



TÜRKIYE'S CARDS IN THE WORLD

Raising the stakes

Edited by

Dalia Ghanem

With contributions from

Pinar Akpınar, Ondrej Ditrych,
Rossella Marangio, Bojana Zorić



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EXECUTIVE SUMMARY

Türkiye's footprint in various regions of the world has expanded. This is clear not only in economic terms but also in the country's successful projection of its soft power, as demonstrated by its educational initiatives or in the popularity of Turkish television series with audiences across Africa, the Middle East, the South Caucasus and the Western Balkans. At the hard power end of the spectrum, it is reflected in the growing prominence of Türkiye's TB2 drones in modern battlefields. This confluence of cultural exports and technological advancements paints a picture of a country with clear ambitions: diplomatic prowess, economic expansion, and powerful military capabilities.

However, a closer look reveals a more nuanced reality. Türkiye has to steer a careful and delicate course between national economic anxieties, escalating security concerns and a changing global order. The past two decades have seen Türkiye open up to the abovementioned regions, while recent economic challenges, exacerbated by the Covid-19 pandemic and the war in Ukraine, have pushed Ankara towards closer collaboration with them. This strategic engagement serves a dual purpose for Türkiye: diversifying partnerships to overcome isolation and asserting strategic autonomy by distancing itself from the West, while being careful to maintain connections that serve its interests.

Türkiye's multifaceted and adaptable approach is key to its success. By deploying a diverse 'toolbox' of diplomatic instruments and targeted communication, Ankara has emerged as a significant player in these four regions. This strategy enhances its image as a strong and reliable partner for both elites and the general population.

It is important to note that Türkiye's political landscape has recently shifted dramatically following the local elections on 31 March. The

ruling Justice and Development Party (AKP) is no longer the biggest party in the country, for the first time since its foundation. Conversely, the nationalist Republican People's Party (CHP), which has historically been its rival and foe, has topped the polls for the first time since 1977. Both parties will need to find a way of working together in this altered political setting.

This *Chaillot Paper* is divided into five chapters, dedicated to each region: the Western Balkans; the South Caucasus; the Middle East/North Africa/Gulf; and Africa. While there are regional and country-specific particularities, all chapters focus on Türkiye's growing footprint, analysing its motivations and strategies, as well as potential implications for the European Union.

In chapter 1 on the Western Balkans, Bojana Zorić argues that Türkiye's foreign policy in the Western Balkans is driven by strategic pragmatism based on state interests rather than identity-based considerations, an aspect that has become particularly salient since the resignation of Ahmet Davutoglu as prime minister in 2016. This approach leads Ankara to perform a delicate balancing act in bilateral relations. While effective, it also creates a vulnerability: state-to-state relations can become overly reliant on specific leaders and can thus be potentially short-lived. Despite this focus on bilateral ties, Türkiye's NATO membership remains a cornerstone of regional security and stability. It opens doors for further military cooperation that aligns with both EU and NATO strategic priorities. By working together, the EU and Türkiye can leverage their strengths to create a more secure and prosperous region.

In chapter 2 on the South Caucasus, Ondrej Ditrych examines how Türkiye seeks to capitalise on Russia's weakening influence in the region. He argues that Türkiye pursues its

regional ambitions while being constrained by having to defer to Russia's interests in this part of the world, as well as to those of Azerbaijan, a key ally, in the conflict with Armenia. The complex local geopolitical landscape and Türkiye's own domestic economic challenges impose further constraints. Türkiye's vision of a 'Middle Corridor' that would connect China and Central Asian countries to Türkiye via Azerbaijan exemplifies its ambitions for a transcontinental trade route. But its success hinges on resolving the Armenian–Azerbaijani conflict and improving regional infrastructure. While Türkiye has stepped up its support for Azerbaijan's position, a lasting peace agreement that would benefit all parties remains elusive.

In chapter 3 Dalia Ghanem and Pinar Akpınar examine Türkiye's strategic pivot towards the **Middle East, North Africa and the Gulf** region. This is evident in Ankara's expanding economic ties and efforts to mend strained relations with the Gulf capitals. President Erdoğan, in an effort to shore up his grip on power after his re-election in 2023 and bolster the domestic economy, is prioritising improved ties with oil-rich Gulf states. Türkiye's approach to the MENA region is driven by both economic pragmatism and a broader regional shift. MENA countries, sensing a less engaged Washington and Europe, are seeking new regional partners. The authors note that Arab countries are receptive to Türkiye's narrative of shared history and a relationship based on solidarity and mutual benefits. This strategy coupled with Türkiye's multifaceted approach, which encompasses economic ventures, security cooperation and cultural exchanges, resonates strongly with both Arab leaders and the Arab street. Türkiye's evolving role and

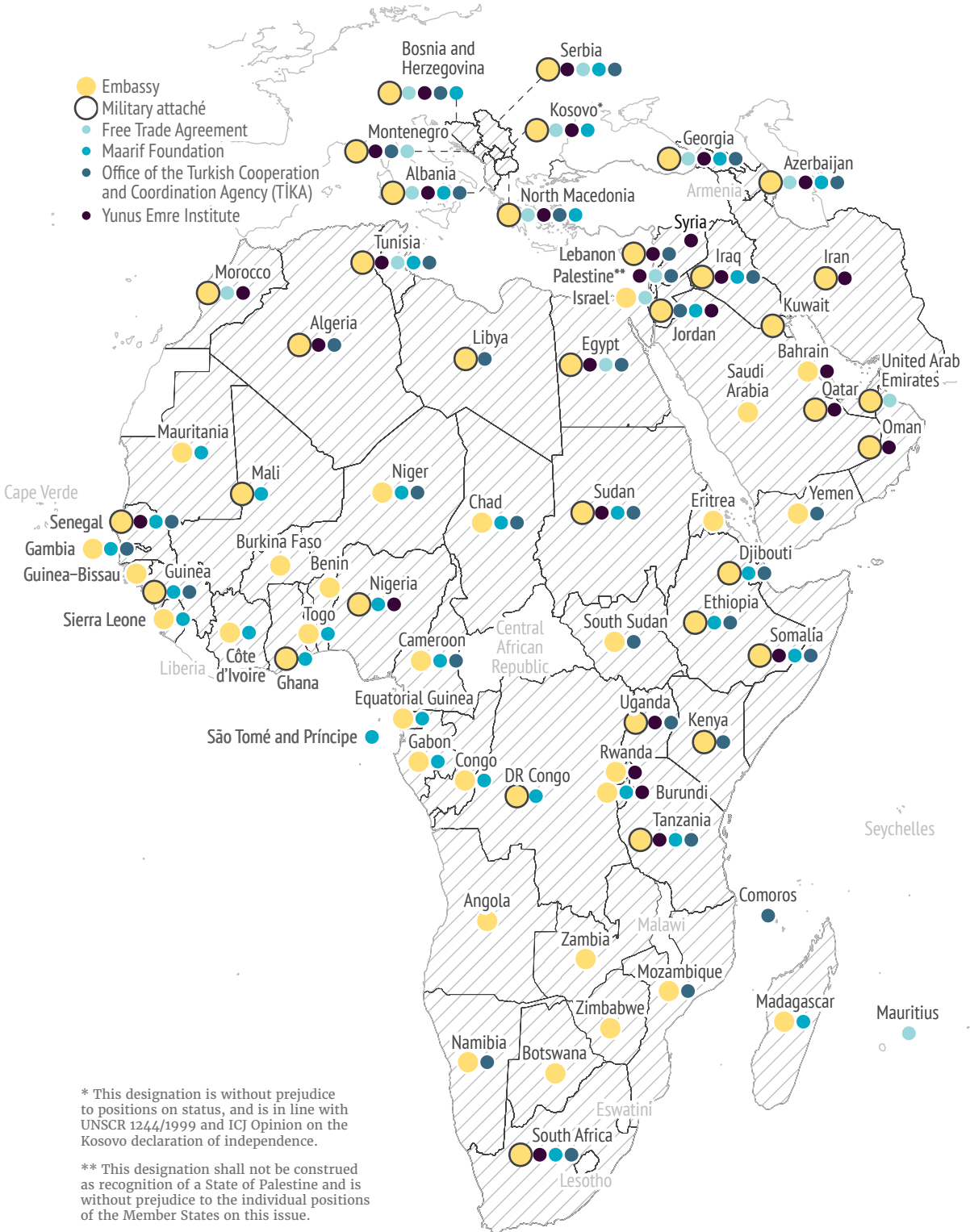
long-term aspirations will significantly shape the region's future.

In chapter 4 on Africa, Rossella Marangio explores Türkiye's expanding presence in sub-Saharan Africa, particularly in the Horn and West Africa. She shows how Türkiye actively pursues economic opportunities and political engagement in areas where other partners are absent. Economic interests, such as securing opportunities for Turkish companies, accessing mineral resources, and tapping into a growing market also fuel Türkiye's engagement on the African continent. The 'win-win' narrative promoted by Ankara is appealing to African partners, particularly when it is paired with economic and security collaboration, humanitarian assistance and cultural exchanges. Recent agreements with Somalia demonstrate Türkiye's ongoing commitment to Africa, albeit with potential limitations on short-term growth linked to domestic economic difficulties.

The concluding chapter offers policy recommendations for the EU. The EU has a vested interest in understanding Türkiye's motivations and strategies, particularly in areas where cooperation aligns with the EU's own goals, such as promoting stability, fostering economic development and addressing shared security concerns. This is especially important in light of Türkiye's increasingly transactional approach to international relations and foreign policy, whereby it prioritises its own interests and negotiates on an *à la carte* basis with each region and partner. By understanding these dynamics and engaging in open and constructive dialogue with Türkiye, the EU can leverage its relationship with the country to lay the foundations for regional stability and prosperity.

Bluff or royal flush?

Türkiye in the Western Balkans, South Caucasus, Middle East, and Africa



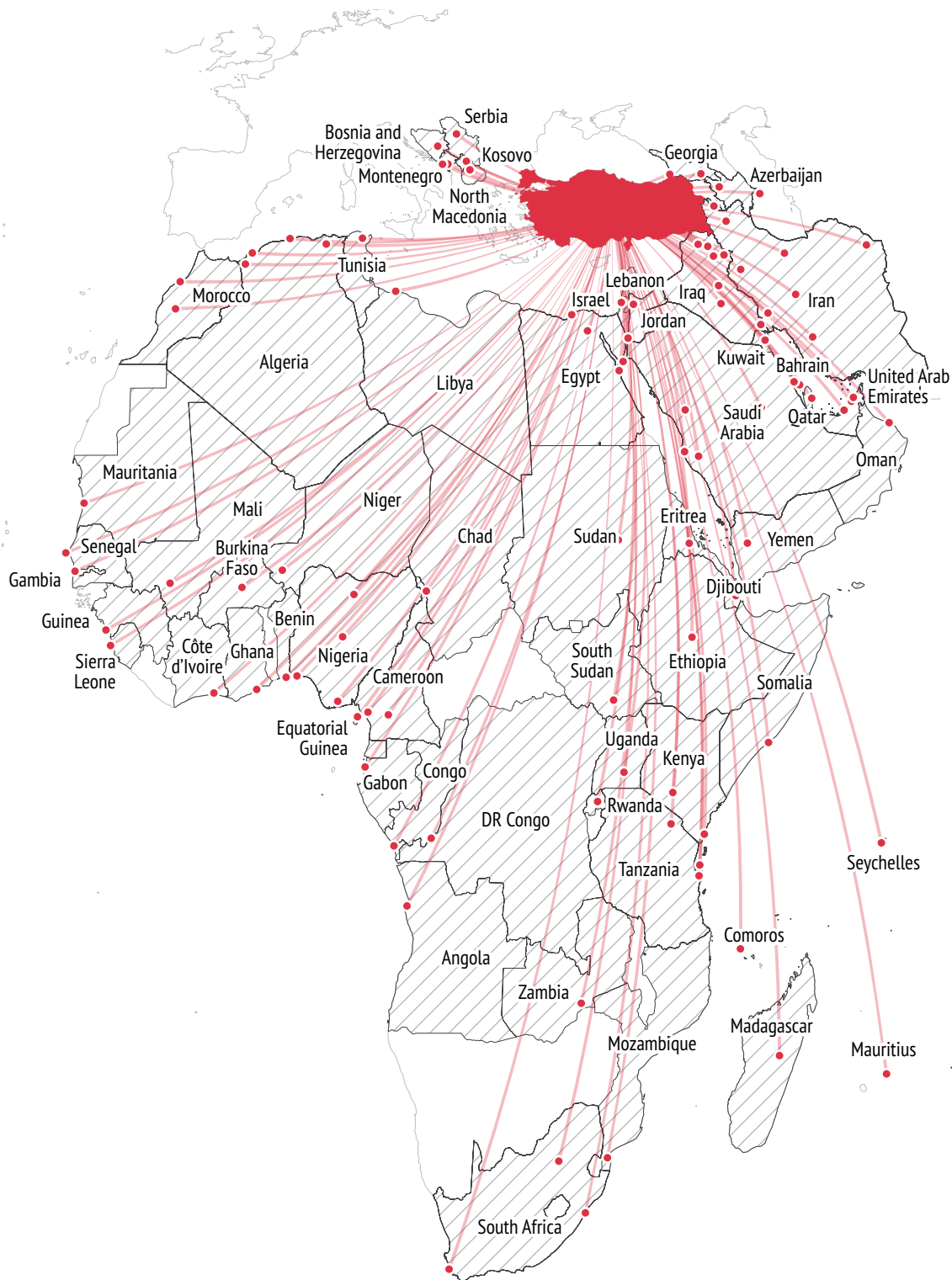
* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and ICJ Opinion on the Kosovo declaration of independence.

** This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the Member States on this issue.

Data: EUISS own collection of data compiled from multiple sources, 2024; European Commission, GISCO, 2024.

Turkish Airlines

Destinations in the Western Balkans, South Caucasus, Middle East and Africa



CHAPTER 1

TÜRKIYE IN THE WESTERN BALKANS

Laying its cards on the table

by
BOJANA ZORIĆ

INTRODUCTION

There is much talk in international circles these days of Türkiye's return to the Western Balkans. In reality, however, Türkiye has never truly been absent from this part of the world: it occupies a central position in the Balkans, geographically, historically and culturally. This shared past, rooted in common experiences of history, religion and culture, forms a key foundation for Türkiye's influence in the region. In the wake of the Balkan wars of the 1990s, Ankara seized the opportunity to actively strengthen its ties with these countries.

Fast-forwarding to 2024, Türkiye remains a crucial partner in the Western Balkans; its geographical location, population size, strategic and military importance through NATO, as well as its political significance, make it a relevant player. Türkiye remains vital for the EU's strategic interest in the Western Balkans, especially due to its support for the Euro-Atlantic aspirations of the countries of the region. Even when domestic politics have led to some shifts in Ankara's foreign policy course, Türkiye has largely maintained a consistent approach on strategic, military and regional matters.

Türkiye acts as a balancing power in the Western Balkans, seeking common ground with all countries of the region based on either shared culture, religion and history or economic and security interests. This chapter therefore argues that Türkiye should be seen as presenting an opportunity rather than a threat for the region. While for the EU, Türkiye has been an unpredictable ally in global affairs, its approach to the Western Balkans has been more straightforward. Ankara has consistently supported the region's Euro-Atlantic integration, peace and stability, as well as regional cooperation. Despite President Recep Tayyip Erdoğan's increasingly authoritarian rule and Ankara's pursuit of a more pragmatic, interest-based and assertive foreign policy, Türkiye has scaled back its neo-Ottoman rhetoric and has not sought to challenge or disrupt the existing security structures. Moreover, the region's ethnically and religiously diverse population makes it difficult for Türkiye to impose its own model of governance.

ECONOMIC POLICIES AT THE SERVICE OF INTERNATIONAL AMBITIONS

Economic relations form a key pillar of Türkiye's diplomatic engagement in the region. Türkiye has built up a strong economic presence, expanding beyond trade to include vital sectors like infrastructure, banking and manufacturing. Despite Türkiye's increased investments, the EU remains by far the dominant economic player in the region. For example, in 2023, the EU accounted for 63.2 % and 56.9 % of Serbian exports and imports, while Türkiye's share was 1.9 % and 4.7 % respectively⁽¹⁾. This significant gap highlights the EU's overwhelming economic influence, both

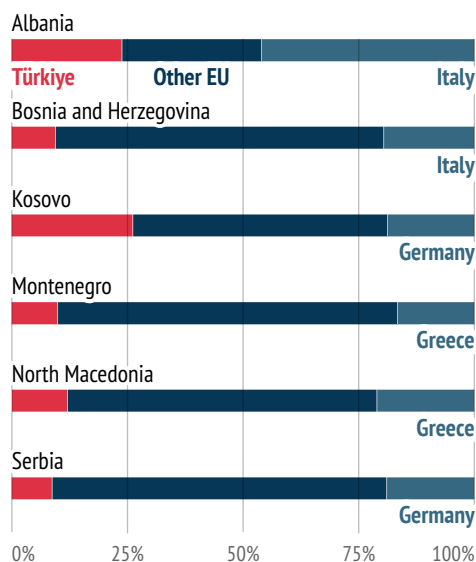
collectively and through individual Member States, eclipsing any potential competition. A similar pattern may be observed for other countries in the region.

Türkiye is well known for its focus on investing in infrastructure development in countries with underdeveloped networks and the Western Balkans are no exception. Turkish companies are playing a significant role in improving regional connectivity. For example, the Turkish construction company Tasyapi is largely financing the Sarajevo–Belgrade highway, a major project that will address longstanding transportation challenges. Previously, the same company played an important role in the reconstruction of the Novi Pazar–Tutin road in the Muslim-dominated Sandžak region in Serbia. Pristina Adem Jashari International Airport was built in 2013 by Turkish–French consortium Limak–Aéroports de Lyon, at a cost of over €140 million. More recently, in

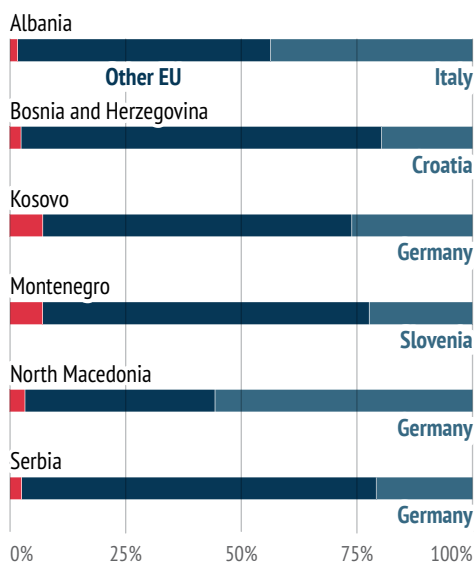
Western Balkans trade spectrum

Turkish and EU trade with the region, € billion, 2022

Imports



Exports



Data: Agency for Statistics of Bosnia and Herzegovina, 2023; European Commission, DG Trade (Albania), 2023; Kosovo Agency of Statistics, International Trade Statistics 2022, 2024; MakStat (State Statistical Office of the Republic of North Macedonia), 2024; Montenegro Statistical Office, 2023; Statistical Office of the Republic of Serbia, 2023

(1) Statistical Office of the Republic of Serbia, External trade statistics, December 2023 (<https://publikacije.stat.gov.rs/G2024/PdfE/G20241020.pdf>).

2023, joint venture Bechtel-ENKA secured a contract to build two new motorways in North Macedonia: corridor 8, connecting the Adriatic and the Black Sea, and corridor 10d, part of the Pan-European Transport Corridor 10 network. A €70 million plant is being built by Sahterm in North Macedonia in 2024 to manufacture tubular heating elements for household appliances.

Furthermore, the Turkish Co-operation and Coordination Agency (TIKA), has consistently provided development aid to the Western Balkans. Bosnia and Herzegovina (€8.02 million), Kosovo⁽²⁾ (€4.59 million) and North Macedonia (€4.17 million) were the top recipients in 2021, with Bosnia and Herzegovina ranking among TIKA's top 10 beneficiaries globally. The development projects encompass diverse areas, including support to the State Television MTV4 studio in Skopje, equipping and fitting out administrative and police directorate offices in Podgorica, providing speech and language therapy facilities at Angelus Day Care Centre in Domaljevac and installing 60 industrial sewing machines in a prison in Zenica.

One of the ways in which Türkiye seeks to integrate more deeply into the global economy and spur economic growth is through the aviation industry. National airlines can serve as instruments of soft power and public diplomacy, promoting a country's image and fostering positive international associations with the country⁽³⁾. Istanbul is geographically well-placed to take advantage of the markets to the east and the west, including in the Balkans. Turkish Airlines leads the way in providing an extensive network of direct flights to all Western Balkan capitals. The company offers the most frequent service to Belgrade (21

per week/3 per day), Podgorica (18 per week), Skopje (14 per week/2 per day), Sarajevo (14 per week), Pristina (11 per week), and Tivat (5 per week) (see map on Turkish Airlines on page 5). Pegasus Airlines, a privately-owned Turkish low-cost carrier, also operates weekly flights to all Western Balkan capitals; 11 flights to Tirana and Sarajevo, 8 to Pristina and Skopje, 7 to Podgorica and 4 to Belgrade.

