinjar, and Karajak regions were destroyed.¹ Subsequently, following the PKK's bomb attack in Istanbul, on April 18, it was announced that the Turkish Armed Forces (TAF) launched Operation Claw-Lock by land and air against terrorist targets in the Metina, Zap, and Avasin-Basyan regions in northern Iraq.² On November 20, in addition to combat aircraft, UAVs/UCAVs and nearly 70 aircraft were deployed in Operation Claw-Sword targeting Qandil, Asos, and Hakurk in the north of Iraq, and Ain al-Arab, Tal Rifaat, Jazire, and al-Malikiyah in the north of Syria. It was announced that during the operation, 326 terrorists were neutralized.³

By the Claw Operation series, the terrorist hideouts in northern Iraq were targeted over a region covering Hakurk, Sinath-Haftanin, Sinjar, Karajak, Qandil, Zap, Avasin-Basyan, Gara, and Metina. Operation Claw-Sword, the latest in the Claw Operation series, aims to extend Türkiye's forward military presence and gradually offer affordances for a new ground operation in Syria.

1 "Terör yuvalarının vurulduğu 'Kış Kartalı Harekatı'nın detayları ortaya çıktı", *Anadolu Agency*, February 2, 2022, <https://www.aa.com.tr/tr/gundem/teror-yuvalarinin-vurulugu-kis-kartali-harekatinin-detaylari-ortaya-cikti/2491921>

2 "Kuzey Irak'ta 'Pençe-Kilit' harekatı", *NTV*, April 18, 2022, <https://www.ntv.com.tr/Türkiye/son-dakika-haberimb-pence-kilit-operasyonu-basladi,x2LMJpbmW0GI8NJqv8nZOg>

3 "Milli Savunma Bakanı Akar: Pençe-Kılıç Harekatı'nda 326 terörist etkisiz hale getirildi", *Anadolu Agency*, November 25, 2022, <https://www.aa.com.tr/tr/gundem/milli-savunma-bakani-akar-pence-kilic-harekatinda-326-terorist-etkisiz-hale-getirildi/2747711>

MAIN DYNAMICS

A new synthesis of hard power and defense industry-empowered Türkiye has helped the country to reassert its own interests concerning its counterterrorism policy. The aforementioned cross-border military operations are the culmination of efforts to prioritize the deterritorialization of the PKK's sphere of control and influence, the discontinuation of the organization's economic sustainability, the destruction of the organization's chain of command and control which has yielded military influence, effectiveness, and penetration.

Regarding deterritorialization of the PKK's sphere of control and influence, Türkiye has recently conducted an operation in the Zap region in Iraq, one of the last pockets of resistance under PKK control, aiming to control the Derelük-Sheladize line and to cut off the connection of Gara with the Zap region.

⁴ Concerning the efforts to cease the organization's economic sustainability, during Operation Claw Sword, by targeting al-Saidaa, al-Ouda, al-Bahra, al-Khatuniah, Ali Agha, Suwaydiyah, and Molla Abbas oil and gas facilities in northeastern Syria, the TAF elevated the target status of the PKK/YPG's energy resources in Syria for financing terrorism to high priority targets.⁵ Lastly, by destroying the organization's chain of command and control, Turkish security forces are expecting an organizational collapse because it is believed that a leader is crucial for organizational planning, agenda and rhetoric setting, and tactic and recruitment maintenance.

Referring to Türkiye's counterterrorism strategy, the combination of two dynamics, such as the efforts to extend the impact of the Claw operations to Syria following the effective results gained in Iraq and the integration of emerging technologies into the counterterrorism strategy, have been the most highlighted issues in 2022.

