

TURKEY'S QUEST FOR STRATEGIC AUTONOMY IN AN ERA OF MULTIPOLARITY

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Introduction

Turkey is a middle power strategically positioned at the intersection of key regions including the Middle East, Europe and the Black Sea region. The country has developed formidable military capabilities and a diverse economy, which is coupled by an ambitious foreign policy ethos merging Turkey's Ottoman past, the AKP's vision of Islam, plus a strong sense of patriotism and Turkey's position in the world. Due to its geopolitical location and multilayered connectivity with Europe and the non-Western world, global and regional developments directly feed into Turkish foreign policy. In this context, the 2008 global financial crisis, the retraction of the United States (US) from the Middle East, and the ensuing Arab uprisings presented before Turkey significant opportunities as a dramatic shift from a unipolar to a multipolar global order appeared to be underway. Middle powers, such as Turkey, could become more assertive and active within the shifting global and regional order. However, global power transitions also require caution and careful risk management, as systemic risks and uncertainties may increase.



Turkey's neighbourhood is a good case in point. The Middle East was in flux as a result of the eruption of what became to be known as the Arab uprisings. In their immediate aftermath, several Arab countries, including Tunisia and Egypt, appeared to have been democratically elected governments that were ideologically and politically aligned with the AKP's version of political Islam and its vision of what a new regional order in the Middle East might entail. Moreover, as "strong" Arab states fragmented, including Syria, Libya and Yemen, Turkey competed with regional powers such as Iran and Saudi Arabia for regional dominance. To this end, it sought to exert its influence in various conflict zones, especially Syria and Libya and support the Islamist governments elected to power, such as that of former Egyptian President Mohamed Morsi.

In response to this turbulent environment, Turkey's foreign policy elites predicated the country's foreign policy upon acquiring "strategic autonomy." What this conception entails and what is its foreign policy record a decade or so after its inception is the subject matter of this policy report. Examining the foreign policy record of Turkey's quest for strategic autonomy in relation to three key domains, security/diplomacy, trade and investments, and energy, we contend that the vision behind strategic autonomy has not materialised. Instead, Turkey finds itself facing security, economic, and political vulnerabilities brought about by the quest for strategic autonomy. As a way to reverse the trend, we advocate for Turkey to adopt a foreign policy based on carefully planned and long-term oriented interdependence policies compatible with its development goals and material power capabilities to reduce external dependencies in an increasingly multipolar world.

The global context: a shift towards multipolarity?

The last decade or so has been characterised by international turbulence. Global politics have been undergoing a significant transformation. The US-led unipolar system has been challenged militarily, politically, and economically, which has prompted a shift to multipolarity, that is, a world characterised by multiple centres of power. Posen attributes this shift to the rise of emerging powers, the globalising economy, and a significant redistribution of relative wealth and economic power from west to east.¹ Indicatively, whereas in 2000, the BRICS countries constituted 8 per cent of the world's GDP, by 2022, they comprised 26 per cent.²

This is not just a matter of moot academic debates; the consequences of the transition from unipolarity to multipolarity are widely felt. For example, the Obama administration had adopted a new "grand strategy" of pivoting to the Asia-Pacific, aimed at containing the rise of China as a counter-hegemonic power. Hillary Clinton, the then Secretary of State, declared that "the future of politics will be decided in Asia, not Afghanistan or Iraq, and the United States will be right at the centre of the action."³ In this context, the relative rollback of the United States from the Middle East has been an important development since President Obama announced that by the end of 2011, the 40,000-strong US military forces in Iraq would be withdrawn from the country. The decision prompted the process of US relative retraction from the region and other areas that the Obama administration did not see as strategically significant, including Eurasia. This was the background for two significant events where the US and the liberal international order it has led since the end of the Cold War were directly challenged.



One was the use of chemical weapons by the al-Assad regime against civilians opposing his rule in September 2013. Within a short space of the first verified use of chemical weapons in Syria, on 18 March 2014, Russia forcefully annexed the Crimean Peninsula from Ukraine,⁴ thus breaking another key principle of the post-Cold War rules-based international order: that the annexation of land by force would not be allowed.