For comparison, among European carriers, only Austrian Airlines operates direct flights to all Western Balkan capitals.

However, Türkiye's investment and development plans for the region might be derailed by soaring inflation and a weakening currency. The economic situation has been further strained by two devastating earthquakes that struck Türkiye in Febru-

ary 2023. Inflation has risen to almost 65 % and is expected to peak by mid-June 2024, adding pressure to Türkiye's already fragile macro-financial situation.

WALKING THE TIGHTROPE OF POLITICAL AND SECURITY CHOICES

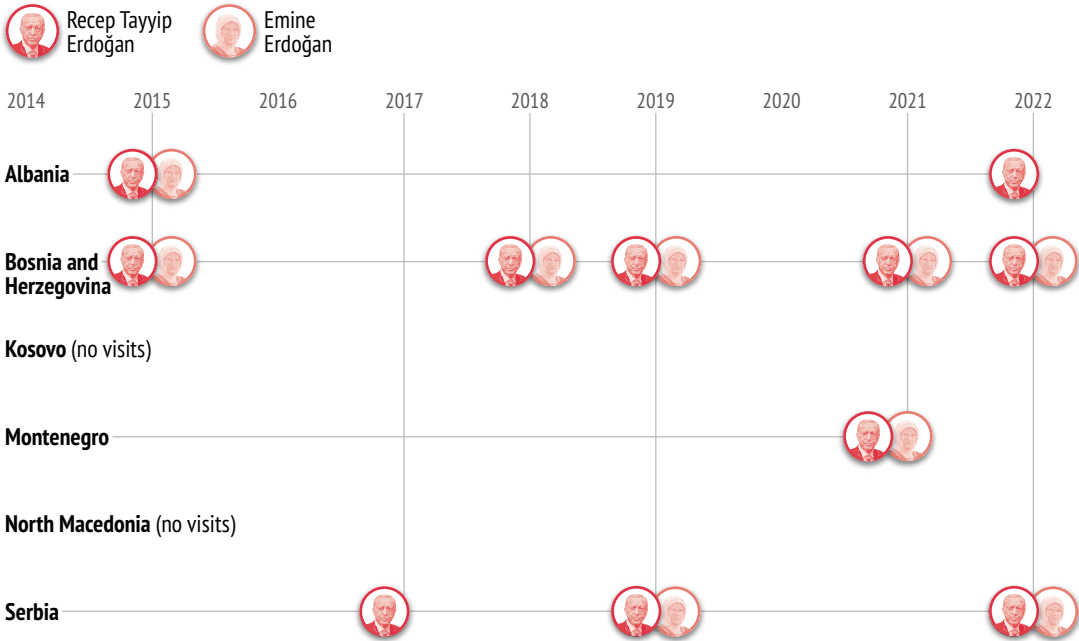
Türkiye maintains close bilateral relations with each Western Balkan country, catering to their specific needs and circumstances. Türkiye was the very first state to recognise North Macedonia by its constitutional name, one of the first to recognise Kosovo following its proclamation of independence, and it

(2) This designation is without prejudice to positions on status and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence. This applies throughout the text of this *Chaillot Paper*.

(3) See Kobierecki, M.M., 'Aviation diplomacy: A conceptual framework for analysing the relationship between aviation and international relations', *Place Branding and Public Diplomacy*, Vol.17, 2021, pp. 293-303 (<https://link.springer.com/article/10.1057/s41254-020-00172-5>).

Western Balkans delight(ed)

Visits by President Erdoğan and First Lady Emine Erdoğan to the region, 2014-2024



Data: Presidency of the Republic of Türkiye, 2024

continues to support Kosovo’s efforts to secure international recognition. In the 2000s Ankara leveraged its position as a NATO member, regional leader and EU partner to advocate for regional initiatives like the Southeast European Cooperation Process (SEEC), Regional Cooperation Council, Peace Implementation Council, and Southeast European Cooperative Initiative aimed at fostering greater stability. Over the past decade, Türkiye has been pursuing a more pragmatic and at times opportunistic foreign policy course, as President Erdoğan’s rule has taken an increasingly authoritarian turn, a style of governance which has found favour with several Western Balkan leaders.

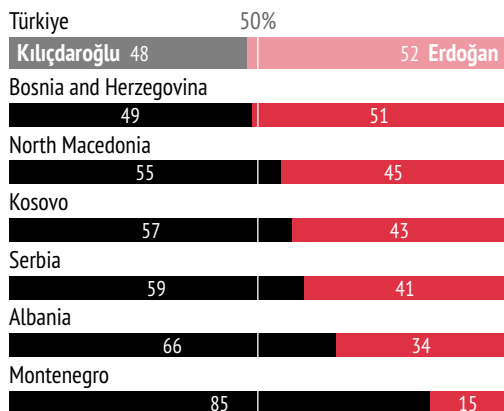
The rise of a more authoritarian form of governance under President Erdoğan has led to a growing tendency to project domestic problems onto the international stage, increasing

Türkiye’s vulnerability to external pressures. This was evident in the 2023 presidential elections, when the Turkish Balkan diaspora exhibited a significant shift in voting preferences, with a majority supporting Erdoğan’s opponent, Kemal Kilicdaroglu, compared to the 2018 presidential elections. The Turkish diaspora in the Western Balkans comprises two main groups: Turkish officials working for state institutions or on major state-led infrastructure projects, and individuals with family ties to the region who have left Türkiye due to increasing authoritarianism, such as students and businesspeople. Moreover, owing to the close connections of Balkan kin communities to Türkiye, the Turkish Balkan diaspora have been cognizant of the effects of President Erdoğan’s leadership, including the high inflation and high unemployment rates that have been witnessed since 2018⁽⁴⁾.

(4) For more see: World Bank, ‘The World Bank in Türkiye: Overview’, 2023 (<https://www.worldbank.org/en/country/turkey/overview>).

Kılıçdaroğlu outpaces Erdoğan in the Western Balkans

Turkish diaspora voting results in Türkiye's 2023 presidential election



Data: Al Jazeera, 'How did Turks living abroad vote in Turkey's run-off election?', 2023

Over time, Türkiye has increased its engagement in NATO, EU and UN peacekeeping missions and continued developing military cooperation with the Western Balkans⁽⁵⁾. In October 2023, Türkiye assumed command of the NATO-led KFOR peacekeeping force in Kosovo for one year for the first time. Following the Banjska attack in September 2023, the number of KFOR troops was increased to over 4 000 personnel. Despite this growing security cooperation, a potential obstacle exists in Türkiye's relationship with Serbia, due to frictions over Kosovo. President Erdoğan seems keen on developing closer ties with Belgrade, especially given his good personal relations with Serbian President Aleksandar Vučić. Immediately after Türkiye assumed the command of KFOR, the Turkish and Serbian ministers of defence met in Belgrade, where Serbia asked Türkiye for assurances that it would protect the Serbs in Kosovo. The matter of Kosovo seems to pose an obstacle to developing mutual relations and collaboration with Belgrade in the security and military domains. For instance, Serbia ultimately cancelled the planned purchase

of Turkish TB2 drones after Türkiye delivered a batch of five Bayraktar TB2 drones to Kosovo⁽⁶⁾. Nevertheless, Türkiye's position as an exporter of cutting-edge drones strengthens its diplomatic standing not only in the Balkans, but also with the EU and the United States. As far as the region is concerned, Türkiye will continue to seek to play an active role in security cooperation, fostering opportunities for collaboration without showing favouritism towards any specific country.

STATE-DRIVEN PUBLIC DIPLOMACY

Türkiye has established an extensive network of educational and cultural institutions, research institutes and language centres across the Western Balkans. The most prominent among these are TİKA, the Yunus Emre Institute and the Maarif Foundation which was established with the aim of taking control of overseas schools affiliated with the Gülen movement. There are also three Turkish state-funded universities, namely the International Balkan University (Skopje), University of New York (Tirana), and International University of Sarajevo. Several privately-funded Turkish universities also exist, such as International Vision University (Gostivar), International Burch University (Sarajevo), University of Epoka (Tirana) and Bedër University College (Tirana). Currently Kosovo, Montenegro and Serbia do not host any Turkish state or private university.

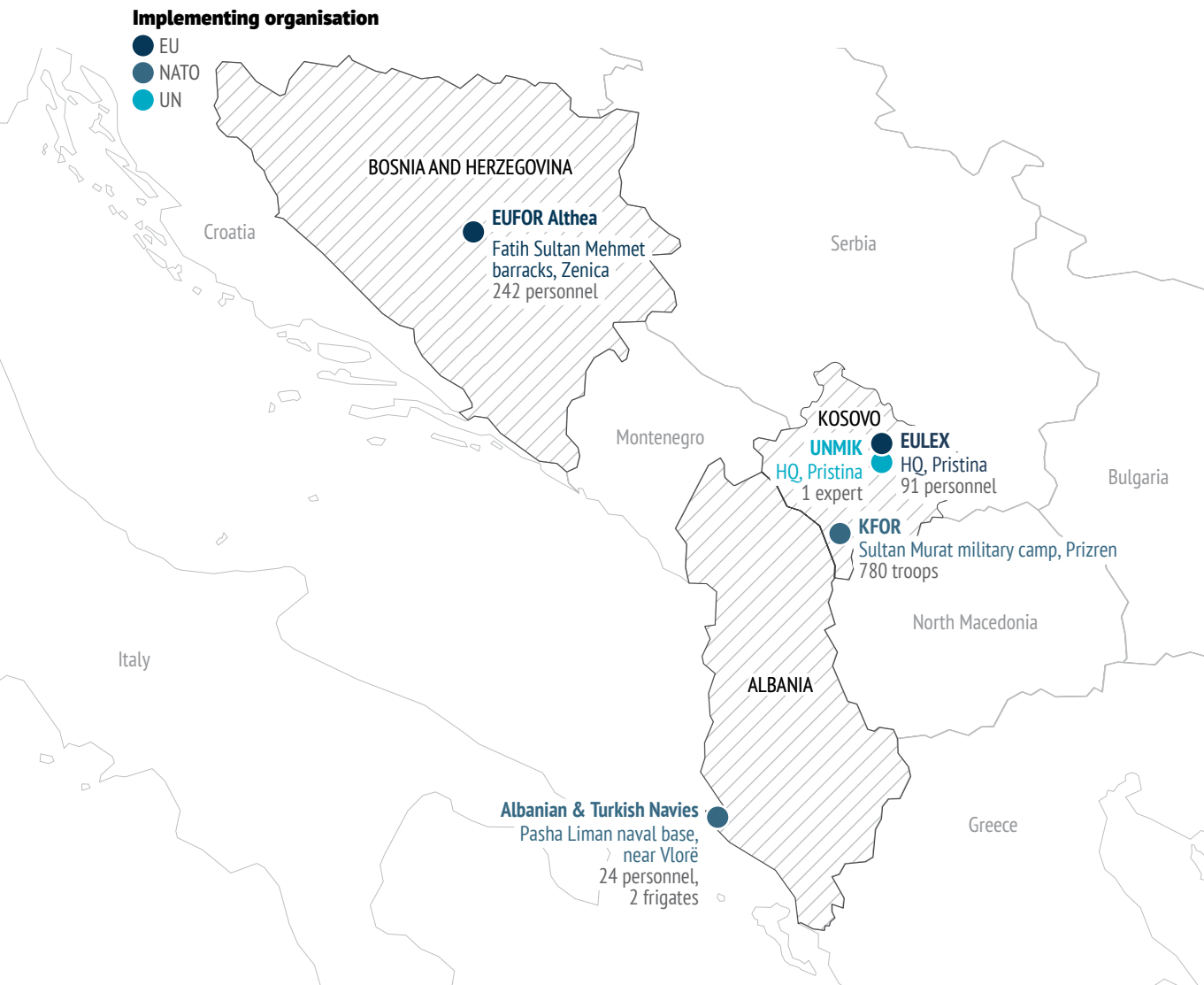
The Presidency for Turks Abroad and Related Communities (YTB) offers competitive short- and long-term scholarship programmes (*Türkiye Burslari*) for both undergraduate and postgraduate (master's and PhD) students. In 2022, 13 % of all scholarships granted

(5) Under the 1998 agreement, the Turkish navy has the right to use the Albanian naval base Pasha Liman (Vlorë).

(6) For more on drone diplomacy, see Vuksanovic, V. and Ejodus, F., 'Wings of change: Why armed drones are proliferating in Western Balkans', *Balkan Insight*, 17 July 2023 (<https://balkaninsight.com/2023/07/17/wings-of-change-why-armed-drones-are-proliferating-in-western-balkans/>).

Securing the perimeter

Türkiye's contributions to peace missions in the Western Balkans



Data: Anadolu Ajansi, 'Ambasadori turk viziton Bazën Detare Pashaliman', 2021; EEAS, EUFOR Althea, 2024; EEAS, EULEX Kosovo, 2024; NATO, KFOR, 2024; UN, UNMIK, 2024; European Commission, GISCO, 2024

were awarded to students from the Balkans, making it the fourth-largest beneficiary after Central Asia and South Caucasus (19 %), Sub-Saharan Africa (18 %), the Middle East (15 %) and South Asia (14 %) ⁽⁷⁾. This translates to around 560 scholarships offered to students from the Balkans in 2022, out of a total of 4 316 scholarships for long and short-term

programmes. In comparison in 2022, 5 115 higher education students from Serbia alone participated in the Erasmus+ EU programme for education, training, youth and sport ⁽⁸⁾.

In terms of media presence, Anadolu Agency is a key instrument of Turkish soft power in the region, with regional offices in Sarajevo and

(7) For more on Turkish scholarships, see Türkiye Bursları, 'About Türkiye Scholarships' (<https://www.turkiyeburslari.gov.tr/>).

(8) For more on the Erasmus + programme in Serbia, see European Union, 'Erasmus+ in Serbia in 2022', 2023 (<https://erasmus-plus.ec.europa.eu/sites/default/files/2023-11/Erasmus%2B%20Serbia%20in%202022%201.pdf>).

Skopje broadcasting in five languages (Albanian, Bosnian, Croatian, Macedonian, and Serbian). Since it was founded in 2015, the Skopje office has published more than 152 000 news articles, 57 000 photos and 33 000 videos in Albanian as well as 95 000 news articles, 31 000 photos and 21 000 videos in Macedonian⁽⁹⁾. Launched in 2022, Turkish Radio and Television Cooperation (TRT) Balkans broadcasts from Skopje, with a regional office in Sarajevo. TRT Balkans targets over 30 million viewers from the Balkans and the Balkan diaspora, with a wide range of content in multiple languages, including channels on YouTube, TikTok, X, Facebook and Instagram. This is the seventh international affiliate of the Ankara-based TRT network, which also includes TRT World, TRT Arabi, TRT Russian, TRT Deutsch, TRT Français and TRT Afrika.

The growing popularity of Turkish soap operas in the Balkans provides Ankara with another tool for exerting its soft power in the region. These dramas, which have taken over from Latin American telenovelas that were popular in the 1990s and early 2000s, resonate with Balkan audiences due to shared cultural and linguistic elements. Türkiye is a global leader in TV series exports to non-English-speaking countries, ranking third worldwide after the US and the UK, and reaching an audience of 750 million viewers across 152 countries. Turkish TV shows generate lucrative profits, with revenue per episode ranging from €280 000 to €650 000 in various countries⁽¹⁰⁾. The portrayal of traditional patriarchal family structures in Turkish soap operas finds a receptive audience in the Balkans where societies are transitioning between traditional and liberal (European) values.

Religion as a linchpin

Religious and cultural similarities have played a role in facilitating deeper political and economic ties between Türkiye and predominantly Muslim countries of the region. Religion has the capacity to exert profound changes on the official ideology and identity of states, thus transforming power dynamics both domestically and internationally⁽¹¹⁾. Türkiye's Directorate of Religious Affairs, the Diyanet, acts as a tool of transnational state diplomacy, promoting an officially sanctioned version of Islam, and lending legitimacy to the Islamic concept of Turkish national identity. The Diyanet maintains offices in all Western Balkan capitals with the exception of Belgrade.

The practice of faith-based diplomacy is a double-edged sword for President Erdoğan

who cautiously plays the 'Islamic card' in his dealings with the Western Balkan countries. For instance, Ankara's perceived neo-Ottoman tendencies, along with its support for Kosovo's independence, have strained relations with Serbia for decades. In 2017, while welcoming President Erdoğan on a state visit to Belgrade, President Vučić stated: 'This is not 1389, but 2017. Today, Serbia considers Türkiye as a friend', thus alluding to the Ottoman occupation in the 14th century. Ultimately, a combination of Turkish pragmatism and opportunism, along with shared affinities between the two leaders, have led to a *rapprochement* between Türkiye and Serbia in the past seven years. President Erdoğan's Islamic approach to foreign policy is not widely welcomed in Albania and Kosovo, where religion does not constitute

Türkiye's Directorate of Religious Affairs, the Diyanet, acts as a tool of transnational state diplomacy.

(9) See Aliju, D., 'Servis Anadolu na albanskom jeziku obiljezio devet godina rada' [Anadolu Agency in Albanian language marked nine years of work], Anadolu Agency, 2023 (<https://www.aa.com.tr/ba/balkan/servis-anadolu-na-albanskom-jeziku-obilje%C5%BEio-devet-godina-rada/3005384>).

(10) See 'Turkish TV series reach 750mln viewers', *Daily News*, 19 October 2023 (<https://www.hurriyetdailynews.com/turkish-tv-series-reach-750-mln-viewers-187143>).

(11) See Erdi Öztürk, A., *Religion, Identity and Power: Turkey and the Balkans in the Twenty-First Century*, Edinburgh University Press, 2021.

part of the state identity and where secularism facilitates identification with European values.

Last but not least, Türkiye faces competition from other regional players, namely Saudi Arabia and Iran, who propagate their own more radical interpretation of Islam. This is part of a wider struggle for global domination over the 'Islamic world'. Saudi Arabia promotes Wahhabism (an ultra-conservative and extremist religious movement within Sunni Islam) whose influence is growing in Bosnia and Herzegovina due to the presence of Wahhabist charity networks. In 2000, Saudi Arabia built what was at that time one of the biggest mosques in the Balkans, the King Fahd Mosque; in response, Türkiye commissioned The Great Mosque of Tirana (*Namazgah Mosque*), which is still under construction and will have the capacity to host 5 000 worshippers. Iran, on the other hand, cultivates close ties with the Faculty of Islamic Studies of the University of Sarajevo through the Ibn Sina Institute. These radical interpretations of Islam are not likely to gain traction however as moderate Islamic beliefs remain dominant in the region.

FOCUSING ON OPPORTUNITIES RATHER THAN DIVERGENCES

In the Western Balkans, Turkish foreign policy has undergone several significant transformations in the last two decades. Early in the 2000s, Türkiye took steps towards Europeanisation. This was followed by a period when the foreign policy doctrine of 'strategic depth', focused on expanding Türkiye's regional influence, came to the fore. Since 2016, Ankara has pursued a more assertive and inward-looking foreign policy. These shifts were largely driven by internal dynamics, such as the 2016 attempted *coup d'état* and the resignation of Ahmet Davutoglu as prime minister, as well as power-sharing arrangements within Türkiye.

Consequently, domestic politics have come to play a more central role in shaping Türkiye's foreign policy.

Yet, amidst these transformations, one constant remains: Türkiye's pivotal role as a key partner for the EU in pursuing its strategic interests in the region. This stems from Ankara's unwavering support for Euro-Atlantic integration and regional cooperation, Türkiye skilfully leverages its role as a regional power broker, using the tools in its diplomatic arsenal to address the specific circumstances of each Western Balkan country.

The future of EU-Türkiye cooperation in the Western Balkans hinges on a delicate balancing act. Both sides must capitalise on Türkiye's influence in the region to advance shared goals such as Euro-Atlantic integration, while acknowledging existing disagreements. At the same time Türkiye needs to demonstrate sustained commitment in other domains that extend beyond Euro-Atlantic integration and regional cooperation. Ultimately, the path forward depends on broader geopolitical developments and the overall state of Türkiye's relations with the West, underscoring the important role of diplomacy within the intricate political landscape of the Western Balkans.

CHAPTER 2

TÜRKIYE IN THE SOUTH CAUCASUS

A hesitant power

by
ONDŘEJ DITRYCH

INTRODUCTION

The most important constant of Türkiye's engagement with the South Caucasus remains its close relationship with Azerbaijan. Rooted in shared language and ethnic kinship, this close bond is embodied in the concept of 'one nation, two states' (*Bir millət, iki dövlət*), and exemplified above all by Ankara's staunch support to Azerbaijan in the latter country's protracted conflict with Armenia. However, in recent years Türkiye has also demonstrated a renewed interest in expanding its geopolitical ambitions in the region as a whole.