Extending Claw Operation Series to Syria

Türkiye's new military strategy aims to extend the same approach in Claw Operation Series into Syria with a different way of conduct which is deeper penetration by sensitive operations. Through drone-empowered hard power, Türkiye has become capable of targeting a terrorist asset in the Deir ez-Zor

4 Sibel Düz, "Pençe Kilit Harekatı ve PKK'nın Direnç Cepeleri", *Kriter Dergisi*, May 1, 2022, <https://kriterdergi.com/dis-politika/pence-kilit-harekatı-ve-pkknin-direnc-cepleri>

5 "Turkish strikes hit oil installations in northern Syria, sources say", *Reuters*, November 24, 2022, <https://www.reuters.com/world/middle-east/turkish-strikes-hit-oil-installations-northern-syria-sources-say-2022-11-24/>

region, 70 kilometers away from the Turkish border.⁶ Successive ground operations like in northern Iraq may not be implemented in Syria due to the complex political environment. Hence, Türkiye maintains sensitive operations through its indirect fire or pinpoint targeting capabilities.

On a side note, Operation Claw-Sword is proof that Türkiye aims to sustain a simultaneous engagement approach in different theaters. With its series of airstrikes hitting the targets both in northern Iraq and Syria, Türkiye illustrates that its counterterrorism efforts in Iraq cannot be separated from its efforts in Syria.

Emerging Technologies' Integration into the Greater Strategy of Counterterrorism

Integration of emerging technologies in smart munitions and UAVs into counterterrorism operations has emerged as a new tool. Loitering munitions, kamikaze drones, and smart munitions are now integrated into the greater strategy of counterterrorism. For example, Türkiye has reportedly used its new Baykar Akinci UCAV in Operation Claw-Lock for the first time.⁷ Moreover, during Operation Claw-Sword, TAI Aksungur UAV was spotted in the sky.⁸ Kargu rotary wing loitering munition manufactured by STM was operational during Operation Claw-Sword, as well.⁹ Also, Operation Claw-Sword is an important milestone in terms of demonstrating Türkiye's guided kit capability.¹⁰ TEBER guidance kit enhancing the hit capability of MK-81 and MK-82 general-purpose bombs was used during the operation. Indeed, the TEBER guidance kit increases the ability of a bomb to conduct a high-precision strike by converting it into a smart weapon system through the incorporation of an Inertial Navigation System (INS), a Global Positioning System (GPS), and a Laser (SAL) Seeker.¹¹

Worthwhile progress has been reached in developing medium- and long-range kamikaze drones such as the KARGI anti-radiation UAV by LEN-

6 Twitter Post, *North Press Agency*, 22 November 2022, https://twitter.com/NPA_English/status/1595044045956554754?s=20&ct=KvTB_QJxv_eNGhcQCDi5uQ

7 Twitter Post, *Clash Report*, 28 April 2022, <https://twitter.com/clashreport/status/1519634967717896192?s=20&ct=ekDjOnqyIaKAWJwW3Rc22Q>

8 "Turkish Aksungur UAV in Syria Operation", *Özel Harekat Tv*, 23 November 2022, https://www.youtube.com/watch?v=6pgBxOBODH4&ab_channel=%C3%96zelHarekatTv

9 Twitter Post, *Sibel Düz*, November 30, 2022, <https://twitter.com/BelleDuez/status/1597904912394121216?s=20&ct=nVksX-XnMqoJdjKNgayl2A>

10 "Pençe-Kılıç Harekatı: Mühimmatlar nasıl 'akıllandırılıyor'?", *TRT Haber*, November 20, 2022, <https://www.trthaber.com/haber/gundem/pence-kilic-harekatı-muhimmatlar-nasil-akillandiriliyor-724845.html>

11 Roketsan, "Teber Güdüm Kiti", <https://www.roketsan.com.tr/tr/urunler/teber-gudum-kiti>

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“We are working for the safety of our country and nation, our 85 million citizens and our borders. In this sense, our fight against terrorism continues and we state that we will continue the fight until the last terrorist is eliminated.”

Hulusi Akar

Minister of National Defense of Türkiye

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TATEK, the FEDAI loitering munition system by Transvaro, the DELİ hand-held fixed-wing small UAV by Titra and the ŞİMŞEK target drone system by TAI.¹² During future counterterrorism operations, it is expected that these platforms and systems will provide Turkish security forces with a highly targeted strike capability.