The response by the US to both challenges, which was weak and ineffective, reflected the waning of unipolarity. It established an inspector force that would dismantle the arsenal of chemical weapons held by the Syrian army, but clearly, this did not work. According to the BBC, since the first chemical attack by the al-Assad regime in September 2013, the Syrian regime perpetrated 106 further attacks using chemical weapons between 2014-2018.⁵ The reaction by the US—or lack thereof, more precisely—to the Russian annexation of Crimea was equally ineffective and detrimental to the preservation of the liberal international order. Illustratively, following the annexation of Crimea, Russia deployed proxy forces into the Donbas region, which, again, did not elicit an effective US response, reflecting further US international retraction and the growing assertiveness of rival powers within an emerging multipolar world order.

These serious international political events had a compounding effect on the structural shift triggered by the 2008 global financial crisis, which kickstarted the transformation from a unipolar world order led by the US to a multipolar world (dis)order where great powers as well as middle powers vie for influence and engage in intense coalition building. In this vein, China invested vastly in acquiring natural resources

across Africa and Latin America and, in 2013, launched the Belt and Road initiative, which was hailed as one of the largest and most ambitious infrastructure projects.⁶ Concurrently, its political and military ambitions in the Pacific—from the island of Okinawa to its ambitions in relation to Taiwan—have become more conspicuous, though they may not be realisable in the immediate future.

A Middle East in flux

The shift from unipolarity to multipolarity, which had significant political, military, and economic implications for great power alignment, was coupled by regional upheaval in the Middle East. The key shift in this context was triggered by what became to be known as the ‘Arab uprisings’, which began in Tunisia in December 2010, when a fruit and vegetable vendor, Mohamad Bouazizi, set himself on fire in the town of Sidi Bouzid. Within three weeks, in January 2011, Tunisia’s strongman, President Zine El Abidine Ben Ali, fled to Saudi Arabia as Tunisia’s moderate Islamist party, Ennahda, which was banned under Ben Ali, won most seats in the elections. Drawing on its electoral success, Ennahda formed a coalition government with moderate, secular parties to plan a new constitution.⁷

Events in Tunisia had a contagion effect as demonstrations quickly spread to Egypt and other Arab states. Egypt’s long-standing president for more than 30 years, Hosni Mubarak, was ousted on Friday, 11 February, after mass demonstrations engulfed the Egyptian capital, Cairo. The country was put under what seemed at the time as the temporary rule of the Supreme Council of the Armed Forces (SCAF), which was followed by the victory of the Islamist candidate, Mohamed Morsi, in the first democratic



Presidential elections held in Egypt's history, in June 2012.⁸ The dramatic changes in Tunisia and Egypt were followed by political mobilisations against other long-standing rulers of Arab republics, including Bashar al-Assad of Syria, Muamar al-Ghaddafi of Libya and Muhamad Saleh of Yemen. These quick and dramatic changes raised the spectre of a possible repetition of the Velvet Revolutions that toppled East European Communist regimes in 1989-1991, which is why the regional flux was prematurely termed as the "Arab Spring." However, unlike Egypt and Tunisia, which experienced political changes but did not fragment, Syria, Libya, and Yemen were plunged into prolonged internal violent conflict. Consequently, the onset of the Arab uprisings in 2011 and its aftermath prompted a paradigmatic transformation in state structures and state-society relations in the Middle East. "Strong" Arab states collapsed into transnationalised civil wars, which led to a vicious cycle of state fragmentation, political instability, and intricate security challenges.

The articulation of global systemic changes and regional developments across North Africa and the Levant resulted in regional powers becoming increasingly assertive in their respective regions. Indeed, the fragmentation of "strong" Arab states opened new "spheres of influence", including Iraq, Lebanon, Libya, Syria and Yemen. The challenges and opportunities entailed by gaining a foothold in these spheres of influence prompted intense competition between rival blocs, pitting middle powers in the Middle East against each other. In this context, Iran, Saudi Arabia, and Turkey emerged as the leading contenders for regional power as each tried to expand its zone of influence in the region. Assuming a more active role was also a geopolitical choice for regional actors because

global and regional power shifts reshuffled existing alliances and exacerbated political, economic, and security-related uncertainty.