For centuries the South Caucasus served as a battleground for great power rivalry, with Türkiye, Persia and later Imperial Russia vying for influence. After the region fell to the Bolsheviks following the local conflicts that erupted at the end of World War I, it remained off-limits for decades under Soviet rule. But with the demise of the Soviet Union in the

early 1990s, the South Caucasus was cast by Türkiye as a part of the Turkic World and a bridge to Central Asia⁽¹⁾. As the USSR fell apart, in December 1991 Ankara swiftly recognised the independence of all three former Soviet republics of Azerbaijan, Armenia and Georgia. It actively established diplomatic ties, dispatched a large number of delegations to the region, and opened embassies (except in Armenia), alongside direct air connections and satellite broadcast links. Türkiye thus aimed to establish a network of relationships and influence, also with a view to countering Iranian ambitions in the South Caucasus. However, Russia remained the dominant external power, shaping – and constraining – Türkiye's ambitions in the region, including the level of support it could lend to Azerbaijan⁽²⁾.

The recognition of Russia as a major regional power and the need to carefully manage Ankara's and Moscow's competing interests continues to shape Türkiye's engagement in the

(1) This was initially embodied in President Turgut Özal's 'Türkistan' plan to expand Türkiye's influence in the republics of the South Caucasus and Central Asia as part of his project to pursue a more active foreign policy.

(2) Türkiye sealed off the border with Armenia when the latter's troops occupied the Azerbaijani region of Kalbajar in 1993, but shied away from direct military intervention. President Turgut Özal, who otherwise spoke of Azerbaijanis as 'brothers', was not above instrumentalising the Sunni/Shi'a religious divide when taking a calculated distance in such moments.

South Caucasus to this day. But in recent years Ankara has also opportunistically exploited Russia’s declining influence in the region to expand its own footprint. The Second Karabakh War (2020) marked a turning point, with Türkiye’s more direct engagement on the side of Azerbaijan. However, as this chapter shows, Türkiye so far remains a hesitant power in the pursuit of its regional interests. Several factors constrain its ambitions: deference to Russia’s concerns; prioritising the interests of one ally (Azerbaijan), over its own in the still unresolved conflict with Armenia; domestic economic challenges; and the need to navigate a complex local political landscape in the region.

THE DREAM OF THE MIDDLE CORRIDOR

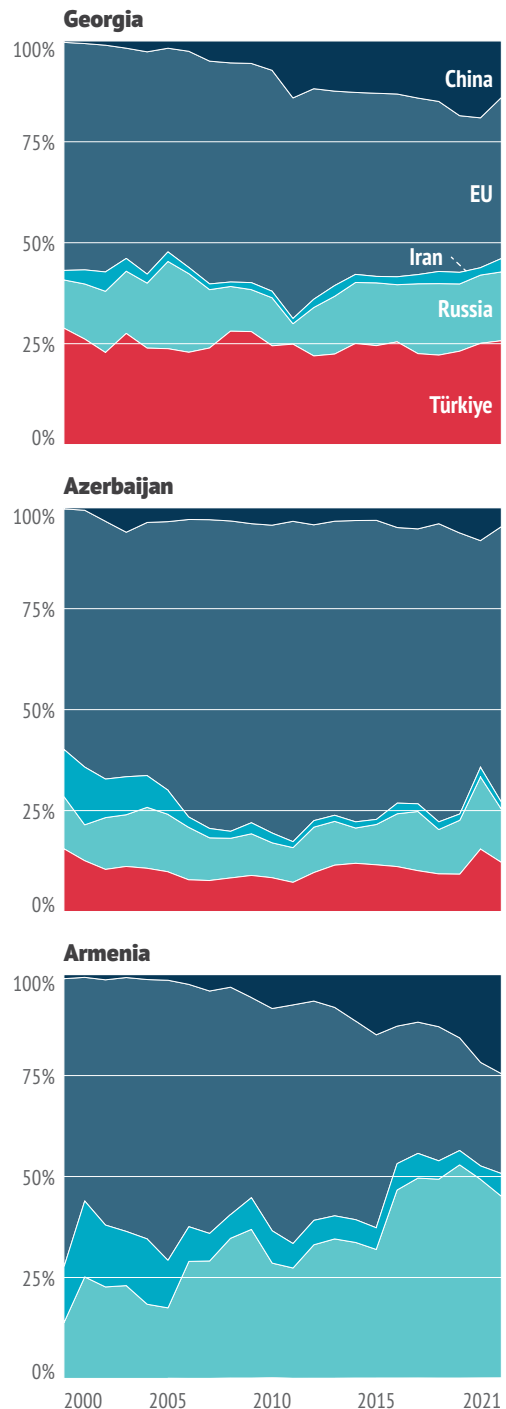
Traditional economic indicators like trade volume and foreign direct investment (FDI) tend to suggest a modest Turkish presence in the region compared to powers like Russia or China (see diagram opposite). Notably, Türkiye’s FDI in Azerbaijan is significantly lower than Azerbaijan’s investment in Türkiye⁽³⁾, while a declining investment trend may be observed in Georgia⁽⁴⁾. However, trade figures do not capture the full picture. Ankara’s regional ambitions and strategic vision are most clearly articulated in the Middle Corridor project. This builds upon existing east-west infrastructure linking Türkiye to the Caspian Sea basin through Georgia and Azerbaijan and includes

(3) For more economic data see: Ministry of Foreign Affairs, Republic of Türkiye, ‘Economic relations between Türkiye and Azerbaijan’ (<https://www.mfa.gov.tr/economic-relations-between-turkey-and-azerbaijan.en.mfa>).

(4) Türkiye’s FDI in Georgia dropped from €197.53 million in 2017 to €101.14 million in 2022, despite earlier more substantial investments (incentivised by the Saakashvili government in the 2000s as relations with Russia soured after the Rose Revolution) in building projects and hydropower, regionally specific development in Batumi/Ajara, and (re)construction of airports in Tbilisi and Batumi now run by a local daughter company of Türkiye’s TAC Airports Holding. See National Statistics Office of Georgia (<https://www.geostat.ge/en>).

Trading partners in perspective

Relative share of selected trading partners, 2000–2021, %



Data: UN Comtrade, 2024

the Baku–Tbilisi–Ceyhan (BTC) oil pipeline and the natural gas pipeline from Baku to Erzurum (BTE). The more recently constructed Trans–Anatolian (TANAP) and Trans–Adriatic (TAP) pipelines, which are part of the Southern Gas Corridor, have further enhanced the importance of this route. The BTC and BTE pipelines, which came into operation in the mid-2000s, broke Russia's monopoly on the transport of Caspian oil and gas.

This resolved not only capacity (including that of the Bosphorus and Dardanelles Straits) and fees issues but reduced the overall dependence of both Azerbaijan and Georgia on Russia as a transit country⁽⁵⁾. Further energy infrastructure development is underway. There are plans to expand TANAP's capacity, for example, a move which would bolster Türkiye's ambitions to become a 'gas hub' since it would allow increased volumes of Azerbaijani but also possibly Russian gas to be channelled to other markets. While the oil and gas pipelines establishing a link to the Caspian Sea in the 2000s aimed to diversify supply routes, the parallel construction of the Blue Stream gas pipeline on the Black Sea seabed to Russia created an additional conduit for Russian gas resold to other European markets.

But it is above all through the Middle Corridor – a 'middle' alternative to the Northern (land) route through Russia and the Southern (maritime) route connecting Eurasia's two seaboards – that Türkiye articulates its geopolitical vision of the region, and its ambition to project influence further east. The Middle Corridor carries the promise of making the

land route from China to Europe shorter by 3 000 km and diversifying trade routes to other countries along the way. However, several obstacles stand in the way of this potential being fully realised at present.

First, the Middle Corridor is likely to soon find itself competing with the Northern Sea route due to melting polar ice. While the Arctic route

presents geopolitical challenges of its own, it offers advantage in terms of costs and speed. In contrast, the Middle Corridor is currently hampered by inefficiencies that triple the travel time for transporting cargo from China to Europe compared to the Russian route⁽⁶⁾. The World Bank estimates that the Middle Corridor has the potential to triple transport volumes and halve travel time by 2030,

but only if these inefficiencies are addressed. To this end, Türkiye, along with Georgia, Azerbaijan and Kazakhstan, signed a joint roadmap agreement in 2022. But even in this optimistic scenario, estimates suggest that 60 % of the trade facilitated by the Middle Corridor would remain regional rather than transcontinental, limiting its ability to compete with existing or future alternatives⁽⁷⁾.

Second, the extent to which Türkiye will become a central hub for the Middle Corridor traffic flows remains to be seen. The deteriorating security situation in the Black Sea threatens freedom of navigation and presents heightened risks to infrastructure security. This underscores the importance of the Middle Corridor as a land bridge between Europe and the South Caucasus (and beyond). But even

Ankara's regional ambitions and strategic vision are most clearly articulated in the Middle Corridor project.

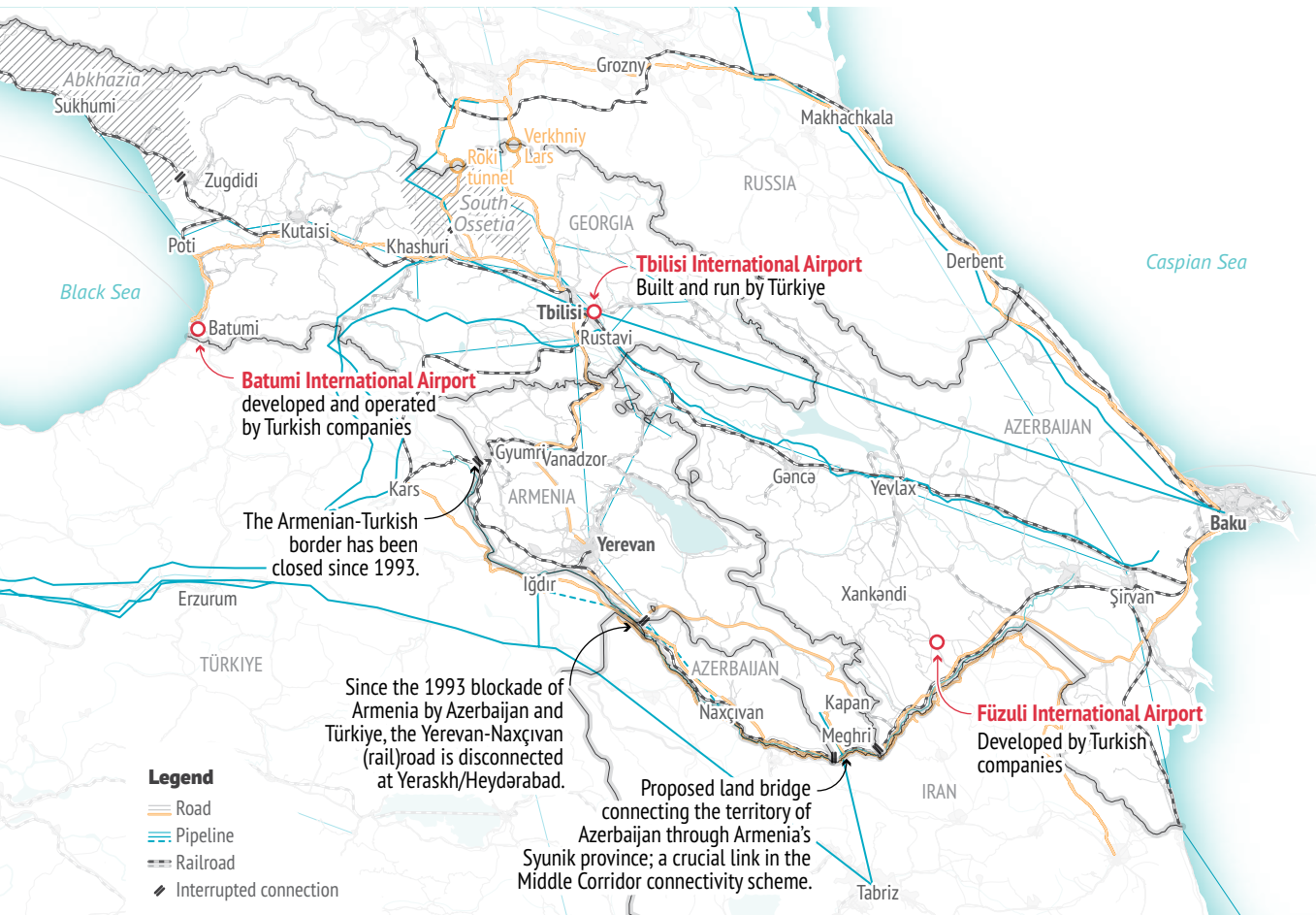
(5) While these projects have also reduced Türkiye's dependence, for now Russia remains its largest source of both crude oil and petroleum products, as well as of natural gas (39 % in 2022, compared to 15.9 % delivered from Azerbaijan). See US Energy Information Administration, 'Country Analysis Brief: Türkiye', July 2023 (https://www.eia.gov/international/content/analysis/countries_long/Turkiye/turkiye.pdf); see also Loskot–Strachota, A. and Michalski, A., 'Turkey's dream of a hub: Ankara's wartime gas policy', *OSW Commentary*, 3 October 2023 (<https://www.osw.waw.pl/en/publikacje/osw-commentary/2023-03-10/turkeys-dream-a-hub-ankaras-wartime-gas-policy>).

(6) Container traffic along the corridor increased by 33 % in 2022 because of Russia's war on Ukraine but then fell back again due to operational inefficiencies. See The World Bank, *Middle Trade and Transport Corridor: Policies and investments to triple freight volumes and halve travel time by 2030*, Washington D.C., 2023 (<https://www.worldbank.org/en/region/eca/publication/middle-trade-and-transport-corridor>).

(7) Ibid.

Weaving the Caucasus-Türkiye tapestry

Key infrastructure and Turkish interests in the South Caucasus



Data: EUISS own collection of data compiled from multiple sources, 2024; Natural Earth, 2024; European Commission, GISCO, 2024; Global Energy Monitor, 2024

under the current adverse circumstances, the bulk of the cargo continues to be shipped by sea due to inadequate land infrastructure – and the currently foreseen infrastructure projects in Anatolia do not prioritise connections to the Caucasus ⁽⁸⁾.

Third, the efficiency of the Middle Corridor transport flows could be significantly improved by opening transportation links between Türkiye, Armenia and Azerbaijan. This would allow for freight traffic to be rerouted towards the southern lowlands of the Caucasus. A key element of this scheme is the development of a modern road and a restored

railway connection along the Araxes River in Armenia's Syunik province – referred to by Türkiye and Azerbaijan as the 'Zangezur Corridor' – that would link Azerbaijan proper with its exclave of Naxçıvan. A comprehensive peace agreement following Azerbaijan's take-over of Nagorno Karabakh in 2023 that would lead to normalised relations between Azerbaijan and Armenia but also Türkiye and Armenia would clearly be in Türkiye's interest. This would include reopening closed borders. However, Ankara has been reluctant to exert any pressure on Azerbaijan to remove a condition – enshrined in the now defunct 2020 ceasefire agreement – granting Russia's border

(8) Investment Office, Presidency of the Republic of Türkiye, *Investing in Infrastructure and PPP Projects in Türkiye*, July 2023 (<https://www.invest.gov.tr/en/library/publications/lists/investpublications/infrastructure-industry.pdf>).

guards a special role in 'control over transport communication' in Syunik. This hesitancy reflects Türkiye's continuing deference to Russia's interests in the region, but also the complex nature of Ankara's relationship with Baku. Türkiye avoids confronting Azerbaijan over this concession to Russia which is likely part of a broader understanding that may also include plans to rebuild the Caspian railway. This railway would create a north/south regional transport axis connecting Russia and Iran through Azerbaijan –potentially countering Türkiye's own strategic interests.

Türkiye's cautious approach to the Zangezur Corridor is a clear example of its hesitant pursuit of its regional ambitions. However, the increased trade flows between Türkiye and Russia via the South Caucasus since Moscow's full-scale invasion of Ukraine demonstrate how the two countries can cooperate for their mutual benefit. Exports of sensitive materials (chips, communication equipment or telescope sights used in drones, cruise missiles and helicopters) have been a part of these 'parallel imports' – recorded in surging exports to Azerbaijan and Georgia, but not a matching increase in declared imports by those countries, suggesting that these goods are being re-exported to Russia⁽⁹⁾. Facing pressure from the G7 countries, Ankara has reportedly moved to curb the transit of sensitive materials⁽¹⁰⁾. However, its overall trade with Russia has increased by 93 % since the invasion⁽¹¹⁾. Rather than a means of projecting geoeconomic power, the increasing trade volumes in the direction of the South Caucasus – with the region being used as a transit station to reach Russia's markets – have provided Türkiye with an

opportunistic solution to its own international economic woes.

POLITICAL AND MILITARY RELATIONS: MANAGING COMPLEXITY

In the pursuit of its more ambitious policy *vis-à-vis* the region, Türkiye has had to not only manage its multifaceted relationship with Russia but also to navigate a complex geopolitical landscape involving a variety of states. Ankara has largely managed to do so without becoming embroiled in any major conflicts, but this complexity imposes further constraints upon its actions alongside the need to avoid a direct confrontation with Moscow.

Türkiye's most challenging relationship is with **Armenia**. This stems from Türkiye's support for Azerbaijan but also conflicting modern nationalist narratives and the legacy of the Armenian genocide. The relationship has not always been so strained, however – Türkiye initially recognised Armenia's independence and only declined to establish diplomatic relations when Armenia refused to grant formal recognition of existing state boundaries⁽¹²⁾ before the Nagorno Karabakh war, and in particular due to Armenia's occupation of the Kalbajar region in 1993, which led it to seal the border. Over the next two decades, the relationship has featured

(9) 'Turkey's exports of military-linked goods to Russia soar', *Financial Times*, 27 November 2023 (<https://www.ft.com/content/1cef6628-32eb-49c9-a7f1-2aef9bce4239>).

(10) *Ibid.*

(11) Lipsky, J. and Graham, N., 'China is trading more with Russia – but so are many U.S. allies and partners', *New Atlanticist*, 30 May 2023 (<https://www.atlanticcouncil.org/blogs/new-atlanticist/china-is-trading-more-with-russia-but-so-are-many-us-allies-and-partners/>).

(12) Aydın, M., 'Turkish policy toward the Caucasus: Some general considerations', in Balci, B. and Motika, R. (eds.), *Religion et politique dans le Caucase post-soviétique*, Institut français d'études anatoliennes, Istanbul, 2007.

a number of episodes of (partial) *rapprochement*⁽¹³⁾. The latest initiative in the normalisation process was launched through the dialogue of the special envoys appointed in 2021. Armenia's prime minister Pashinyan was eager to limit his country's dependence on Russia and to seek new allies after the catastrophic outcome of the Second Karabakh War. He and Erdoğan met at the inaugural meeting of the European Political Community in Prague in 2022 and have held several phone calls since. After the disastrous earthquake that struck Türkiye in 2023, Armenia opened the border for humanitarian aid. Later the same year, Pashinyan attended Erdoğan's presidential inauguration. Despite these steps, however, Türkiye's relationship with Armenia remains hostage to its close partnership with Azerbaijan.

The partnership between Türkiye and Azerbaijan dates back three decades but has grown closer in recent years. The 2021 Shusha Declaration, signed in the recaptured historically important town in Nagorno Karabakh, formally upgraded an earlier strategic partnership and mutual assistance agreement between the two countries. The previous year, following his re-election, President Erdoğan's first foreign visit was to Baku rather than to the 'Turkish Republic of Northern Cyprus', as was customary. Even more importantly, that same year Türkiye's TB2 drones played a decisive

Türkiye's relationship with Armenia remains hostage to its close partnership with Azerbaijan.

role in establishing Azerbaijan's air superiority in the Second Karabakh War – as well as in subsequent minor conflicts – inflicting major damage on Armenia and the Nagorno Karabakh Republic's armoured vehicles, air defences and heavy artillery. Military training provided by Türkiye also played a significant role in addressing the gap in capabilities between Azerbaijan and Armenia inherited from the Soviet era. Joint military exercises, including those conducted in areas close to the conflict zone, served as a clear signal of Türkiye's support for Azerbaijan. But the intensity of Türkiye's support to Baku's campaign to revisit the regional geopolitical *status quo* of late has been a real game-changer, while also confirming Türkiye's ascent as a drone power despite

being otherwise a minor global arms producer⁽¹⁴⁾. The ceasefire that brought the Second Karabakh War to an end in November 2020 was eventually brokered by Moscow. However, following the war Türkiye established its military presence in the region for the first time through a joint monitoring centre with Russia in the Ağdam district. It also stood with Azerbaijan during its subsequent actions against Armenia including territorial incursions, the blockade of the Lachin corridor (connecting Nagorno Karabakh to Armenia) and the eventual takeover of Nagorno Karabakh and the remaining occupied territories in Azerbaijan in September 2023⁽¹⁵⁾.

(13) The two countries came closest to normalising their relations when the Zürich Protocols were signed in 2009, whereby Armenia recognised the existing border and a commission on other, including historical issues, was to be established. But Armenia suspended the ratification and later formally rejected the protocols (2018).