TÜRKİYE'S COUNTERTERRORISM POLICY IN 2023

Conventional wisdom suggests that removing key leaders may substantially weaken a terrorist organization and operation capacity by decimating command and control. Therefore, prioritization of targeting the leaders and disruption of the PKK's logistical lines of support, and minimization of maneuverability will continue to be perceived as an effective strategy.

On the flip side, the suicide attack on The Tece Police House in Mersin on September 26 and the bomb attack on İstiklal Street in Istanbul on November 13, are considered a reflection of the PKK's attempts to destabilize the current security environment in Türkiye by re-enacting the violence of the terrorist organization and re-channeling the direction of the violence to Türkiye. It was understood that the two female perpetrators of the Mersin attack came to Tarsus from Manbij by paramotor.¹³ Similarly, Ahlam Albashir, a Syrian national who was determined to have left the explosive-laden package in the

¹² <https://twitter.com/Dromercay/status/1567971504729763840>

¹³ “İçişleri Bakanı Soylu: Mersin'deki eylemi gerçekleştirenler motorlu paraşütle Münbiç'ten Tarsus'a geldi”, *Anadolu Agency*, October 1, 2022, <https://www.aa.com.tr/tr/politika/icisleri-bakani-soylu-mersindeki-eylemi-gerceklestirenler-motorlu-parasutle-munbicten-tarsusa-geldi/2700268>

attack on İstiklal Street took the order for the attack from the network in Ain al-Arab.¹⁴ These prove that the current presence of the PKK/YPG in Syria has become an increasing security threat. The PKK's recruitment tactic – choosing mostly female Syrian nationals and new recruits – also has emerged as a new phenomenon. As it is expected to bring about a deficiency in Türkiye's security environment, the PKK may instrumentalize this recruitment tactic to gain the advantage of unpredictability in 2023.

Lastly, the PKK/YPG presence in Syria remains unresolved. Türkiye's leverage over Sweden and Finland's NATO membership and expectations of a new Turkish military operation in northern Syria will challenge the U.S.' adherence to the PKK/YPG. However, to predict whether a ground operation will be carried out or not is difficult given that the limited contact between Damascus and Ankara may change the calculus on the ground.



Türkiye's leverage over Sweden and Finland's NATO membership and expectations of a new Turkish military operation in northern Syria will challenge the U.S.' adherence to the PKK/YPG.

¹⁴ "Bir bakışta: Beyoğlu'ndaki terör saldırısı", *Anadolu Agency*, November 18, 2022, <https://www.aa.com.tr/tr/gundem/bir-bakista-beyoglu-ndaki-teror-saldirisi/2742269>

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SETA SECURITY RADAR

TÜRKİYE'S GEOPOLITICAL LANDSCAPE IN 2023

Edited by Murat Yeşiltaş, Bilgehan Öztürk

Türkiye is at the center of a series of geopolitical, security, and destabilizing challenges ranging from the war in Ukraine, the fragile peace in the southern Caucasus, widespread mass protests in Iran, terror threats from northern Iraq and northern Syria, Türkiye-Greece tension over the Aegean and Eastern Mediterranean to the negative impacts of the more global and transnational issues such as great power politics, economic impacts of the global pandemic and mass irregular migration that exacerbate the existing challenges. In line with such a challenging environment, Türkiye puts up certain coping mechanisms and policies to mitigate the damaging impacts of the said risks and challenges and strives to seize opportunities that might arise out of crises as much as possible.

In this new volume of SETA Security Radar, we analyze the main dynamics shaping Türkiye's security and geopolitical landscape with references to the most significant foreign policy and security issues throughout 2022. Since Türkiye does not navigate in a vacuum we also take stock of the regional and global contexts of the issues of highest concern and preoccupation for Türkiye. Based on our assessment of the dynamics and developments defining Türkiye's security and geopolitical landscape, we predict how these dynamics and developments will pan out" in 2023.