Concurrently, Russia took advantage of US retraction from the Middle East to extend its regional influence. This was the rationale for Russia's direct intervention in the Syrian civil war to support the embattled regime of Bashar al-Assad. To this end, Russia provided the Syrian regime with financial, political and, most importantly, military support, which included deploying Russian forces in Syria to back al-Assad's lethal campaign to suppress anti-regime forces, which were initially supported by Turkey, Saudi Arabia, and Western powers.

Whilst the eruption of the Arab uprisings amid the shift to multipolarity was initially perceived by Turkey, Saudi Arabia, and Iran as presenting several opportunities to increase their regional power, other countries took a more cautious approach. States vulnerable to the expansion of Iran and radical Islamist forces, such as Bahrain, Israel, Oman, and the United Arab Emirates, clearly felt threatened. This sense of alarm drove these countries into closer relations, fuelled by newly shared security interests, which was laying the basis for a potential Arab-Israeli axis to contain Iran and its allies, including Hamas, Hezbollah, Houthis, and the al-Assad regime. In this vein, the Israeli Prime Minister, Binyamin Netanyahu, stated the following in a speech he gave before the General Assembly of the United Nations on 1 October 2013:

The dangers of a nuclear-armed Iran and the emergence of other threats in our region have led many of our Arab neighbors to finally recognize that Israel is not their enemy. This affords us the opportunity to overcome



historic animosities and build new relationships, new friendships, and new hopes. Israel welcomes engagement with the wider Arab world. We hope that our common interests and common challenges will help us forge a more peaceful future.⁹

Turkey's quest for strategic autonomy, which is the subject of the next section, emerged against this complex global and regional environment following an active integration strategy the country pursued in the first decade of the 21st century.

Turkey's quest for autonomy: managing complexities

Since it rose to power in 2002, the AKP government sought to develop closer political, economic, and cultural ties with the countries in Turkey's neighbourhood, spanning a large area from the Black Sea region, Middle East, Caucasus, and the Balkans. These policies, however, did not come at the expense of its relations with the West, as during the same period, Ankara implemented a series of reforms to comply with the EU regulations and norms as it negotiated its accession candidacy to the EU. In this context, until the Arab uprisings, Turkey pursued an active engagement strategy across the full remit of its foreign relations, also called "zero problems with neighbours policy"; established high-level strategic councils with several states; and promoted bilateral trade and investments, human mobility, and visa-free travel in its neighbourhood.

The foreign policy framework of the Turkish government underwent a significant transformation in the 2010s. Parallel to the global power shifts towards a multipolar world order and growing uncertainty in its neighbourhood, which brought about the collapse of its zero problems

with neighbours policy, Turkey has increasingly sought to establish "strategic autonomy".¹⁰ Constituting an increasingly central motive in Turkish foreign policy, it consists of three elements. First, transactionalism has steadily come to dominate Turkey's interactions with its Western allies as Turkish policy makers aimed at reducing the country's security dependence on the US and European powers. Second, "multiple alignments," "flexible alliances," and "issue-based" cooperation have become a guiding feature of Turkish foreign policy behaviour. Third, as a way of adapting to the shift from a unipolar to a multipolar international order, the "quest for strategic autonomy" has meant developing closer ties with the non-Western world, including Russia and China.¹¹

Against this background, the Turkish ruling elite adopted a more critical approach to the hierarchical and exclusionary nature of the US-led international order. They sought to advocate substantive reforms of global governance institutions, such as the United Nations, develop closer ties with the global South and try to distinguish Turkey from the Western powers in key regions such as Africa and the Middle East. Also, the Turkish government progressively operated in a transactionalist framework with its Western partners. Turkey remains a member of NATO, and issue-based cooperation with the US and the EU still matters for its national security and economic development. However, the West ceased to represent a normative and political reference point. Accordingly, Turkey aims to develop closer ties with Russia and China on security, energy, trade, and investments. In a multipolar world, flexible alliances, compartmentalization, and transactionalism have become more common in shaping Turkish foreign policy.