(14) Türkiye was the twelfth global arms exporter in 2018–2022 with 1.1 % share of the market according to SIPRI. See Wezeman, P., Gadon, J. and Wezeman, S., 'Trends in International Arms Transfers, 2023', SIPRI, Stockholm, 2024. In addition to its fleet of drones, Türkiye also deployed between 1 000 and 2 000 Syrians from Idlib through a private military company (PMC) to fight in the war – a tactic previously used in Libya. See Butler, E., 'The Syrian mercenaries used as "cannon fodder" in Nagorno-Karabakh', BBC News, 10 December 2020 (<https://www.bbc.com/news/stories-55238803>); and Office of the UN High Commissioner for Human Rights (OHCHR), 'Mercenaries in and around the Nagorno-Karabakh conflict zone must be withdrawn – UN experts', 11 November 2020 (<https://www.ohchr.org/en/press-releases/2020/11/mercenaries-and-around-nagorno-karabakh-conflict-zone-must-be-withdrawn-un?LangID=E&NewsID=26494>).

(15) For example, when a UNSC emergency session was called in relation to the September 2023 offensive in Nagorno Karabakh that eventually resulted in the takeover of the region and exodus of almost its entire population, Türkiye stated during the debate that Azerbaijan had no choice but to take measures it deemed necessary, reiterating the narrative that Baku had deployed a 'counterterrorist' operation. See United Nations, 'Latest clash between Armenia, Azerbaijan undermines prospects of peace, speakers warn Security Council, calling for genuine dialogue to settle outstanding issues', Press Release, 21 September 2023 (<https://press.un.org/en/2023/sc15418.doc.htm>).

But Azerbaijan also maintains a parallel relationship with Russia – sometimes, as in the case of unblocking the Zangezur Corridor, contravening Türkiye's interests. Baku also cultivates ties with Israel, to which it exports oil and from which it buys modern weapons technology: in addition to TB2s, Azerbaijan deployed Israeli missiles and loitering munitions in its recent offensives⁽¹⁶⁾. Azerbaijan's leadership maintains networks of influence in Türkiye too, including through media ownership. These factors, combined with business ties between the families of the countries' two leaders⁽¹⁷⁾, likely explain why Türkiye has not pressurised Azerbaijan more to make concessions on issues related to Ankara's connectivity interests in the region.

Georgia has featured prominently in Ankara's connectivity projects, acting as a vital transit country. Türkiye has been providing training and material support to Georgia's defence forces since the 1990s. It helped modernise the Vaziani military base after Russia's forces vacated it in 2001, and assisted in repairing the Marneuli military airport after it was damaged by Russia in 2008. It has also participated in trilateral military exercises with Georgia and Azerbaijan. In 2003, following the Rose Revolution, Türkiye intervened in the Autonomous Republic of Adjara to ensure Tbilisi's control over the local government there. Relations have been complicated, however, by ties that Türkiye has maintained with the separatist region of Abkhazia and have been negatively impacted by Ankara's recognition of Russia's interests and its anxiety to avoid conflict with Moscow.

TÜRKIYE'S SOFT POWER IN THE REGION: IMAGE-BUILDING AND ITS OBSTACLES

Türkiye has developed a significant portfolio of cultural, development and educational programmes in the region since the 1990s. Yet its efforts to exert soft power have faced both internal and regionally specific obstacles. As a result, the exercise of soft power serves as a complement to Ankara's pursuit of its regional ambitions but does not remove the economic or political constraints on Türkiye's regional position or open major new avenues of influence⁽¹⁸⁾.

The conflict with Armenia and the lingering trauma of the 1915 genocide make it nearly impossible for Türkiye to establish a soft power presence in Armenia. In contrast, Türkiye has made a concerted effort to improve its image in Georgia and Azerbaijan through development and cultural initiatives since the demise of the USSR. TİKA's activities in both countries, launched immediately after the agency was founded in 1992, are indispensable to those efforts. In Azerbaijan, TİKA has implemented over 1 200 projects focused on training professionals in healthcare, law, the security sector and tourism⁽¹⁹⁾. In Georgia, over 650 projects initiated since 1992 have addressed public administration, education, healthcare, sanitation, culture and transportation needs. TİKA funded reconstruction activities after the 2008 Russia-Georgia War,

(16) Debre, I., 'Israeli arms, drones quietly helped Azerbaijan retake Nagorno-Karabakh', *C4ISRNET*, 5 October 2023 (<https://www.c4isrnet.com/battlefield-tech/2023/10/05/israeli-arms-drones-quietly-helped-azerbaijan-retake-nagorno-karabakh/>).

(17) Natiqqizi, U., "'Brotherly' Azerbaijan and Turkey build lucrative Karabakh business ties', *Eurasianet*, 24 October 2022 (<https://eurasianet.org/brotherly-azerbaijan-and-turkey-build-lucrative-karabakh-business-ties>).

(18) See also Benli Altunisik, M., 'Turkey's soft power in a comparative context: The South Caucasus and the Middle East', in Kamrava, M. (ed.), *The Great Game in West Asia*, Oxford University Press, Oxford, 2017.

(19) Turkish Cooperation and Coordination Agency, 'TİKA has implemented more than 1 200 projects in Azerbaijan', 25 August 2021 (https://tika.gov.tr/en/detail-tika_has_implemented_more_than_1200_projects_in_azerbaijan/).

including homes in Gori, thereby boosting Türkiye's profile as a humanitarian actor. Since the Second Karabakh War, both TİKA and Turkish construction companies – with the support of the state and ties to Erdoğan's family – have participated in reconstruction efforts in the recaptured territories in and around Nagorno Karabakh. The projects include building roads, airports (like the new Fuzuli airport), restoring hydropower plants in Kalbajar and Lachin, developing mining operations in Gashgachay, Elbaydash and Agdudzag and even a 'smart agriculture campus' in Zangilan. According to Erdoğan, contracts worth more than €2.78 billion have been signed for the development of these territories⁽²⁰⁾. Türkiye's goals here are to kick-start its struggling construction industry and to project soft power by facilitating the return of Azerbaijanis to their 'ancestral lands'.

Turkish television programmes (including sports broadcasts) are also extremely popular in Azerbaijan⁽²¹⁾. Some TV series, such as *Diriliş: Ertuğrul*, which depicts the life of the father of Osman I, the founder of the Ottoman Empire, have been linked to political messaging by the Justice and Development Party (AKP)⁽²²⁾. In both Azerbaijan and Georgia, Turkish entities have moreover been involved in building and renovating mosques and running schools and universities. These activities have however been impacted by the Turkish government's

The conflict with the Gülenist Hizmet movement has limited the reach of Türkiye's cultural influence.

conflict with the Gülenist *Hizmet* movement – which previously had a larger presence in education and religious institutions in these countries than Türkiye's official religious authority, the Diyanet. The Maarif Foundation was established in both countries, but while schools affiliated with the Gülenist movement were taken over in Azerbaijan, in Georgia they continued to be operated by the Çağlar foundation, albeit under increased government pressure⁽²³⁾.

This rift has limited the reach of Türkiye's cultural influence. The situation is further complicated by religious differences in the region. While Georgia's Muslim minority population is now concentrated in Adjara, Azerbaijan is predominantly Shi'a Muslim (around 65 %)⁽²⁴⁾ due to its historical ties to Persia, unlike the Western Black Sea regions that were once ruled by the Ottoman Empire. Moreover, the secular regime in Baku harbours a general suspicion of religious activities – fearing in particular Iran's covert influence, although it had also scrutinised the activities of the Gülenists

even before their fallout with the Turkish government. In Georgia, moreover, social anxieties exist concerning the revival of Ottoman heritage in Adjara (a former Ottoman territory). One point of contention concerned the rebuilding of Aziz Mosque in Batumi⁽²⁵⁾. Some Georgians even worry about possible pressure to redraw the state borders. These anxieties

(20) Azernews, 'President Ilham Aliziev attending extraordinary summit of Organization of Turkic States in Ankara', 16 March 2023 (<https://www.azernews.az/nation/207582.html>).

(21) Seyidov, I., '“As quiet as a mouse”: Media use in Azerbaijan', *Communications*, Vol. 45, No 1, 2020, pp. 893–911.

(22) Carney, J., 'Resurrecting a spectacular hero: Diriliş Ertuğrul, necropolitics, and popular culture in Turkey', *Review of Middle East Studies*, Vol. 52, No 1, 2018, pp. 93–114.

(23) Since 2017, at which time Çağlar ran a university, a college and 6 schools in Georgia, the government has revoked the licences of several of these educational institutions. In 2023, the International Black Sea University (IBSU) in Batumi, previously prohibited from taking new students for a period of time, was acquired by new owners.

(24) See US Department of State, *2022 Report on International Religious Freedom: Azerbaijan, 2022* (<https://www.state.gov/reports/2022-report-on-international-religious-freedom/azerbaijan/>).

(25) Menabde, G., 'Restoration of Aziz Mosque in Adjara reignites debates over Ottoman legacy in Georgia', Jamestown Foundation, 8 February 2016 (<https://jamestown.org/program/restoration-of-aziz-mosque-in-adjara-reignites-debate-over-ottoman-legacy-in-georgia/>).

have been fuelled by Russia's foreign interference and manipulation efforts⁽²⁶⁾, ironically so since Türkiye has not played the ethnopolitical card to stoke tensions and exert influence in post-Soviet Georgia – unlike Russia itself. On the other hand, Georgia's ruling party's use of culture war rhetoric in public debates, pitting proponents of progressive Western values against partisans of a 'traditional' social order, has aligned it more closely with the worldview of Türkiye's government.

CONCLUSION: THE RISKS OF HESITANCY

The EU is actively seeking to re-engage with Türkiye, aiming to defuse tensions and identify areas of mutually beneficial cooperation⁽²⁷⁾.

The South Caucasus is a region with significant opportunities for aligning interests. A successful outcome could create favourable conditions for regional security and prosperity. This could be achieved through removing existing barriers to connectivity, thereby rectifying the historic irony of new walls emerging almost immediately after the USSR collapsed in the 1990s.

To bring about this positive scenario and ensure benefits for local societies alongside the EU and Türkiye, the EU should urge Ankara to support a comprehensive peace agreement between Azerbaijan and Armenia. Such an agreement would normalise relations, open the currently closed borders between Armenia on one hand and Azerbaijan and Türkiye on the other, and facilitate progress on regional

connectivity projects. The EU could play a crucial role in these projects by providing international guarantees, loans and technical expertise. What is essential is that the projects benefit all local actors and are designed to support, rather than restrict, the sovereign choices of each country.

To achieve this positive outcome, Türkiye needs to overcome some of the obstacles to the exercise of its interests in the South Caucasus that this chapter has discussed in detail – from rolling back Russia's influence to better balancing its interests with those of Azerbaijan regarding the conflict with Armenia. These obstacles, combined with internal weaknesses, have led Türkiye to act as an 'entrepreneurial' yet hesitant power in the region. There are risks inherent in this cautious approach, however. Most concerning is the potential for a renewed escalation of the still unresolved conflict between Azerbaijan and Armenia. This

Türkiye acts as an 'entrepreneurial' yet hesitant power in the region.

could be ignited by incidents on the volatile border and escalate into Azerbaijani military action in Syunik supported by Moscow. Russia's aim would be to force Armenia, which is now gravitating towards the West, back into its sphere of influence and definitively ensure its own

regional dominance. Such a scenario would derail Türkiye's current ambitions *vis-à-vis* the region. Instead, Russia, having thrived on fostering instability in the region for the past three decades, would emerge empowered. This would be a major setback for the EU, Türkiye, and the region's hopes for a stable and prosperous future.

(26) See Seskuria, N., 'Targeting Turkish-Georgian relations: Russian disinformation is taking a local turn, *RUSI Commentary*, 20 May 2021 (<https://rusi.org/explore-our-research/publications/commentary/targeting-turkish-georgian-relations-russian-disinformation-taking-local-turn>).

(27) European Commission, Joint Communication to the European Council, 'State of play of EU-Türkiye political, economic and trade relations', JOIN(2023), 29 November 2023 (<https://neighbourhood-enlargement.ec.europa.eu/system/files/2023-11/Joint%20Communication%20to%20the%20European%20Council%20-%20State%20of%20play%20of%20EU-Turkiye%20political%20and%20trade%20relations.pdf>).

CHAPTER 3

TÜRKIYE AND THE MENA REGION

Evolving dynamics and strategic choices

by
DALIA GHANEM AND PINAR AKPINAR

INTRODUCTION

From Turkish soap operas captivating audiences across the Arab world to its cutting-edge TB2 drones deployed on battlefields, Türkiye's presence in the Middle East, North Africa and the Gulf region has grown. Erdoğan's recent vocal support for the Palestinians and his condemnation⁽¹⁾ of Israel, along with Ankara's ongoing humanitarian aid to the ever-growing number of refugees from Syria, Afghanistan and other countries in the region, have resonated with Arab public opinion even more. These are just a few signs of Türkiye's growing footprint and ambitions in the region. The significant strides made in diplomacy, economic influence, military technology and cultural attraction in the past few years paint a picture that warrants closer examination.

A closer look reveals a more complex and nuanced reality: Türkiye has to contend with an intricate political calculus as it grapples with

national economic woes, heightened security concerns and a shifting global order. The economic shockwaves from the Covid-19 pandemic, the ripple effects of the war in Ukraine, and a deteriorating domestic economy have recently led Türkiye to seek closer collaboration with its southern neighbours. Ankara views the oil-rich Gulf states as a lifeline to revive Türkiye's sluggish economy, thereby shoring up President Erdoğan's hold on power after his narrow re-election victory in 2023 and his defeat in the local elections in 2024⁽²⁾. Recent currency swaps and deposits from the Gulf underscore this strategic courtship. This economic imperative reflects a broader regional trend. Sensing America's waning commitment to the region and chafing under the EU's shadow, Gulf and North African states have embarked on a quest for regional solutions and partnerships.

Engaging with the MENA/Gulf region allows Ankara to diversify its partnerships, reduce its isolation, and assert its strategic autonomy, distancing itself from the West's orbit

(1) "Turkey's Erdogan says Israel's Netanyahu "will be tried as war criminal"', Reuters, 4 December 2023 (<https://www.reuters.com/world/middle-east/turkeys-erdogan-says-israels-netanyahu-will-be-tried-war-criminal-2023-12-04/>).

(2) Akpinar, P. and Umar, S., 'Chasing votes in the Gulf: Modi and Erdogan turn to campaigning abroad', *International Policy Digest*, 26 March 2024 (<https://intpolicydigest.org/chasing-votes-in-the-gulf-modi-and-erdogan-turn-to-campaigning-abroad/>).

without severing ties outright. The Middle East is a crucial component of Türkiye's expansive diplomatic activism. According to the recently published *Global Diplomacy Index 2024*, Türkiye ranks as the world's third most active diplomatic player, trailing only China and the United States. It is noteworthy that many of its newly-opened diplomatic missions are in the Middle East and Africa⁽³⁾.

Yet, this is not merely a story about Türkiye; it is a snapshot of a region in flux, where alliances are shifting, old rivalries are fading, and new power dynamics are emerging. Türkiye, with its calculated strategic moves, is poised to play a pivotal role in this evolving geopolitical landscape. While one cannot predict whether Ankara will succeed in its balancing act, one thing is certain: the Middle East's future is inextricably linked to the trajectory of Türkiye's ambitions.

TÜRKIYE'S POLICY OF STRATEGIC DIVERSIFICATION

Over the past two decades, trade has become a key driver of Türkiye's economic development. In the late 2010s, the country strategically reoriented its trade towards the Arab

world, witnessing a significant increase in exports. Trade volume with Arab countries skyrocketed from \$9 billion⁽⁴⁾ in 2005 to \$46 billion in 2022⁽⁵⁾.

Within North Africa, viewed as a gateway to the wider African market, Algeria and Egypt are Türkiye's most important trading partners. Erdoğan's frequent visits to Algeria (seven between 2005 and 2023 as both prime minister and president) demonstrate Türkiye's desire to cultivate friendly relations. In 2023, Türkiye reached its \$5 billion investment target in Algeria, surpassing France as the leading foreign investor outside Algeria's hydrocarbon sector⁽⁶⁾. Over 1 400⁽⁷⁾ Turkish companies now operate in Algeria, compared to France's 500⁽⁸⁾. Beyond trade, Algeria ranks as Ankara's fourth-largest gas supplier. State-owned companies Sonatrach (Algeria) and Botaş (Türkiye) have extended⁽⁹⁾ their natural gas agreements until 2027, ensuring Algeria's continued annual supply of 4.4 billion cubic metres (bcm)⁽¹⁰⁾ to Türkiye. Beyond trade, Turkish construction giants such as Atlas Grup, Özgür San, Doruk Construction and Elbayrak have capitalised on the reputational setbacks suffered by Chinese contractors, securing contracts for major housing projects⁽¹¹⁾ in Algeria over the past ten years.

With Egypt, the relationship is more complicated, oscillating between periods of close cooperation and significant tensions. Recently

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- (3) Lowy Institute, 'Key findings – 2024 Global Diplomacy Index' (https://globaldiplomacyindex.lowyinstitute.org/key_findings).
- (4) 'Policy in Turkey drives trade with Middle East', *MEED*, 2 July 2012 (<https://www.meed.com/policy-in-turkey-drives-trade-with-middle-east/>).
- (5) Kumar, P., 'Turkey's trade with GCC soars 11-fold in two decades', *Arabian Gulf Business Insight*, 13 November 2023 (<https://www.agbi.com/finance/2023/11/turkeys-trade-with-gcc-soars-11-fold-in-2-decades/>).
- (6) 'Algeria keen to open new horizons in ties with Türkiye', *TRT World*, 2022 (<https://www.trtworld.com/turkey/algeria-keen-to-open-new-horizons-in-ties-with-t%C3%BCrkiye-59628>).
- (7) Ibid.
- (8) 'Le ministère de l'Europe et des Affaires étrangères, 'France and Algeria' (<https://www.diplomatie.gouv.fr/en/country-files/algeria/france-and-algeria-64943/>).
- (9) 'Algeria's Sonatrach, Turkey's BOTAS renew gas deal', *AA Energy*, 11 September 2018 (<https://www.aa.com.tr/en/energy/natural-gas/algerias-sonatrach-turkeys-botas-renew-gas-deal/21552>).
- (10) 'Turkey extends LNG supply deal with Algeria', *Offshore Technology*, 22 November 2023 (<https://www.offshore-technology.com/news/turkey-algeria-lng-supply-deal/>).
- (11) 'Logements sociaux dorés sur tranche pour les turcs Atlas, Ozgur et Doruk', *Africa Intelligence*, 27 January 2021 (<https://www.africaintelligence.fr/afrique-du-nord/2021/01/27/logements-sociaux-dores-sur-tranche-pour-les-turcs-atlas-ozgur-et-doruk,109637717-art>).

there has been a cautious *rapprochement* between the two countries. The 2013 military overthrow of President Morsi in Egypt marked a dramatic turning point. President Erdoğan, a staunch supporter of Morsi and the Muslim Brotherhood, vehemently condemned the coup, calling Abdel Fattah El-Sisi an ‘illegitimate tyrant’⁽¹²⁾, and offered refuge to Egyptian exiles, including senior Brotherhood leaders, in Türkiye. This ignited a period of intense animosity characterised by media attacks, diplomatic expulsions, and competition for regional influence.

Despite these tensions, economic pragmatism has prevailed. Trade between Türkiye and Egypt has increased steadily, with Turkish exports to Egypt growing at an average of 11.3% annually for the past 26 years⁽¹³⁾. This trend accelerated in early 2021, driven by internal challenges in both countries. For Türkiye, diversifying energy sources became critical, and Egypt’s growing Liquefied Natural Gas (LNG) exports presented a lucrative opportunity⁽¹⁴⁾. Similarly Egypt, facing its own economic challenges, saw potential benefits in forging closer ties with Türkiye. The country seeks to bolster its economy through renewable energy and tourism.

On the energy front, initiatives like the Benban Solar Park demonstrate their commitment to sustainability. Both countries are undergoing transformations⁽¹⁵⁾ to align with the EU Green Deal, creating opportunities for collaboration in areas such as utilising EU funding, organising business-to-business conferences, and sharing expertise on climate-friendly

agricultural practices. In the tourism sector, Egypt introduced new measures in March 2023 to attract visitors, allowing tourists from Türkiye and other countries to obtain visas upon arrival. To capitalise on this opportunity, Turkish Airlines increased the number of its weekly flights to Egypt to 50, aiming to attract more Turkish travellers to Egypt. Similarly, Türkiye anticipates welcoming one million Egyptian tourists annually within the next five years.