One striking example is Turkey's approach to the Russia-Ukraine war. Ankara "did not recognize Russia's annexation of Crimea" in 2014¹² and condemned Russia's invasion of Ukraine in February 2022 as "a grave violation of international law."¹³ Moreover, Baykar Holding, one of Turkey's largest defence contractors, has provided UAVs to the Ukrainian army since 2019. On the other hand, Turkey purchased S-400 surface-to-air missiles from Russia despite significant objections from the US and other NATO members. Ankara also did not join the Western sanctions against Russia, and bilateral trade between the two countries has skyrocketed since February 2022. According to TUIK data, Turkey-Russia trade volume was 34.7 billion dollars in 2021; total trade increased to a record volume of 68.2 billion dollars at the end of 2022.

The drivers and implications of Turkey's quest for "strategic autonomy" thus paint a complex picture. On the one hand, it provides additional scope for Turkey to elevate its status in regional affairs. On the other hand, strategic autonomy requires managing multiple dependencies simultaneously in an uncertain world. The remainder of the brief highlights three of these domains in which the complexity of Turkey's foreign policy manifests itself: diplomacy and security, trade and investments, and energy.

Diplomacy and security

The post-2011 period in Turkish foreign policy is arguably one of the most turbulent episodes in the peacetime history of the country. Since the Arab uprisings, Turkey's relations with key regional actors have undergone significant transformations. In the wake of unprecedented mass protests in the Middle East and North Africa, the Turkish government saw a rare opportunity to exert Turkey's influence over the region. Thus,

Turkey endorsed the protestors and became a vocal critic of Arab authoritarian regimes, which was strongly illustrated when Prime Minister Recep Tayyip Erdoğan paid a historic visit to Egypt, Tunisia, and Libya in September 2011 to "emphasise his support to the Arab Spring."¹⁴ The government cultivated close ties with the Mohamed Morsi government following his victory in the 2012 elections in Egypt. In the Turkish Grand National Assembly, the Turkish foreign minister heralded the emergence of a new Middle East and claimed that Turkey would be "the owner, pioneer, and the servant of this new Middle East."¹⁵ The government also pursued shuttle diplomacy to convince the al-Assad regime in Syria to introduce political and economic reforms. In the initial phase, therefore, optimism and ambition prevailed in Ankara over cautiousness.

The Arab uprisings, however, did not unfold as expected by Turkey's foreign policy elites. Mohamed Morsi's removal from office with a military coup in 2013 dashed Turkey's hopes of having a regime in Egypt headed by a president fielded by the Muslim Brotherhood and other Islamist groups with ideological affinity with the AKP. The mass protests turning into a bloody civil war in Syria unleashed a long-lasting discord between the al-Assad regime and the Turkish government. The collapse of state structures in Syria led to various terrorist organisations carving out "safe havens" and organising themselves to launch deadly attacks. Turkey faced imminent security challenges on its southeast borders, with several terrorist attacks overwhelming the country, especially between May 2013 (when 52 civilians were killed in Reyhanli) and August 2016 (when 57 people were killed in Gaziantep).

Concurrently, the mass refugee flows from Syria, with whom Turkey has the longest land border, overstretched the country's resources.



According to official figures, as of the beginning of 2024, Turkey ranked number one in the world in hosting Syrian refugees, which amounted to 3.2 million.¹⁶ This challenge was compounded by the thousands of Afghan refugees fleeing following poorly planned and badly executed withdrawal of the American troops from Afghanistan.

Turkey pursued an open-door policy to the Syrian citizens fleeing from the war and the al-Assad regime's persecution. Ahmet Davutoğlu, the Foreign Minister at the time, stated, "I hope they will return to their homes as soon as possible... but know that if you have to stay here, our home is your home."¹⁷ With the prolongation of the civil war, most of the Syrian refugees preferred to stay in Turkey. Hence, forced migration became a contentious issue, significantly impacting the country's domestic politics and foreign affairs. On the economic side, the government has allocated significant resources to the Syrian refugees residing in the country, and "the total cost of hosting refugees in Turkey between 2011 and 2022 has been estimated to be about \$US50 billion."¹⁸ As Turkey's economic problems run deeper in recent years, refugees have also become a divisive topic in domestic politics. In an already polarised political context, forced migration formed another material and ideational cleavage, forcing the government to adopt a more cautious approach.