It is worth noting that this *rapprochement* with Egypt might not have been possible without Türkiye’s normalisation of relations with the Gulf states. Türkiye’s relationship with the Gulf states soured during the Arab Spring due to its backing of the Muslim Brotherhood alongside Qatar. Tensions escalated due to the Jamal Khashoggi assassination incident at the Saudi consulate in Istanbul and the alleged involvement of the United Arab Emirates (UAE) in the failed *coup* attempt in Türkiye in 2016. Türkiye’s support for Qatar during the blockade in 2017 when Egypt, Saudi Arabia, the UAE and Bahrain severed diplomatic and trade ties with Doha further complicated regional dynamics⁽¹⁶⁾. The recent thaw in relations between Türkiye and the Gulf states, long characterised by tension and distrust, marks a surprising turn of events. However, this seemingly sudden shift is a calculated move by Ankara driven by deep economic anxieties⁽¹⁷⁾ and a growing need to secure political stability through external support.

To stabilise the economy in a challenging post-election period, Erdoğan has prioritised

(12) ‘A look at two decades of ties as Egypt, Turkey move to end rift’, Al Jazeera, 13 April 2023 (<https://www.aljazeera.com/news/2023/4/13/a-century-of-ties-as-egypt-and-turkey-patch-up-decade-long-rift>.)

(13) Observatory of Economic Complexity, ‘Trade between Turkey and Egypt’ (<https://oec.world/en/profile/bilateral-country/tur/partner/egy>).

(14) ‘Egypt emerges as key LNG supplier to Turkey in Q4’, S&P Global Commodity Insights, 9 December 2021 (<https://www.spglobal.com/commodityinsights/en/market-insights/latest-news/lng/120921-egypt-emerges-as-key-lng-supplier-to-turkey-in-q4>).

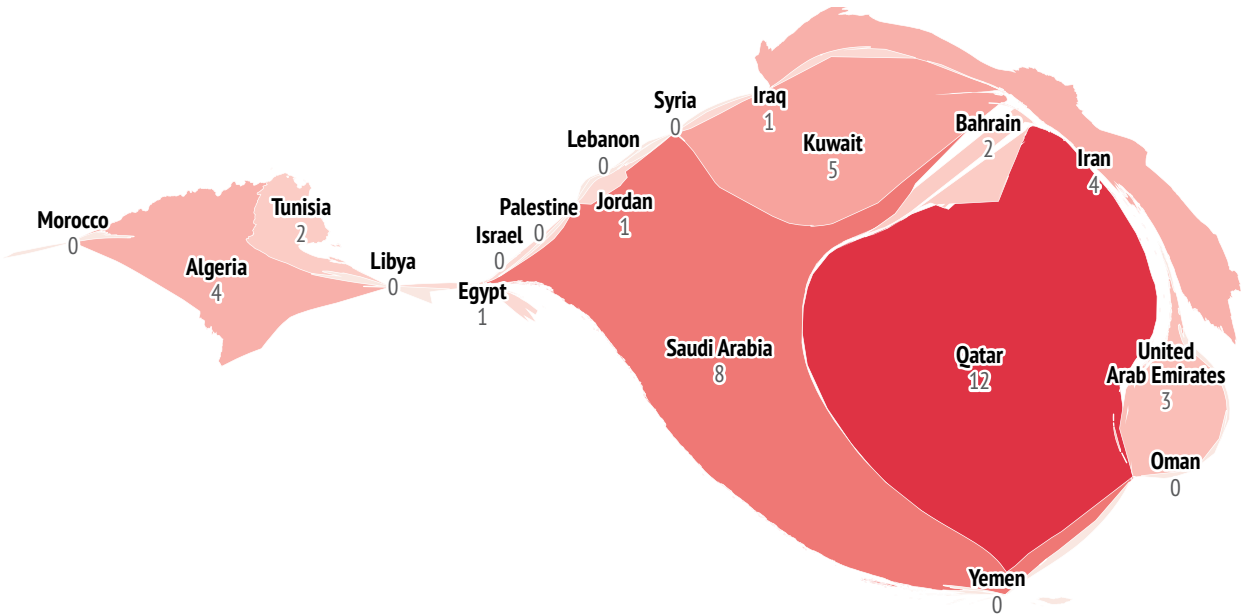
(15) Akpınar, P. and Ziada, D., ‘Putting Egypt-Turkey relations on a sustainable footing’, Middle East Institute, 29 August 2023 (<https://www.mei.edu/publications/putting-egypt-turkey-relations-sustainable-footing>).

(16) Aras, B. and Akpınar, P., *Turkish Foreign Policy and the Qatar Crisis*, Istanbul Policy Centre, 2017 (<https://ipc.sabanciuniv.edu/Content/Images/Document/turkish-foreign-policy-and-the-qatar-crisis-17ea79/turkish-foreign-policy-and-the-qatar-crisis-17ea79.pdf>).

(17) Kohlmann, T., ‘Is Turkey’s economy heading for a monetary policy U-turn?’, *DW*, 20 June 2023 (<https://www.dw.com/en/is-turkeys-economy-heading-for-monetary-policy-u-turn/a-65971445>).

Through Erdoğan's eyes

President Erdoğan's official visits in the Middle East and North Africa, 2014-2024



Data: EUISS own collection of data compiled from multiple sources, 2024; European Commission, GISCO, 2024

mending ties with the wealthy Gulf states. This strategy has yielded swift and significant financial assistance from the Gulf, which comes without constraints on monetary policy. Qatar and the UAE injected a combined \$20 billion⁽¹⁸⁾ through currency swap deals, while Saudi Arabia followed suit with a \$5 billion⁽¹⁹⁾ deposit into Türkiye's central bank. While aware that these transfers provide temporary relief, Türkiye seeks long-term solutions by targeting Middle Eastern investment and tourism to mitigate the impact of the dwindling number of Russian visitors⁽²⁰⁾. Weakened purchasing power and credit card restrictions further complicate the situation for Russian

tourists, putting additional strain on the Turkish economy.

During Qatar's period of diplomatic isolation (2017–2021), Türkiye displayed strong solidarity with the country, providing a military presence, vital supplies and diplomatic support. Qatar reciprocated by massively investing in Türkiye (a 500 % increase between 2016 and 2019⁽²¹⁾) and by advocating for Ankara in international forums such as the Arab League.

Türkiye's relationship with the UAE, which was previously strained, has undergone a significant shift in the last year. Following Qatar's reintegration into the Gulf states, Türkiye

(18) Kozok, F. and Hacaoglu, S., 'Turkey seeks Gulf cash for \$20 Billion bet on transit trade', Bloomberg, 30 November 2023 (<https://www.bloomberg.com/news/articles/2023-11-30/turkey-seeks-gulf-investment-for-20-billion-bet-on-transit-trade?embedded-checkout=true>).

(19) Turak, N., 'Saudi Arabia drops \$5 billion in Turkey's central bank to help its struggling economy', CNBC, 6 March 2023 (<https://www.cnbc.com/2023/03/06/saudi-arabia-deposits-5-billion-in-turkeys-central-bank.html#>).

(20) Osterlund, P.B., '“Now in shambles”': Turkey's tourism revival fades on Russian war', Al Jazeera, 2 May 2022 (<https://www.aljazeera.com/news/2022/5/2/lack-of-russian-visitors-to-turkey-contributes-to-tourism-slump>).

(21) Schaer, C., 'Turkey and the Gulf states: A complicated relationship', DW, 16 July 2023 (<https://www.dw.com/en/turkey-and-the-gulf-states-a-complicated-relationship/a-66236291>).

has successfully fostered a more cordial relationship with the UAE, marked by a trade pact signed in May 2023 with a potential value of \$40 billion⁽²²⁾ over five years. This agreement lays the foundation for closer ties between the two countries. Additionally, a \$4.7 billion⁽²³⁾ currency swap agreement signed in December 2023 between the two central banks aims to stabilise exchange rates and facilitate cross-border trade, further strengthening economic ties.

On 22 April this year, Türkiye concluded a significant agreement with the Gulf countries, involving a preliminary agreement on the initiation of the Development Road Project with Qatar, Iraq and the UAE, which aims to build a rail and road network connecting Iraq and Europe via Türkiye⁽²⁴⁾.

Türkiye's relationship with Saudi Arabia was once marked by deep tensions, but a new chapter characterised by a cautious thaw in relations has paved the way for potential economic collaboration. Both Türkiye and Saudi Arabia seek to diversify their economies and attract foreign investment. In 2023, bilateral trade between the two countries reached \$6.8 billion⁽²⁵⁾, rising by 50 % in two years, and both countries share the goal of increasing their bilateral trade to more than \$10 billion⁽²⁶⁾ in the short term. Saudi Arabia's state-owned oil giant, Aramco, has held discussions with Turkish construction firms regarding potential involvement in projects worth \$50 billion⁽²⁷⁾ over five years.

TÜRKIYE'S POLITICAL BALANCING ACT

In North Africa, Türkiye's presence in Syria and Libya has been seen as problematic. Türkiye and Algeria, for instance, have not always seen eye-to-eye. Concerning Syria, Algiers has sided (like its old Russian ally) with Bashar al-Assad, whom Türkiye opposes. Likewise on Libya, fearing increased instability and weapons proliferation along its almost 1 000 km shared border with the country, Algeria has advocated for peaceful solutions and was initially apprehensive about Türkiye's military involvement. While officially neutral, Algeria leans towards the Tripoli-based Government of National Accord (GNA), viewing Marshal Khalifa Haftar as a potential threat to regional stability. However, Türkiye's intervention in 2020, which helped stall Haftar's advance on Tripoli, led Algeria to adopt a more understanding stance.

Despite recent efforts to improve relations, the relationship between Türkiye and Egypt remains fragile due to unresolved issues and the weight of historical baggage. The Muslim Brotherhood remains a point of contention, alongside competing interests in various spheres - from the contested waters of the Eastern Mediterranean to war-torn Libya. The latter serves as a microcosm of this intricate relationship. For example, Türkiye's past support for opposing factions in the Libyan civil

In North Africa, Türkiye's presence in Syria and Libya has been seen as problematic.

- (22) Uppal, R., 'Turkey, United Arab Emirates sign trade agreement', Reuters, 3 March 2023 (<https://www.reuters.com/world/middle-east/turkey-united-arab-emirates-sign-trade-agreement-2023-03-03/>).
- (23) 'Big changes in United Arab Emirates foreign policy', Foreign Policy Research Institute (FPRI), 18 April 2023 (<https://www.fpri.org/article/2023/04/big-changes-in-united-arab-emirates-foreign-policy/#:~:text=In%20January%202022%2C%20the%20two,%2425%20billion%20in%20five%20years.>
- (24) 'Turkey, Qatar, Iraq and UAE to hold ministerial meeting on \$17 bn Gulf-Europe transportation project', Doha News, 2 May 2024 (<https://dohanews.co/turkey-iraq-qatar-and-uae-to-hold-ministerial-meeting-on-17bn-gulf-europe-transportation-project/#:~:text=The%20project%20will%20be%20carried,to%20be%20completed%20by%202028.>
- (25) 'Türkiye seeks to boost commercial ties with Saudi Arabia', *Hürriyet Daily News*, 16 February 2024 (<https://www.hurriyetdailynews.com/turkiye-seeks-to-boost-commercial-ties-with-saudi-arabia-190789.>
- (26) Ibid.
- (27) Ersoy, E. and Sykes, P., 'Aramco taps Turkish firms for \$50 billion building spree', Bloomberg, 1 June 2023 (<https://www.bloomberg.com/news/articles/2023-06-01/saudi-aramco-taps-turkish-firms-for-50-billion-building-sprees.>

war led to it being excluded from the East Mediterranean Gas Forum. However, there is a drive towards closer engagement due to developments such as the 2023 presidential elections (in which Erdoğan was narrowly re-elected) and the 2024 local elections (in which the AKP party suffered a heavy losses), as well as Türkiye's need for support from its traditional allies, converging interests in Libya, economic challenges in both countries, and collaboration in responding to humanitarian needs in Gaza ⁽²⁸⁾.

The Eastern Mediterranean (East Med) holds immense strategic significance for Türkiye within the framework of its *Mavi Vatan* 'Blue Homeland' doctrine. This doctrine, championed by the Turkish Navy, views the Aegean, Black Sea and Eastern Mediterranean as a unified maritime space critical to Türkiye's security and economic prosperity.

The EU also has a strategic interest in a stable and secure Eastern Mediterranean. A cooperative and mutually beneficial relationship with Türkiye is key. However, tensions flared up between the EU and Türkiye in May 2019 when Türkiye conducted drilling activities in waters surrounding Cyprus. In 2019, Türkiye offered military support to the Tripoli-based government in Libya, then under siege by forces loyal to Egypt- and UAE-backed Field Marshal Khalifa Haftar. In return, Tripoli signed a Memorandum of Understanding (MoU) establishing exclusive maritime economic zones (EEZs) in the Eastern Mediterranean, with terms heavily favouring Ankara. This agreement, strongly condemned by the EU in its December 2019 European Council Conclusions, purported to establish Turkish claims to maritime areas west of the 28th meridian. These territorial claims overlap with waters Greece considers part of its continental

shelf, including areas near islands like Rhodes and Crete. However, the future of the deal is uncertain. The Court of Appeal in Tripoli ruled to cancel the MoU on 24 February 2024. Additionally, Egypt and Greece signed an agreement in August 2020 partially demarcating their maritime boundaries.

Despite past differences, Egypt and Türkiye are now cautiously cooperating on the Libya issue. Both countries share a desire for regional stability, even if their long-term goals diverge. This tacit cooperation aims to preserve interim structures, support the UN-led political process, and prevent direct military confrontation.

However, delimitation of the continental shelf and EEZs remains unresolved. For the EU, addressing this issue requires good-faith dialogue and negotiations in accordance with international law, including the UN Convention on the Law of the Sea (UNCLOS).

As in Syria, Türkiye's involvement in the Syrian conflict encompasses several strategic dimensions, from humanitarian efforts to security operations. Sharing a 900 km border with Syria, Türkiye is host to around 3.6 million Syrian refugees ⁽²⁹⁾ and faces direct threats from the Kurdistan Workers' Party (PKK), which maintains close ties with Syrian Kurdish groups like the YPG/PYD and Syrian Democratic Forces (SDF). Türkiye perceives the establishment of an autonomous Kurdish region in Syria as a significant threat to its national security and has taken robust measures to prevent it. The Kurdish groups currently governing in northeastern Syria have been accused of autocratic practices. Türkiye's primary goals in Syria are twofold: preventing a further influx of refugees and preventing the formation of a Kurdish autonomous region. To achieve these objectives, Türkiye has deployed

In the Gulf, Türkiye's strongest partnership is with Qatar.

⁽²⁸⁾ 'Ankara, Cairo mend ties, signifying challenges for the Muslim Brotherhood', Arab News, 20 February 2024 (<https://www.arabnews.com/node/2463631/middle-east>).

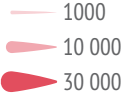
⁽²⁹⁾ UNHCR, 'Refugees and asylum-seekers in Turkey' (<https://www.unhcr.org/tr/en/refugees-and-asylum-seekers-in-turkey>).

Bases, bombs and drones

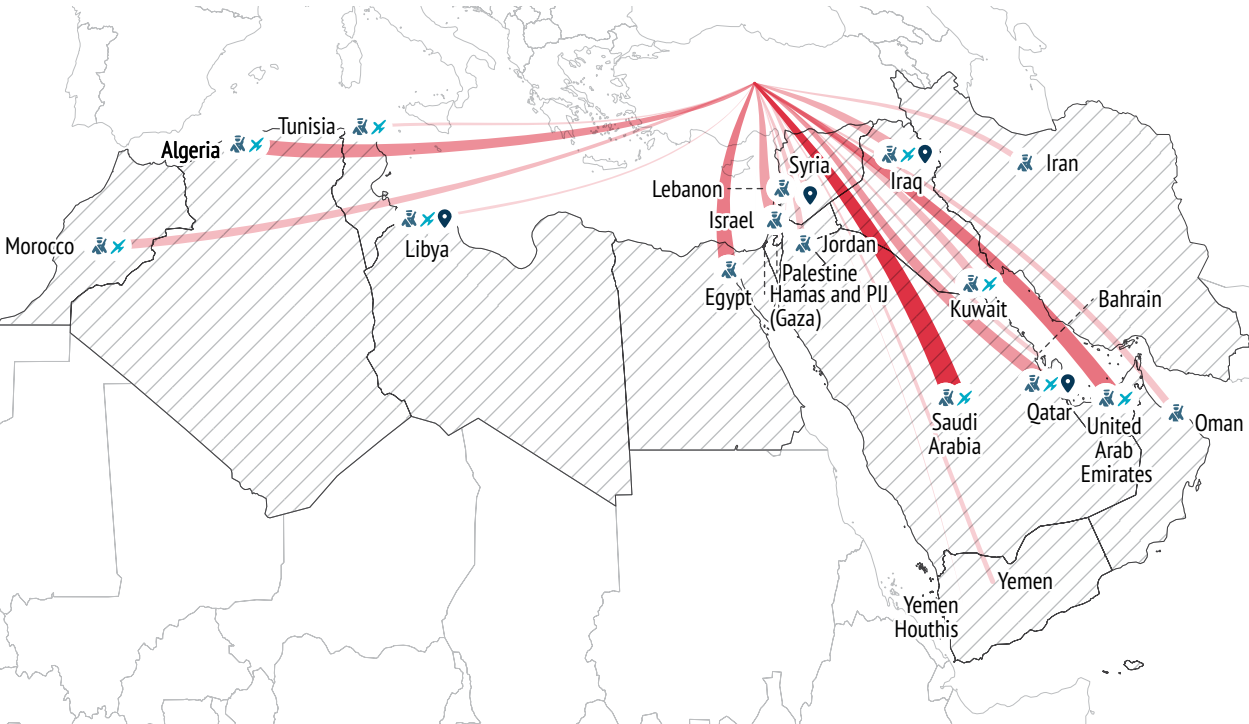
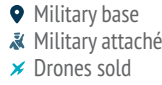
Exploring military bases, arms export value and drone sales in the Middle East and North Africa

Arms exports volume

SIPRI trend-indicator values, 2002–2022



Military cooperation



Data: SIPRI, ‘Arms Transfers Database’, 2002 – 2024; EUISS own collection of data compiled from multiple sources, 2024; European Commission, GISCO, 2024

troops and established a ‘safe zone’ along its border, shifting its focus from ousting Assad to containing Kurdish ambitions.

Despite its opposition to Assad and differences with other regional players, Türkiye’s military interventions have yielded limited success. Türkiye remains aligned with the EU in its reluctance to re-engage with Assad, partly due to scepticism about Syria’s ability to curb PKK activities. However, its recent diplomatic outreach to regional actors with which it previously had strained relations may pave the way for potential diplomatic engagement with Syria. Additional elements of Türkiye’s involvement include a military base in Dabiq, humanitarian presence through organisations

like the Humanitarian Relief Foundation (IHH) and the Turkish Red Crescent, and media presence through Anadolu Agency’s office in Azaz, Idlib. Although formal diplomatic ties between the two countries are severed (with no embassy present since the civil war and a suspended free trade agreement), Turkish airlines still operate flights to Damascus and Aleppo.

In the Gulf, Türkiye’s strongest partnership is with Qatar. This mutually beneficial partnership offers advantages to both countries. Türkiye’s military strength shields Qatar from Saudi Arabia and Emirati pressure, allowing Qatar to pursue an independent foreign policy. Conversely, partnering with Qatar strengthens Ankara’s image in the Muslim world and

bolsters its regional influence. With President Erdoğan's re-election, the relationship is likely to remain strong for the next five years. This could lead to increased Qatari investments in Türkiye, expansion of Turkish economic and social projects in Qatar, and potentially a larger Turkish military presence in Doha. Furthermore, Qatar was the first customer for Türkiye's TB2 drone in 2018⁽³⁰⁾. Beyond bilateral ties, collaboration on broader regional issues might be possible. Both countries could cooperate in any future normalisation efforts with Syria, with a focus on facilitating the return of Syrian refugees, a significant issue of domestic concern in Türkiye. Türkiye has generously hosted a large number of Syrians seeking safety. It is believed that 80 % of the 4 million refugees living in Türkiye are Syrians. But the deteriorating economic situation is contributing to resentment towards them and tensions with the local populations regarding their presence⁽³¹⁾.

The potential for defence collaboration is a growing area of focus in the relationship between Türkiye and the UAE. The UAE's reported interest in acquiring Bayraktar TB2 drones highlights this trend⁽³²⁾. While initial reports suggested a purchase of 120 drones, the exact details and finalisation of the deal remain unconfirmed⁽³³⁾. However, the delivery of 20 drones in November 2023 indicates progress

in this area⁽³⁴⁾. Despite these positive developments, some potential points of tension persist. Türkiye's military operations in northern Iraq and Syria and its position in the ongoing Sudanese conflict could create political friction with the UAE.

Defence ties are also developing between Türkiye and Saudi Arabia. In 2022, Saudi purchased 46 Karayel armed UAVs⁽³⁵⁾, and in 2023, the country agreed to buy Turkish drones. While the value of the contract was not disclosed, Baykar CEO Haluk Bayraktar claimed it to be the largest defence and aviation export agreement in Turkish history⁽³⁶⁾.