In the foreign policy domain, it reshaped Turkey's external relations. For example, one of the stated aims of Turkey's military interventions in northern Syria since 2016 has been to create a "safe zone" and resettle the Syrian refugees. Also, Turkey-EU relations were significantly impacted. Turkey and the EU reached a deal in 2016 to stem the flow of migrants to European countries. In return for Turkey hosting refugees, the EU agreed to provide financial support. More consequentially, however,

the EU-Turkey migration deal plagued bilateral relations. Turkey has effectively assumed the role of a "buffer state."¹⁹ Also, "transactionalism", devoid of a normative and strategic orientation, undermined the progressive logic of Turkey-EU relations. The socio-political risks and foreign policy challenges associated with forced migration are likely to remain a central issue in shaping Turkey's policy agenda at a time when multilateral institutions fail millions of refugees and international solidarity remains weak.

The challenge of forced migration generated by the Syrian civil war has been complemented by security issues. Since the early days of the Syrian conflict, the United Nations Security Council has become practically ineffective because of the "Russian-made brick wall at the UN."²⁰ On a broader scale, the hesitant approach of the Obama administration in Syria also frustrated the Turkish decision-makers, as they realised that the US had no intentions to intervene to topple the al-Assad regime militarily. In his election campaign, Obama promised to "bring the [American] troops home" and, after all, in the words of Hilary Clinton, "Syria was not Libya."²¹ As the civil war in Syria turned more violent and diplomatic initiatives failed to bring the conflict to a halt, Turkey was unilaterally involved in the conflict as threats to its national security were beginning to mount. Consequently, Turkish armed forces have launched a series of military operations in northern Syria since 2016 (Euphrates Shield, Olive Branch, Peace Spring, Spring Shield), targeting al-Bab, Afrin, Ras al-Ayn, Tel Abyad, and Idlib regions. The operations caused diplomatic rifts between Turkey and the Western powers. Turkey considered the Kurdish Democratic Union Party (PYD) and People's Protection Units (YPG) in northern Syria as a terrorist organisation with organic links with the PKK and launched military operations to eradicate