TÜRKIYE'S COMMITMENT TO HUMANITARIAN AID AND EDUCATION

Today, Türkiye has emerged as a major player in humanitarian aid within the MENA region. Türkiye is the biggest donor in the world⁽³⁷⁾ in terms of per capita humanitarian spending relative to national income⁽³⁸⁾. Cultural and

(30) 'Qatar to procure armed Bayraktar TB2 UAVs', *Defence Turkey*, June 2018 (<https://www.defenceturkey.com/en/content/qatar-to-procure-armed-bayraktar-tb2-uavs-3050>).

(31) According to a Syrian Barometer report published in 2021, there is significantly less acceptance of and solidarity towards refugees in Turkish society. The 'solidarity' initially observed has given way to 'tolerance' and to demands that Syrian refugees should be sent back to their country. See: Erdogan, M., 'A framework for achieving social, cohesion with Syrians in Türkiye', *Syrian Barometer*, 2021, p. 9 (<https://www.unhcr.org/tr/wp-content/uploads/sites/14/2022/12/SB-2021-English-01122022.pdf>).

(32) Soylu, R., 'Bayraktar TB2: UAE in talks to buy large number of armed drones from Turkey', *Middle East Eye*, 8 September 2022 (<https://www.middleeasteye.net/news/bayraktar-tb2-uae-turkey-talks-buy-large-number-drones>).

(33) Bakir, A., 'The UAE just received twenty drones from Turkey: What's the backstory?', Atlantic Council, 16 November 2022 (<https://www.atlanticcouncil.org/blogs/menasource/the-uae-just-received-twenty-drones-from-turkey-whats-the-backstory/>).

(34) Ibid.

(35) 'Karayel-SU Tactical UAV System', *Lentatek* (<https://www.lentatek.com/en/solutions/karayel-su-tactical-uav-system>).

(36) El Yaakoubi, A., 'Saudi Arabia buys Turkish drones during Erdogan's visit', Reuters, 18 July 2023 (<https://www.reuters.com/world/middle-east/saudi-arabia-turkey-sign-mous-energy-defence-other-fields-2023-07-18/>).

(37) Ergocun, G., 'Turkey continues to be ranked among top donor countries', Anadolu Agency, 10 July 2021 (<https://www.aa.com.tr/en/world/turkey-continues-to-be-ranked-among-top-donor-countries/2300237>).

(38) This rise can be attributed to two key factors. Firstly, the collapse of the Soviet Union led to the creation of new Turkic and Ottoman-origin states. This established a natural connection for Türkiye's Turkish Cooperation and Coordination Agency (TİKA) to offer support. Secondly, regional conflicts, such as the tragedies in Bosnia, Kosovo and Palestine, sparked the creation of Turkish NGOs dedicated to delivering aid in war zones.

religious ties demonstrably influence Türkiye's role as a humanitarian actor. A study conducted during the pandemic revealed a significant correlation between historical connections to the Ottoman Empire and aid distribution. Countries with such ties received over five times more aid than those without. Interestingly, Turkic-speaking nations with an Ottoman past received twice as much aid as Muslim nations with similar historical ties. This highlights the combined influence of cultural and religious factors in shaping Türkiye's humanitarian efforts⁽³⁹⁾.

This pattern of offering critical aid in times of crisis is further demonstrated in Türkiye's involvement with Somalia and Syria, recognised as two primary pillars of its humanitarian diplomacy⁽⁴⁰⁾. Türkiye's humanitarian efforts and Official Development Assistance (ODA) often work in tandem as part of Türkiye's broader soft power strategy. In 2021, the Middle East was the primary recipient of Türkiye's ODA, with \$6.8 billion⁽⁴¹⁾ allocated to the region, followed by Asia and Africa. Demonstrating its commitment to the Middle East, Türkiye allocated 91.1 % of its gross bilateral ODA in 2021 to its top 10 recipients. Significantly, five of these nations – Syria, Palestine, Iraq, Afghanistan and Libya – are located within the region, with Syria receiving the lion's share⁽⁴²⁾.

Türkiye's humanitarian efforts focus on three main areas: emergency assistance and medical

relief, infrastructure development, and investment in social and human capital. Emergency assistance and medical relief target the early stages of crises, drawing upon Türkiye's growing capabilities in the health sector. Over the past two decades, Türkiye has become a major hub for health tourism, attracting patients mainly from Libya, Germany and Russia. This reflects Türkiye's growing role in medical humanitarianism, which includes the deployment of mobile clinics, medical buses, equipment and mobile hospitals, as well as donations of medication. These efforts illustrate

Cultural and religious ties demonstrably influence Türkiye's role as a humanitarian actor.

Türkiye's policy of leveraging its burgeoning health sector to deliver medical humanitarian aid. During the Covid-19 crisis, Türkiye emerged as a significant player in pandemic diplomacy.

Since the Hamas attack on Israel on 7 October and the subsequent Israeli military response in the Gaza Strip, Türkiye has inten-

sified its humanitarian efforts in Gaza, mobilising institutions like the Kızılay-Turkish Red Crescent (in collaboration with the Egyptian Red Crescent), the Turkish Cooperation and Coordination Agency (TİKA), the Ministry of Defence, the Ministry of Health, and several NGOs. This aid includes cash donation campaigns, the deployment of a field hospital, Turkish health practitioners and other experts, and essential supplies such as fuel, generators, medical supplies, food packages, hot meals, water, clothing, baby-child items, hygiene kits, and blankets⁽⁴³⁾.

(39) Güngör, B., 'Foreign aid during the Covid-19 pandemic: evidence from Türkiye', *Southeast European and Black Sea Studies*, Vol. 21, No 3, 2021, pp. 337-352: p.344.

(40) Akpınar, P., 'Türkiye's peacebuilding in Somalia: The limits of humanitarian diplomacy', *Turkish Studies*, Vol. 14, No 4, 2013, pp.735-757.

(41) OECD iLibrary, Development Cooperation Profiles, 'Türkiye' (<https://www.oecd-ilibrary.org/sites/714276e8-en/index.html?itemId=/content/component/714276e8-en#:~:text=T%C3%BCrkiye's%20total%20official%20development%20assistance,notes%20behind%20the%20profile%20here>).

(42) Ibid.

(43) Turkish Presidency's Directorate of Communications, *Türkiye's Peace Diplomacy for the Just Cause of Palestine*, Istanbul, 2023, pp.559-566 (https://www.iletisim.gov.tr/images/uploads/dosyalar/Filistin_Kitab%C4%B1_I%CC%87ngilizce_kapak%C4%B1.pdf).

The İHH-Humanitarian Relief Foundation, a prominent actor in the 2010 Mavi Marmara/Gaza flotilla raid⁽⁴⁴⁾, is a key player in humanitarian efforts. Through its Gaza office İHH leads one of the largest operations, which currently involves organising a new flotilla mission to deliver aid to Gaza. The NGO has distributed 58 170 food packages, 444 072 hot meals, 1 000 children's clothes, over 5 530 hygiene products, 10 000 blankets, and nine hospital beds, among other items⁽⁴⁵⁾.

Education is a key pillar of Türkiye's soft power and humanitarian diplomacy, with a particular focus on the MENA region. Türkiye has become a leading destination for international students, ranking 10th worldwide and hosting 301 694 students in the 2021-2022 academic year⁽⁴⁶⁾. Its integration into the European education system through participation in the Bologna Process and programmes like Erasmus, Marie Curie and Socrates play an important role in its appeal. Additionally, Türkiye's own Mevlana Exchange Programme facilitates academic exchanges with institutions worldwide. Türkiye offers significant support to Syrian students and collaborates on scholarship programmes for refugees through partnerships with entities like DAFI⁽⁴⁷⁾, UNHCR, the European Union, the Islamic Development Bank, and the Organisation of Islamic Cooperation (OIC).

Türkiye offers educational opportunities through its national institutions, schools

established abroad by Turkish entities, and by providing capacity-building programmes and educational support funded by its ODA to MENA countries. Currently, out of the 188 960 foreign students who registered in Turkish schools in 2023, 163 073 are Syrian refugees and approximately 7 000 are refugees from Afghanistan⁽⁴⁸⁾. While Türkiye has seen an increase in Arab students, Europe remains a preferred destination for many. Cultural ties and established programmes continue to draw

significant numbers of students from the region. France alone, for example, continues to be a magnet for students from the Maghreb. In 2022, France hosted over 44 000 Moroccan students, the largest international student group. Algerians and Tunisians also make up a sizeable portion of the international student body there, accounting

for nearly 30 000 and 13 000 students respectively. Initiatives like Erasmus+ further contribute to Europe's attractiveness as a destination for students, facilitating educational exchange for over 15 000 students annually⁽⁴⁹⁾.

Türkiye also offers scholarships to foreign students as part of its 'Türkiye Scholarships Program', which provides comprehensive support to its recipients, including university placement, scholarships, tuition fees, health-care, accommodation, language courses and travel support⁽⁵⁰⁾.

The distribution of scholarships reflects a pattern similar to Türkiye's pandemic aid

(44) Aras, B. and Akpınar, P., 'The role of humanitarian NGOs in Türkiye's peacebuilding', *International Peacekeeping*, Vol. 22, No 3, 2015, pp. 230-247.

(45) Humanitarian Relief Foundation, 'Palestine: Gaza - Waiting for emergency aid' (<https://ihh.org.tr/en/palestine-gaza>).

(46) 'Turkey hosting 300,000 international students', *The Pie News*, 9 August 2023 (<https://thepienews.com/news/turkey-hosting-300000-international-students-in-202223/>).

(47) DAFI, UNHCR, 'Information sheet: DAFI Türkiye scholarship programme' (https://www.unhcr.org/tr/wp-content/uploads/sites/14/2017/02/dafi_information_sheet_turkey_eng.pdf).

(48) 'Yabancı uyruklu öğrenci sayısı 1 milyona dayandı - Ekonomim [SNIPPET]' ['The number of foreign students reached one million'], *Ekonomim*, 25 November 2023 (<https://www.ekonomim.com/egitim/yabanci-uyruklu-ogrenci-sayisi-1-milyona-dayandi-haberi-717552>).

(49) 'Étudiants étrangers en France: Les Marocains toujours en tête [Moroccan students in France: Moroccans still top the list]', *Aujourd'hui le Maroc*, 26 March 2024 (<https://aujourd'hui.ma/societe/etudiants-etrangers-en-france-les-marocains-toujours-en-tete-2>).

(50) Türkiye Bursları, 'About Türkiye Scholarships' (<https://www.turkiyeburslari.gov.tr/about>).

distribution, focusing on Turkic-speaking and Muslim countries. Out of the 4 316 scholarships offered in 2022, the MENA region received 15 % of the scholarships, placing it second behind Central Asia and the South Caucasus (19 %). Notably, Syrian students represent the largest recipient group within the MENA region⁽⁵¹⁾.

While the majority of Turkish schools abroad are located in Africa, Türkiye's Maarif Foundation only operates three in the Middle East – in Afghanistan, Iraq and Tunisia⁽⁵²⁾. Preserving cultural heritage constitutes another important aspect of Türkiye's ODA in the Middle East. This includes the restoration and reconstruction of cultural and historical sites, safeguarding Ottoman heritage and supporting cultural projects. Examples include the restoration of ancient ruins, historical buildings and cultural landmarks. These projects are mostly carried out under the aegis of TİKA, sometimes in cooperation with the Ministry of Culture.

For instance, in Iraq, TİKA recently restored the Nebi Danyal Tomb at the Kirkuk Fortress, established the Kaleiçi Park and Recreation Area, and renovated the Ottoman Officers Cemetery, the Imam Azam Mosque, the Mausoleum of Abdul-Qadir Gilani, and the Qaysari Bazaar in Baghdad. Similar efforts have been undertaken in other countries. In Libya, an Ottoman mosque in Tripoli was restored, while in Algeria, Türkiye oversaw the restoration of the Ketchaoua Mosque⁽⁵³⁾. Beyond restoration projects, Türkiye has also constructed new cultural facilities. This includes a cultural centre for Duris Turkmans in Lebanon, as

well the conference hall of Şehit Müftü Hasan Halid Public High School in Beirut. In Tunisia, Türkiye established a manuscript digitisation laboratory at the Rakkada National Museum of Islamic Arts and built a state-of-the-art television studio at the Tunisian News Agency (TAP)⁽⁵⁴⁾. The restoration of the Hadım Süleyman Pasha Mosque, built in 1528 in Egypt, further exemplifies Türkiye's commitment to the preservation of Ottoman heritage in the region⁽⁵⁵⁾.

As part of Türkiye's cultural diplomacy, these projects aim to preserve and promote cultural diversity, strengthen cultural ties, and contribute to the region's socio-economic development.

While significant, Türkiye's role in humanitarian efforts faces certain challenges. One concern is the perception of political motives behind its interventions, particularly in regions with which it has historical ties or where it has strategic interests. Such perceptions could potentially undermine the impartiality and effectiveness of these efforts. Another challenge is the strain that undertaking interventions on such a large scale may place on its capacity and resources, particularly in addressing major humanitarian crises or protracted conflicts. Furthermore, its involvement in neighbouring regions can exacerbate existing tensions if not carefully managed.

At home, Türkiye faces challenges in integrating its large refugee population, notwithstanding its generosity in hosting them. Many Syrian refugees in Türkiye work without permits, leaving them vulnerable to

(51) Republic of Türkiye, Ministry of Culture and Tourism and Presidency for Turks Abroad and Related Communities, 'Türkiye Scholarships Annual Report', 2022, pp.37–8.

(52) Türkiye Maarif Foundation, 'Dünyada Maarif' ['Maarif in the World'] (<https://turkiyemaarif.org/dunyada-maarif>).

(53) 'Turkey restores symbolic mosque in Algeria', Anadolu Agency, 16 December 2017 (<https://www.aa.com.tr/en/culture-and-art/turkey-restores-symbolic-mosque-in-algeria/1006745#>).

(54) Turkish Cooperation and Coordination Agency, 'TİKA implemented over 200 projects and activities in Tunisia in 12 years', 2 April 2024 (<https://tika.gov.tr/en/tika-implemented-over-200-projects-and-activities-in-tunisia-in-12-years/>).

(55) GZT, 'Mısır'daki Hadım Süleyman Paşa Camii Restorasyonun Ardından Yeniden Açıldı' ['The Hadım Süleyman Pasha Mosque in Egypt reopened after restoration'] 26 March 2024 (<https://www.gzt.com/mecra/misirdaki-hadim-suleyman-pasa-camii-restorasyonun-ardindan-yeniden-acildi-3770302>).

exploitation⁽⁵⁶⁾. Failure to effectively address these challenges could strain social cohesion and worsen existing vulnerabilities. The influx of refugees puts great strain on Türkiye's resources, leading to overcrowded camps and highlighting the need for increased international collaboration.

Moreover, the February 2023 earthquake that devastated a number of Turkish cities, causing more than 50 000 casualties⁽⁵⁷⁾, exposed deficiencies in the country's disaster management mechanisms. The stark contrast between Türkiye's domestic disaster response and its international efforts highlights these weaknesses. Limited resources, weak infrastructure, political instability and a lack of cross-sector coordination are major contributing factors.

CONCLUSION

Türkiye's ascent in the MENA and the Gulf is undeniable. Its cultural influence, humanitarian efforts and expanding economic ties are reshaping the regional landscape. This rise reflects a broader transformation of a region in flux, where alliances are shifting and redefining the power dynamics previously shaped by established players such as Europe and the United States. Türkiye finds itself at the heart of these tectonic shifts in the Arab world. However, Türkiye's ability to project its hard and soft power abroad hinges on its ability to address pressing domestic vulnerabilities. These include a fragile economy and internal political and security concerns.

The success of its efforts will determine not just Türkiye's future but also the trajectory of the region as a whole. As it navigates this complex landscape, Ankara has the potential to become a crucial mediator, fostering

collaboration and promoting regional stability. However, a misstep could inadvertently exacerbate existing challenges. Closely observing Türkiye's strategic moves and their impact on the evolving geopolitical landscape will be essential to understanding the future course of this pivotal region.

The EU is faced with a multifaceted situation in the region. On the one hand, a successful outcome to Türkiye's mediation efforts, leading to regional collaboration and stability, could pave the way for a more constructive relationship with the EU. This could unlock economic benefits like joint resource exploration and development in the Eastern Mediterranean, while also improving overall security in the region, bolstering trade routes and potentially reducing military tensions. On the other hand, an increasingly unstable Eastern Mediterranean would raise security concerns for the EU and its Member States, stalling cooperation and hindering dialogue.

(56) Turak, A. and Gökçe, O., 'Syrian refugees in Türkiye need better access to formal jobs', Brookings, 14 March 2023 (<https://www.brookings.edu/articles/syrian-refugees-in-Türkiye-need-better-access-to-formal-jobs/>).

(57) TRT Haber, 'Depremde can kaybı 50 bin 783' ['Death toll in earthquake: 50,783'], 1 March 2023 (<https://www.trthaber.com/haber/gundem/depremden-can-kaybi-50-bin-783-762132.html>). Accessed March 26, 2024.

CHAPTER 4

TÜRKIYE'S LONG GAME IN AFRICA

A dynamic path to influence

by
ROSSELLA MARANGIO

INTRODUCTION

In the last two decades, Türkiye has stepped up its involvement in Africa. Its multifaceted foreign policy approach encompasses diplomacy, economics, humanitarian aid, development and security. In its dealings with the continent Türkiye emphasises closeness and solidarity with African countries, leveraging its geographical position, perceived non-colonial history and, in Muslim-majority countries, shared religious ties. Public diplomacy plays a key role, with Türkiye's First Lady, Emine Erdoğan, accompanying her husband on official visits to 24 sub-Saharan African countries since 2014.

Türkiye's investments in Somalia since 2011 showcase its distinct strategy, challenging common perceptions of the country as unsafe and unstable. Through a combination of material support, investments, and perceived empathy, Türkiye has expanded its influence in Africa, opening doors for Turkish businesses, resource access and political influence. However, its pursuit of economic gains and political positioning raises questions about its true motives. Recent agreements on maritime capacity building in Somalia and on access to resources, as well as Ankara's muted response

to anti-colonial sentiment in Western Africa (which drew accusations of information manipulation), indicate a certain degree of opportunism rather than purely selfless advocacy. Türkiye's economic focus in its African policy serves a dual purpose: expanding its political influence and securing domestic support by creating opportunities for Turkish companies, including access to the continent's vast natural resources and a rapidly growing market. Moreover, the benefits of Turkish investment in Africa, as manifest in increased availability of consumer goods and local job creation, positively impact Türkiye's image in the continent.

Overall, Türkiye has positioned itself as a reliable ally for Africa, despite having a smaller investment portfolio compared to other players like China. This chapter argues that Türkiye's strategic approach in Africa extends its influence beyond its financial and material contributions by resonating with both African elites and populations. This, however, creates a complex dynamic with the EU, as Türkiye straddles the roles of partner and competitor.

Turkish tracks

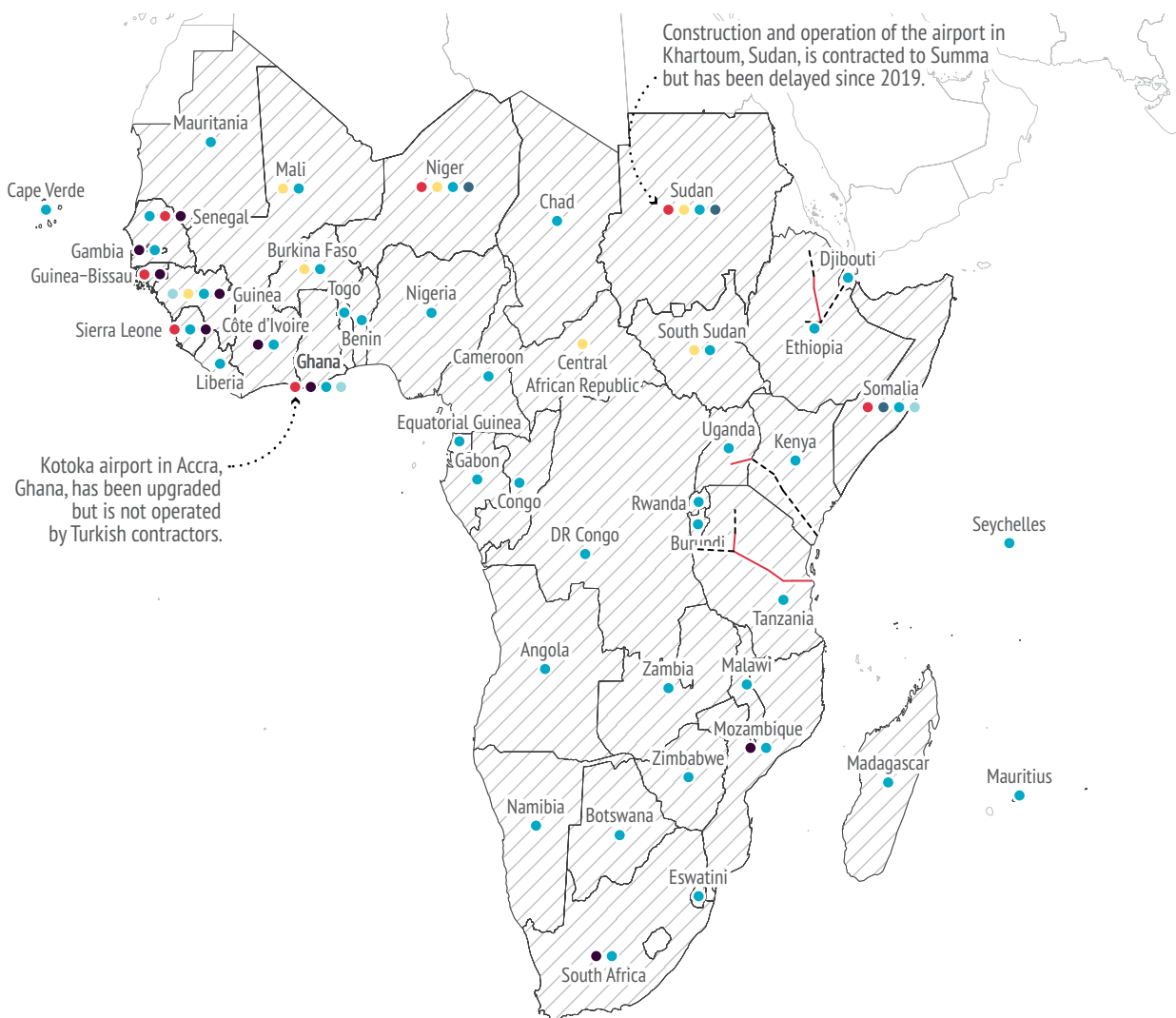
Business councils and Turkish-built major projects

Türkiye's growing influence on the continent includes investments in infrastructure projects such as ports, railways, energy provision and airports often situated along strategic trade routes.

These investments often enable long-term operating concessions that drive additional economic activity. Subsequently, in many countries significant investments are made in commercial assets such as hotels, conference buildings and sport arenas. The expansion of business councils by the Foreign Economic Relations Board (DEİK) promotes private-public partnerships and investments.

Infrastructure

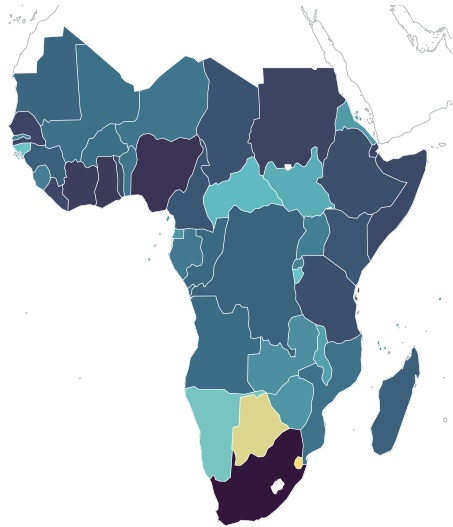
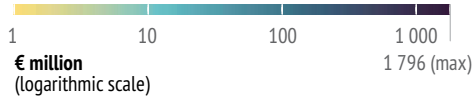
- Airport built/improved and operated
 - DEİK business council
 - Turkish-owned gold mine concession
 - Hospital built by Türkiye
 - Port built/improved and operated
 - LNG powership
- Railway built/planned by Turkish contractors
 - - - Connecting railways built/planned by other contractors



Mapping trade intensity

Total trade volume, 2023

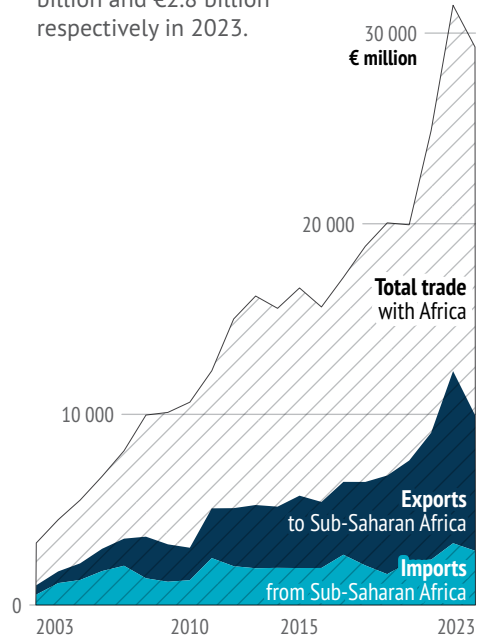
South Africa, Nigeria, Côte d'Ivoire, Ghana, and Sudan are Türkiye's top trading partners in sub-Saharan Africa. In 2023, these countries accounted for 41 % of the total trade volume, with South Africa alone contributing 18 %.



Growth in trade relations

Development of Türkiye's trade volume with Africa, 2003-2023

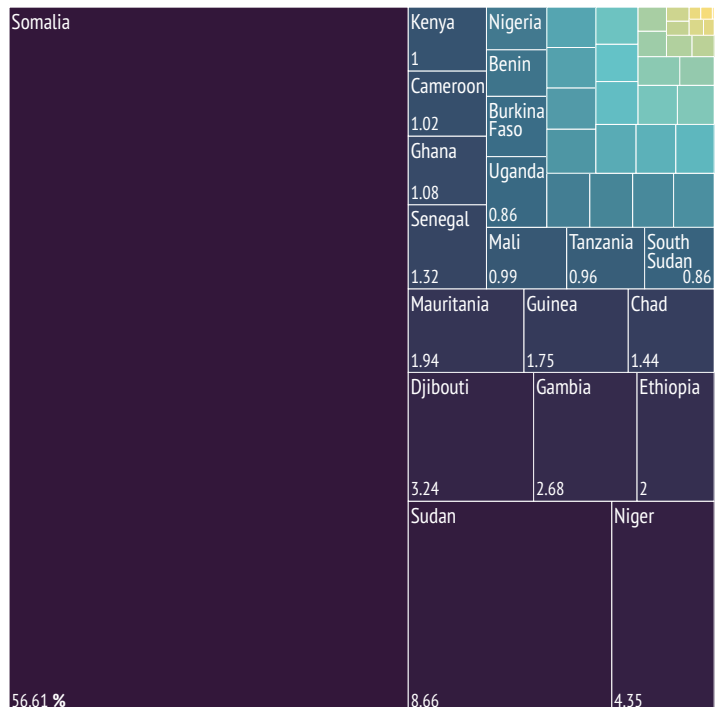
Trade between Türkiye and sub-Saharan Africa has surged by 800 % since 2003, with Turkish exports to the region outpacing imports, reaching €7.1 billion and €2.8 billion respectively in 2023.



Slicing the cake of bilateral support

Share of Türkiye's accumulated ODA disbursements in 2014-2022 totals €812 million

Since 2011 Somalia has had a special place in Turkish foreign relations, which is also mirrored in its aid policies. With a total of €812 million accumulated ODA disbursed between 2014-2022, Türkiye's aid remains relatively small compared to other actors.



Data: EUISS own collection of data compiled from multiple sources, 2024; European Commission, GISCO, 2024; TURKSTAT, 'International trade', 2024; OECD, ODA all measurements, 2023; European Central Bank, 'Annual average conversion rate to EUR', 2024

TURKISH INVESTMENTS IN AFRICA: BUILDING BRIDGES AND BUSINESS OPPORTUNITIES

Ankara's economic ties with Africa span various sectors, including infrastructure, industrial plants, power generation and hospitality. Facilitated by the rapid expansion of Turkish Airlines, now serving 45 destinations in 36 sub-Saharan African countries, economic relations have flourished in the past decade. While Türkiye's overall share in both trade and FDI remains limited, its growth rate in these areas has been impressive over the past decade.

Türkiye's trade with sub-Saharan Africa grew significantly between 2013 and 2023, with exports reaching €7.1 billion and imports amounting to €2.8 billion, reflecting a remarkable 55 % increase. However, Türkiye's overall share of the African market remains modest: in 2021, accounting for only 1.55 % of imports and 0.5 % of exports, compared to China's share of about 18 % in both categories. Similarly, Türkiye's FDI stock in sub-Saharan Africa, although experiencing a significant increase of 189 % since 2014, remained limited at €379 million in 2022. In contrast, China accounted for €35.8 billion in FDI stock in the same year, growing at a rate of 30 %, while France reached €41.8 billion with a growth rate of 12 %⁽¹⁾.

But Turkish influence and political clout in sub-Saharan Africa is expanding beyond just trade volumes. The Foreign Economic Relations Board (DEIK), tasked with managing

Turkish private sector relations abroad, has significantly expanded its Business Councils in sub-Saharan Africa, their number growing from 16 in 2014 to 44 in 2023. In comparison, Business France has eight regional offices covering 27 countries, and the Italian trade and investment agency operates nine offices covering 28 countries. Since 2016, regular Africa-Türkiye economic and business forums, jointly organised by the Turkish Ministry of Trade, the African Union (AU), and DEIK, aim to promote investments and public-private partnerships. The forums strategically focus on sectors with high development potential for African states, such as infrastructure, private investments, agro-processing and manufacturing, and more recently digital technology, innovation, energy, and tourism. In 2023, the forum attracted over 3 000 participants, including heads of state and government ministers, facilitating concrete discussions on business opportunities through plenary sessions, business-to-business and government-to-business meetings⁽²⁾.

Turkish infrastructure investments in sub-Saharan Africa have strategically expanded, giving Türkiye a competitive edge compared to other partners, particularly China. While these initially involved smaller projects, like the construction of the Ael Mek Nimir bridge in Khartoum in 2005, they have evolved into large-scale 'hub' infrastructure development. By enabling long-term concessions and stimulating additional economic investments, these larger-scale projects contribute to advancing Turkish interests, fostering local job creation and promoting continental trade. Companies like Summa and the Albayrak group have spearheaded the construction of numerous airports and ports across Eastern and Western Africa, often securing long-term operational concessions. These strategically located infrastructures, situated along major maritime routes for essential resources like oil and raw materials – such as the Gulf of

(1) OECD (<https://data-explorer.oecd.org/>) and SAIS China Africa Research Initiative, Johns Hopkins University (<https://www.sais-cari.org/chinese-investment-in-africa>).

(2) DEIK, Türkiye-Africa Business and Economic Forum and Joint Communiqué Africa-Turkey Economic and Business Forum, Istanbul, 21-22 October 2021 (<http://tabef.org/>).

Aden and the Gulf of Guinea – often generate additional benefits. Examples include conference centres, hotels or financial hubs (e.g. in Senegal, Niger and the Democratic Republic of Congo). Furthermore, powerships operated by the Turkish Karadeniz Holding Group often supply electricity to coastal cities (e.g. in the Gulf of Guinea). Recent investments by Turkish companies like Yapi Merkezi focus on railways connecting ports to inland regions, including landlocked countries.

This infrastructure network not only boosts commercial opportunities for African states but also benefits Turkish manufacturing investments and gold mining operations, particularly in the Sahel region. Ankara's overall strategy aims to bolster its political influence and advance Turkish economic interests, thereby garnering domestic support for its foreign policy towards Africa. Turkish investments in Africa provide access to resources, tap into a burgeoning market and secure concessions. Undeterred by potential short-term slowdowns in investment growth linked to domestic economic difficulties, Ankara is committed to maintaining its foothold in Africa. Recent agreements with Somalia, including support for local maritime capacities and joint ventures for onshore and offshore natural resource exploration, further illustrate this commitment⁽³⁾.

Ankara's overall strategy aims to bolster its political influence and advance Turkish economic interests.

TÜRKIYE'S SECURITY AND POLITICAL PIVOT: FROM MEDIATION TO DRONE POWER

Since 2008 Türkiye has actively expanded its political presence in Africa. That year it was recognised as a strategic partner by the AU, a relationship further strengthened by Ankara's annual financial contribution of about €700 000⁽⁴⁾. Currently, a robust network of 40 Turkish embassies in sub-Saharan Africa is reciprocated by diplomatic or consular representations accredited by sub-Saharan African countries to Türkiye. This diplomatic network supports Türkiye's expanding outreach in the region and bilateral ties. 2011 marked a turning point in Türkiye's political engagement as its involvement in Somalia intensified. In Somalia, Türkiye actively mediated between the central federal government and regional states, navigating complex challenges like decentralisation and power-sharing amidst ongoing conflict. Leveraging a comprehensive, multi-level approach focused on trust-building and fostering development in both the public and private sectors, Türkiye emerged as a mediator and partner for Somalia, in contrast to the state-centric approaches of European and American partners, and assumed a prominent role in supporting the Somali peace process⁽⁵⁾.

(3) Walker, T., 'Somalia-Türkiye maritime security partnership faces stormy waters', ISS Africa, 4 March 2024, (<https://issafrica.org/iss-today/somalia-tuerkiye-maritime-security-partnership-faces-stormy-waters>).

(4) This figure may be compared to the overall partners' contribution to the AU's budget estimated at more than €403 million in 2023. See: Türkiye-Africa Business and Economic Forum, 'Bilateral Relations' (<http://tabef.org/bilateral-relations.html>); African Union, *African Union Handbook 2023, 2023* (https://au.int/sites/default/files/documents/31829-doc-African_Union_Handbook_2023_ENGLISH.pdf).

(5) Donelli, F., *Turkey in Africa: Turkey's strategic involvement in sub-Saharan Africa*, Bloomsbury Publishing, London, 2021, pp. 82-89.

Recently, Türkiye has expanded its engagement in sub-Saharan Africa to include security and defence, employing 'drone diplomacy' alongside material support and training to bolster partners' security capabilities. Notably, between 2021 and 2022, Türkiye supplied Bayraktar TB-2 drones, armoured vehicles, and personnel carriers to several countries. Additionally, Türkiye has cemented its role as a security partner in Africa through various military and security agreements, and the establishment of its largest overseas military base in Mogadishu (Camp Turksom) in 2017 to train the Somali army.

Following developments in Libya and the Arab Spring, Türkiye intensified its efforts in Western Africa, combining economic investments with security cooperation initiatives. These initiatives included pledging about €4 million to the G5 Sahel joint force and concluding military cooperation agreements with countries such as Mali, Niger, Nigeria, Togo and Senegal, among others⁽⁶⁾. While positioning itself as a bridge between Africa and Europe and Asia, Türkiye also seeks to carve out a distinct path from European former colonial powers in Africa. This includes a degree of tolerance for anti-Western rhetoric, which has led to friction with some European countries, notably France⁽⁷⁾, but also Greece and Cyprus, due to Türkiye's growing geopolitical influence in the region.

Türkiye has extended its influence into Western Africa and the Sahel region, applying strategies developed in Eastern Africa

and capitalising on the recent French withdrawal following a series of *coups d'état* in the region⁽⁸⁾. In January and February 2024, transitional authorities from Burkina Faso and Niger visited Ankara, signalling continued relations despite unconstitutional changes of government. Türkiye appears to be cautiously filling the security gap left by France's withdrawal from the Sahel without jeopardising its partnerships with other members of the Economic Community of West African States (ECOWAS). This strategy aligns with both Türkiye's economic interests and the region's importance for wider stability.

Türkiye seeks to carve out a distinct path from European former colonial powers in Africa.

Türkiye's nuanced approach in Sudan exemplifies its strategy of balancing economic interests with its position relative to other actors. Following the fall of the al-Bashir regime in 2019 and subsequent conflicts between military factions in 2023, Türkiye prioritised multi-sectoral policies. It thus

positioned itself as a potential mediator amidst growing competition for influence, including from Gulf states⁽⁹⁾. Competition with the United Arab Emirates (UAE) in the Red Sea appears to be currently diminishing. This could be due, in part, to Türkiye's own domestic economic challenges which are limiting available resources and leading it to gravitate towards Gulf countries. Additionally, the potential impact of the January 2024 Memorandum of Understanding between Ethiopia and Somaliland, granting Ethiopia access to the sea, on Turkish and Emirati port investments in the region might have also led to a 'truce of convenience'.

(6) Özkan, M. and Kanté, A., 'West Africa and Turkey forge new security relations', ISS Africa, 31 March 2022 (<https://issafrica.org/iss-today/west-africa-and-turkey-forge-new-security-relations>).

(7) France 24, 'Macron blames Russia and Turkey for bolstering anti-French sentiment in Africa', 20 November 2020 (<https://www.france24.com/en/france/20201120-macron-blames-russia-and-turkey-for-bolstering-anti-french-sentiment-in-africa>).

(8) Lebovich, A. and van Heukelingen, N., 'Unravelling Turkish involvement in the Sahel: Geopolitics and local impact', Clingendael Policy Brief, July 2023 (https://www.clingendael.org/sites/default/files/2023-07/Policy_brief_Unravelling_Turkish_involvement_in_the_Sahel.pdf).

(9) Domingues Dos Santos, E., 'Le Soudan dans la géopolitique africaine de la Turquie : Une expérience sotto voce dans une région convoitée', Ifri, November 2023 (https://www.ifri.org/sites/default/files/atoms/files/ifri_domingues_dos_santos_soudan_turquie_nov2023.pdf).

Overall, Türkiye's image as an anti-colonial partner in Africa, coupled with its wide-ranging economic, cultural and security contributions, reinforces perceptions of it as a reliable ally capable of supporting Africa even in contentious matters. This commitment was demonstrated by Türkiye's abstention at the UN General Assembly vote on the Africa-sponsored resolution for a UN Convention on taxation in solidarity with African partners. This decision to abstain can be interpreted as aligning with Türkiye's pledge to work 'towards more converging positions in multilateral fora', as articulated in the 2021 declaration of the Africa-Türkiye Partnership Summit⁽¹⁰⁾.

BUILDING BONDS: TÜRKIYE'S ENGAGEMENT IN AFRICA

Ankara's strategy for cultivating relationships with African states hinges on a vast network of state and quasi-state organisations spanning humanitarian, development, cultural and religious spheres. A pivotal moment for Türkiye occurred in August 2011 when then-Prime Minister Erdoğan and his wife Emine visited Mogadishu. This marked the first visit by a non-African leader to Somalia in two decades, and coincided with the establishment of a Turkish embassy in Mogadishu. Given Somalia's prolonged conflict and precarious security situation, the visit drew significant attention across the continent. In Africa, Erdoğan's visit with his family was widely seen as a powerful gesture of solidarity and closeness to Somalia,

contrasting with the more cautious approach of other world leaders. In his subsequent address at the UN General Assembly in September 2011, Erdoğan described 'the tragedy of Somalia' as 'a shame for the international community', urging a more concerted global response to address it⁽¹¹⁾.

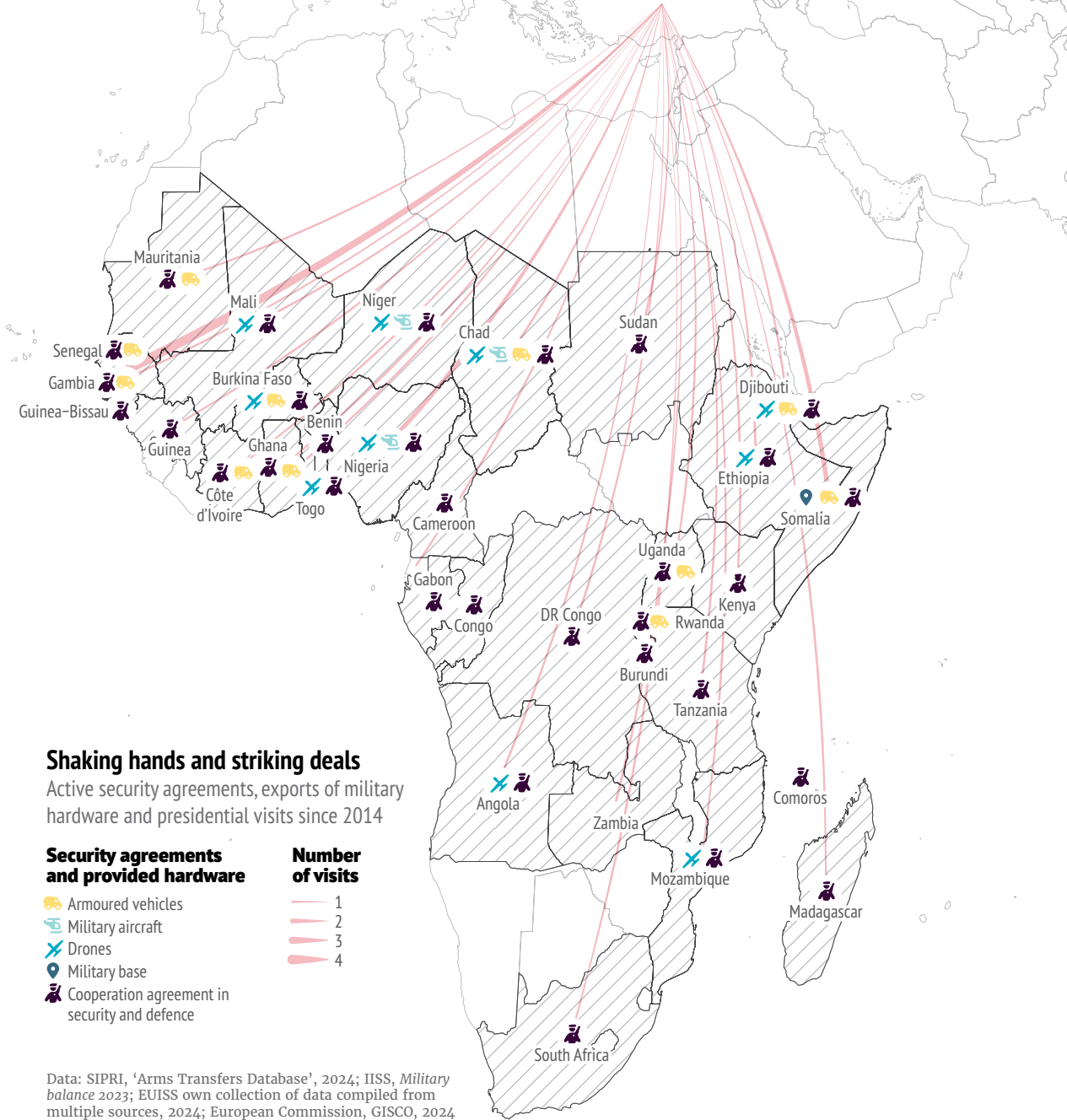
The presence of 18 offices of the Turkish Cooperation and Coordination Agency (TİKA) enhances Ankara's reputation as a key humanitarian and development actor in sub-Saharan Africa. This is demonstrated through initiatives like constructing training hospitals in Somalia and Sudan, which not only provide healthcare but also offer training to local staff. Türkiye's influence is further evident with over 160 schools in 25 sub-Saharan countries, mainly in West Africa, with Mali hosting the largest number. These schools are managed by the Maarif Foundation, which took over control of the Gülen schools after the 2016 attempted *coup* in Türkiye. While this transition initially posed challenges due to the Gülen movement's established reputation in Africa and Ankara's efforts to curtail its influence⁽¹²⁾, the Maarif Foundation has reassured partners of Türkiye's ongoing commitment to education.

Beyond education and development, Türkiye actively promotes Turkish culture and the Turkish language through ten centres operated by the Yunus Emre Institute in nine African countries. The Diyanet Foundation, a religious organisation under the Presidency of Religious Affairs, also plays a role with projects such as mosque renovations and the 'A Drop for Life' initiative, which has facilitated the construction of over 1 000 water wells. Cultural diplomacy efforts further extend to scholarship programmes for international students, covering tuition, stipends, health insurance, language and cultural activities, as well as flights.

(10) Third Africa-Türkiye Partnership Summit, Enhanced Partnership for Common Development And Prosperity – Declaration, 16–18 December 2021, Istanbul (https://au.int/sites/default/files/newsevents/reports/41270-tp-E_Africa-Turkiye_Summit_2021_Declaration.pdf).

(11) UN News, 'Tragedy of Somalia shames the world, Turkish leader tells UN', 23 September 2011 (<https://news.un.org/en/story/2011/09/388502>).

(12) See: *Turkey in Africa: Turkey's strategic involvement in sub-Saharan Africa*, op.cit., pp. 157–180.



In 2022 alone, the programme received 37 859 applications from sub-Saharan Africa, with 776 scholarships awarded to students from the region⁽¹³⁾. Ankara has also sponsored diplomatic training for junior diplomats from the AU and the Organisation of Islamic Cooperation (OIC), bridging political and cultural cooperation to expand its soft power outreach on the continent.

Among Türkiye's numerous outreach activities to Africa, the 'first lady diplomacy' of Emine Erdoğan merits particular recognition. Often overlooked in studies on Türkiye's African engagement, her dedication to fostering relations and her constant presence alongside her husband on state visits has significantly enhanced her country's image as a trusted partner for African countries. In addition to bilateral visits with African first ladies during

(13) Türkiye Bursları, 'About Türkiye Scholarships' (<https://www.turkiyeburslari.gov.tr/about>).

state visits, she actively participates in international meetings, organises first ladies' forums alongside Türkiye–Africa summits, and engages in business forums focusing on women and youth empowerment. These efforts consistently promote shared values and solidarity between Türkiye and Africa.

The establishment of the 'Africa House' in Ankara in 2016, aimed at promoting African culture and generating revenue for African women entrepreneurs through product sales, stands as a unique initiative by a partner country to promote Africa outside the continent. In 2021, Emine Erdoğan further demonstrated her commitment by publishing a book on her travels to Africa, with proceeds supporting Africa House activities, which she presented at the Turkish House in New York during the UN General Assembly ⁽¹⁴⁾. Through her sponsorship of Africa on the international stage, Emine Erdoğan seems to exemplify her husband's declared ambition for Türkiye 'to be the voice of Africa on international platforms' ⁽¹⁵⁾.

CONCLUSION: KEYS TO WINNING HEARTS AND MINDS?

Türkiye has swiftly expanded its engagement in sub-Saharan Africa through a multifaceted approach encompassing economic ventures, diplomatic ties, humanitarian efforts, development projects and cultural exchange initiatives. This strategy, bolstered by the significant involvement of the Turkish private sector, a commitment to non-interference in the internal affairs of African countries, and a narrative promoting Africa's global potential, forms the cornerstone of the Africa–Türkiye

partnership. At the heart of this partnership are two core principles: fostering a mutually beneficial relationship and reframing the portrayal of Africa as a continent rich with opportunities rather than one plagued by conflict and famine.

Additionally, Türkiye's extensive networks of state and quasi-state entities have fostered an image of the country as a partner capable of engaging with both elites and the general population. Overall, Türkiye's approach appears to resonate with Africa's aspirations for a more prominent role on the world stage. Compared to other partners, Türkiye is perceived as less paternalistic. Moreover, it provides timely infrastructure development of superior quality compared to China while also lending support to peace processes akin to the efforts undertaken by some Gulf states, particularly in the Horn of Africa.

Despite limitations in resource allocation, Türkiye has become a significant player in sub-Saharan Africa. It seeks to strengthen its strategic investments along vital maritime routes and resource-rich inland areas, while garnering domestic support through economic gains. However, Türkiye must balance these ambitions against the rising costs of increased competition and its own domestic economic challenges, such as high inflation and limited capital availability. Ankara will likely prudently prioritise investments with clear returns before engaging in competition with other players, notably Gulf countries.

Relations between Ankara and the EU in sub-Saharan Africa are intricate, given Türkiye's dual role as both a partner and a potential competitor for geopolitical influence in Africa. As Türkiye expands its presence in Western Africa, it has actively cultivated its image as a partner devoid of colonial baggage and conditionalities. This approach extends

(14) Anadolu Agency, 'Turkey's first lady to roll out new book on visits to Africa', 19 September 2021 (<https://www.aa.com.tr/en/africa/turkey-s-first-lady-to-roll-out-new-book-on-visits-to-africa/2368752>).

(15) Presidency of the Republic of Türkiye, 'Turkey works to be the voice of Africa on international platforms', June 2016 (<https://www.tccb.gov.tr/en/news/542/44217/turkiye-olarak-uluslararası-platformlarda-afrikanin-sesi-olmaya-gayret-ediyoruz>).

to its engagement with military authorities who have come to power through coups in the Sahel, reflecting its nuanced stance on democratic standards influenced by its own domestic political landscape. However, as Türkiye grapples with domestic economic challenges, the scope for cooperation with the EU on matters of mutual interest, such as security, may increase.

CONCLUSION

Charting a course for regional cooperation

by
DALIA GHANEM

The relationship between the EU and Türkiye is a complex one, marked by both cooperation and tension. Efforts by both sides to stop the escalatory dynamics in the Eastern Mediterranean have been pursued and must continue as stated by the European Commission Conclusions of June 2021. Türkiye's growing influence across the Balkans, South Caucasus, Africa and the Middle East presents an opportunity for both sides to refocus on common ground and build a strategic partnership. Broader geopolitical shifts also make such a partnership increasingly important for the EU. This chapter outlines policy recommendations for the EU to navigate this evolving landscape, capitalising on Türkiye's strengths while addressing potential areas of friction.

LEVERAGING TÜRKIYE'S STRENGTHS

As seen in the four previous chapters, Türkiye commands significant soft power which allows it to build bridges with countries across these regions. The EU can explore various ways to leverage this soft power to promote regional stability and cultural exchange.

Development cooperation: The EU-Türkiye Bridge for Development

The EU and Türkiye possess significant resources and expertise in development projects. By establishing a joint foundation for infrastructure, education, and healthcare projects they can maximise their regional impact. Such a foundation would require a clear mission statement outlining its goals, governance structure and funding model. For example, the foundation, which could be called 'the EU-Türkiye Bridge for Development' (EUTB Bridge), could have a board of directors comprising representatives from the EU, Türkiye and potentially other regional stakeholders. Funding could come from various sources, including the EU budget, Türkiye's national budget, international financial institutions and the private sector. This collaborative approach would foster research and development, ultimately promoting regional stability.

To accelerate public and private investments in key areas like connectivity, digitalisation, energy, transport, and the Green Deal, the signature of contracts under the Turkey Investment Platform should be prioritised. This requires close collaboration with European and international financial institutions. In this context, the European Investment Bank should be encouraged to resume its full range of operations in Türkiye.

Conflict resolution and mediation

Türkiye's diplomatic efforts in several countries across these regions deserve recognition. The EU can build upon this by establishing a dialogue platform, enabling joint efforts in conflict resolution initiatives. This would foster a more cooperative approach to regional security challenges. For instance, both sides could create a formal framework for joint EU-Türkiye conflict resolution efforts. This framework could take one of two forms:

1. A dedicated 'EU-Türkiye Conflict Resolution Task Force' with representatives from both parties' diplomatic services and conflict resolution experts;
2. 'Thematic Working Groups' that would focus on specific regional conflicts, for instance a 'South Caucasus Working Group', or a 'Sahel Working Group'. A more coordinated EU-Türkiye approach can contribute to de-escalation and conflict resolution in critical regions. Such an initiative would combine the EU's financial resources with Türkiye's regional influence and connections for maximum impact.

ADDRESSING AREAS OF POTENTIAL FRICTION

To cultivate a successful partnership, the EU and Türkiye need to acknowledge potential areas of friction and navigate them constructively. This concerns in particular managing the issue of Turkish accession as well as stepping up cooperation in the field of humanitarian aid and development.

Charting a new course: EU-Türkiye relations beyond accession

While immediate EU membership discussions might not be the sole or central focus, the EU must acknowledge Türkiye's aspirations and keep channels open for the future. Publicly acknowledging Türkiye's long-standing ambition to join the EU would demonstrate respect for Türkiye's strategic goals while setting realistic expectations about the current state of play. This avoids making accession the sole pillar of the relationship and allows for a more flexible partnership model.

Beyond politics, better aid: EU-Türkiye cooperation

Joint efforts can significantly improve the efficiency and transparency of humanitarian aid delivery. The EU and Türkiye can establish protocols to address concerns about the politicisation of aid, ensuring aid reaches those most in need. This collaboration could involve conducting joint needs assessments in crisis-affected regions to gain a comprehensive understanding of humanitarian needs and avoid duplication of efforts. The EU and Türkiye bring complementary strengths to the table. The EU can provide financial resources and expertise in logistics and coordination, while Türkiye can utilise its geographical proximity and cultural understanding to facilitate access to certain areas, as well as convince its closer partners – such as the Gulf States – to tap into their substantial financial resources. Finally, to address the issue of the politicisation of humanitarian aid, both the EU and Türkiye could develop protocols to ensure neutrality, impartiality and independence in the delivery of humanitarian assistance.

FOSTERING STRATEGIC DIALOGUE

Regular and open communication is crucial for building trust and navigating complex challenges. Some ways to achieve this are outlined below.

Regular consultations

The suspension of the EU–Türkiye High-level Dialogues on Economy, Energy, and Transport in 2019, due to Türkiye's unauthorised drilling activities in the Eastern Mediterranean, should be reversed. These high-level meetings serve as critical forums for discussing regional developments of mutual interest to the EU and Türkiye. Their resumption should be followed by the reconvening of the Association Council and the High-level Political Dialogue at the ministerial level. Reinstating these dialogues would contribute to a more transparent and well-functioning relationship, facilitating collaborative problem-solving. Besides, both the EU and Türkiye should seek to organise further rounds of sectoral High-level Dialogues on climate change, public health, migration and security, agriculture, and research and innovation.

Joint analysis and threat assessments

Information sharing and collaboration on threat assessments related to terrorism, extremism and regional instability are crucial. This strengthens regional security by enabling the anticipation and mitigation of potential threats. To this end, both actors should agree to conduct more structured and regular dialogues on foreign policy and regional issues. One approach could involve extending an invitation to the Turkish Foreign Minister to participate in relevant informal meetings of EU Foreign Ministers.

ADDRESSING SPECIFIC REGIONAL CHALLENGES

Beyond broad areas of cooperation, the EU and Türkiye can collaborate on regional challenges by deploying strategies tailored to the needs of specific sectors:

Western Balkans

- > *Investing in regional cooperation frameworks:* Türkiye can support the region by investing more political capital in regional cooperation frameworks, including through the SEECP. By maintaining a balanced approach with all countries and a strategic Euro-Atlantic posture, Ankara can use its influence to advocate for closer regional cooperation, ultimately accelerating EU integration for the countries of the Western Balkans.
- > *Harnessing expertise in disaster management:* Türkiye's experience in disaster management and environmental protection can be valuable for regional cooperation. Sharing expertise and best practices strengthens regional resilience in these critical areas.
- > *Promoting dialogue:* Türkiye can play a constructive role in preventing further security escalation by encouraging both Belgrade and Pristina not to give up on existing lines of communication and instead focus on small yet significant technical advancements. Türkiye's balanced and cautious stance *vis-à-vis* both Belgrade and Pristina allows for a more inclusive 'bottom-up' approach to dialogue, where both sides feel equally involved, unlike the often-criticised 'top-down' approach of the EU.
- > *Countering extremism:* Türkiye could contribute to curtailing Islamic extremism. Unlike actors like Saudi Arabia and Iran, Türkiye has a unique advantage due to its historical legacy, economic power, and

strategic and political influence with the majority Sunni Muslim population in the Balkans. This advantage can be utilised to counter the appeal of Shia Islam propagated by rival players. A joint EU/Türkiye community-based initiative focused on youth empowerment, social cohesion and outreach programmes to counter extremist narratives, particularly in rural and underprivileged communities, could be a powerful tool for achieving this.

South Caucasus

- > *Detering escalation:* The EU can impress upon Türkiye the importance of avoiding further escalation of the Armenia-Azerbaijan conflict and highlight the constructive role Ankara can play in deterring such escalation.
- > *Fostering peace and connectivity:* The EU can seek to persuade Türkiye to support a comprehensive peace agreement, leading to normalised relations, open borders, and facilitating connectivity projects in the region. International guarantees, loans and technical assistance for improved connectivity under the Middle Corridor (including the Syunik road and railroad, potentially reopening the Kars-Yerevan railroad) can incentivise progress on this front.
- > *Promoting a balanced regional order:* While acknowledging Türkiye's strategy of avoiding direct confrontation with Russia in the South Caucasus, the EU can emphasise the potential risks that Russian dominance here pose to regional instability. A more balanced regional order would benefit all parties involved.

MENA/Gulf

- > *Humanitarian and cultural cooperation:* The EU and Türkiye can partner to amplify humanitarian and cultural efforts in the MENA region. By combining emergency aid, infrastructure development and

investment in human capital, as exemplified by Türkiye's model, they can create a more sustainable impact. Collaboration on joint initiatives focusing on education, healthcare, vocational training, cultural exchange programmes and heritage preservation projects would draw on and showcase the strengths of both parties in soft power diplomacy. The EU could co-fund projects and provide expertise to enhance the impact of aid efforts, as well as offer expertise and support to Türkiye in improving its disaster management capabilities, as demonstrated by the challenges faced during the February 2023 earthquake.

- > *Facilitating dialogue and mediation:* The EU can encourage Türkiye to utilise its growing influence to facilitate dialogue and mediate conflicts in the MENA region. Given that Türkiye is also the co-founder of the Friends of Mediation Initiative within the UN together with Finland, the EU can support these efforts by providing resources and expertise for mediation and peace-building initiatives. The EU could also join forces with Türkiye on diplomatic efforts in areas where they share mutual interests, such as fostering stability in Libya, Syria or Gaza.
- > *Boosting regional economic integration:* The EU can collaborate with Türkiye to facilitate trade agreements and economic partnerships between the EU, Türkiye and MENA countries. Furthermore, encouraging joint infrastructure projects and knowledge sharing would boost regional economic integration.
- > *Addressing regional security:* The EU and Türkiye can collaborate to develop a comprehensive and holistic approach to energy security and resource management in the MENA region. This can involve promoting renewable energy solutions and encouraging cooperation on water resource management. Given Türkiye's unique position as a NATO member in proximity to conflict zones and its experience in managing refugee flows and combating terrorism, the EU

can support joint efforts to address these common security challenges.

Africa

- > *Learning from successful models:* The EU can learn valuable lessons from Türkiye's successful engagement in sub-Saharan Africa. Combining large-scale infrastructure projects with social initiatives like schools and hospitals creates a more sustainable and impactful development strategy.
- > *Investing in regional growth:* Investing in hub-like projects can attract further private investment, stimulate intra-African trade, and address pressing needs like job creation and access to electricity. This focus on regional connectivity could significantly contribute to Africa's economic development.
- > *Strengthening the EU-Africa partnership:* The EU can enhance its partnership with the African Union by expanding participation from a wider range of stakeholders, including the private sector, cities, NGOs, and others. Türkiye's experience in stimulating job creation could be successfully replicated by the EU's private sector through working closely with the regional offices of the European Investment Bank.
- > *Leveraging soft power:* The EU can leverage its soft power potential by increasing educational exchanges with Africa, fostering long-term partnerships and mutual understanding.
- > *Collaborating on shared goals:* Türkiye and the EU can cooperate on areas of shared interest in Africa such as green transitions, climate change mitigation, peace processes, and security cooperation, particularly in combating terrorism. Both parties should strive to maintain a collaborative approach that avoids undermining each other's partnerships on the continent.

ABBREVIATIONS

AKP

Justice and Development Party (*Adalet ve Kalkınma Partisi*)

AU

African Union

bcm

billion cubic metres

BTC

Baku–Tbilisi–Ceyhan pipeline

BTE

Baku–Tbilisi–Erzurum pipeline

CHP

Republican People's Party (*Cumhuriyet Halk Partisi*)

DAFI

Albert Einstein German Academic Refugee Initiative Fund (*scholarship programme*)

DEIK

Foreign Economic Relations Board

ECOWAS

Economic Community of West African States

FDI

Foreign direct investment

GNA

Government of National Accord

IHH

Foundation for Human Rights and Freedoms and Humanitarian Relief

KFOR

Kosovo Force

LNG

Liquefied Natural Gas

MC

Middle Corridor

MENA

Middle East and North Africa

MoU

Memorandum of Understanding

NATO

North Atlantic Treaty Organization

NGO

Non-governmental organisation

ODA

Official Development Assistance

OIC

Organisation of Islamic Cooperation

PIJ

Palestinian Islamic Jihad

PKK

Kuridistan Workers' Party (*Partiya Karkerên Kurdistanê*)

PYD

Syrian Kurdish Democratic Union Party (*Partiya Yekîtiya Demokrat*)

SDF

Syrian Democratic Forces

SEECF

Southeast European Cooperation Process

TANAP

Trans-Anatolian pipeline

TAP

Trans-Adriatic pipeline

TIKA

Turkish Cooperation and Coordination Agency

TRT

Turkish Radio and Television Cooperation

UAE

United Arab Emirates

UN

United Nations

UNHCR

UN High Commissioner for Refugees

UNSC

United Nations Security Council

USD

United States dollars

USSR

Union of Soviet Socialist Republics

YPG

People's Protection Units (*Yekîneyên Parastina Gel*)

YTB

Presidency for Turks Abroad and Related Communities (*Yurtdışı Türkler ve Akraba Topluluklar Başkanlığı*)

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Türkiye's footprint in various regions of the world has expanded. This is evident not only in economic terms but also in the country's projection of its soft power, reflected in a myriad of educational and outreach initiatives. It furthermore has a rising profile as a regional weapons supplier, particularly of armed drones. Under the leadership of Recep Tayyip Erdoğan, Ankara is clearly pursuing an ambitious vision in the diplomatic, economic and military spheres.

This *Chaillot Paper* examines Türkiye's presence in and interaction with four distinct regions in the world: the Western Balkans; the South Caucasus; the Middle East, North Africa and Gulf region; and Africa. It shows how engagement with these regions serves a dual purpose for Türkiye: diversifying partnerships to counter isolation and asserting strategic autonomy by distancing itself from the West.

Given Türkiye's increasingly transactional approach to international relations, the EU has a vested interest in understanding its motivations and strategies. Moreover, broader geopolitical shifts make it increasingly important for the EU to forge a constructive partnership with Türkiye, while addressing potential areas of friction.