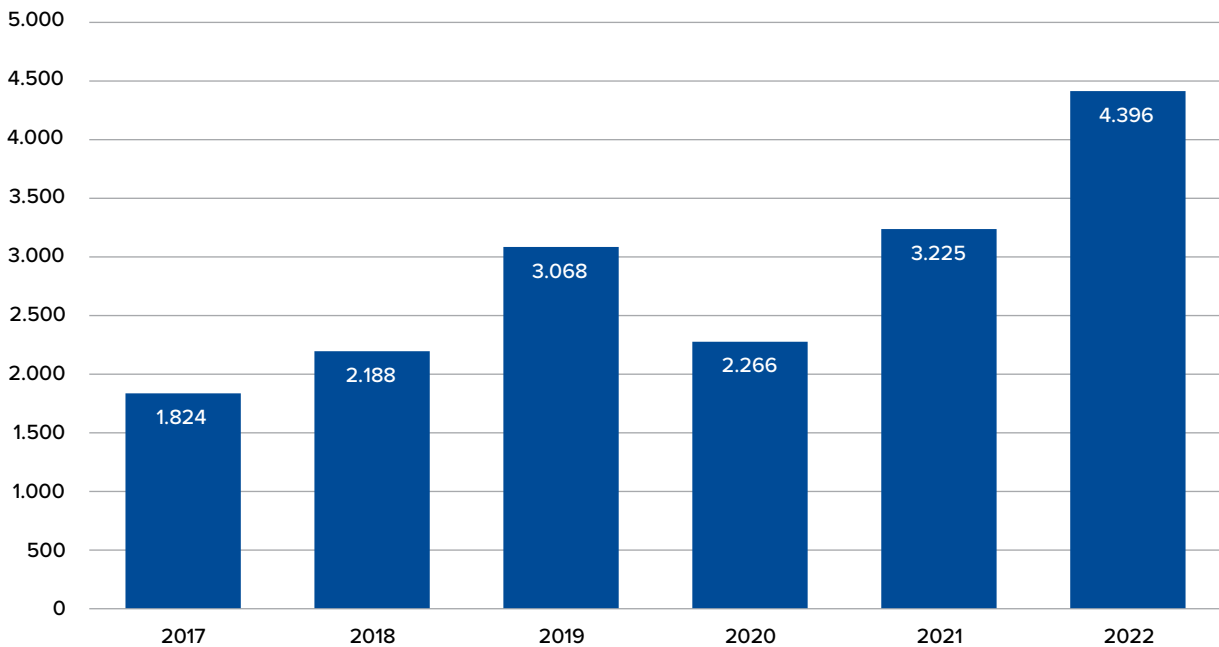


this threat on its southeastern borders; the United States, on the other hand, cooperated with the YPG forces in the fight against the ISIS threat. The complex nature of the Syrian conflict compelled Turkey to engage in a delicate balancing act between rival powers. Since Russia has been militarily involved in the conflict to support the al-Assad regime since September 2015, Turkey, along with Russia and Iran, sponsored the trilateral forum called the Astana Process in 2017 to discuss the future of the Syrian conflict. The Turkish government also reached a deal with Russia to purchase S-400 missiles, despite strong opposition from NATO partners, resulting in Turkey's removal from the F-35 programme by the US government in July 2019.²²

All these developments prompted Turkey to reduce its security dependence on external actors. The government prioritised developing new technologies in the indigenous defence

industry to increase self-reliance by investing in national weapon systems and exporting defence-related equipment to project national power and influence. In this sense, Unmanned Aerial Vehicles (UAVs) constitute the most striking aspect of Turkey's advancements in the defence industry. The initiatives in the indigenous defence industry that were commenced long-ago, started to yield significant results in the 2010s. Turkey's arms exports increased from 1.8 billion dollars in 2017 to 4.4 billion dollars in 2022 (figure 1). Bayraktar TB-2 drones, produced by the Baykar holding, became the main military export items. The UAVs proved effective in the early phases of the Russia-Ukraine war, providing an edge to the Ukrainian armed forces. It is also widely reported that the Azerbaijan army used the Turkish drones in the Nagorno-Karabakh War in 2020 that effectively tilted the military balance against Armenia.²³

Figure 1. Turkey's defence exports (million \$)



Source: Authors' figure based on Defense and Aerospace Industry Manufacturers Association annual reports



On the diplomatic front, however, Turkey entered a prolonged mode of crisis management in the 2010s. For the first time in the contemporary history of the country, Turkey had simultaneous diplomatic rifts with Syria, Israel, Egypt, Greece, Saudi Arabia, the United Arab Emirates, as well as the Western actors. Multiple discords with key regional actors significantly undermined Turkey's ambitions to carve out a more autonomous space. Therefore, the overstretch in Turkish foreign policy has culminated in Turkey's diplomatic position being significantly limited. The foreign policy challenges also exacerbated the serious problems faced by the Turkish economy. The country experienced two major currency shocks in 2018 and 2021, which destabilised domestic currency, and whilst the Turkish government maintained positive economic growth, this came at the expense of growing external debt and significant credit expansion. Turkey's trade deficit increased to a record 110 billion dollars in 2022.²⁴ The non-conventional monetary policy adopted in late 2021 triggered a cost of living crisis, worsening the already high income and wealth inequalities. Thus, according to official figures, annual inflation increased to almost 65 percent in 2023. The Gini Coefficient, which measures inequality in a country, increased to 0.43 in 2023 —from 0.39 in 2014.²⁵ The government required significant external funding to stabilise domestic currency and finance growing deficits. The mounting economic pressures emerged as another factor that prompted the government to mend ties with key regional actors. This was strongly illustrated by the normalisation process starting with Israel and continuing with Gulf countries and Egypt.

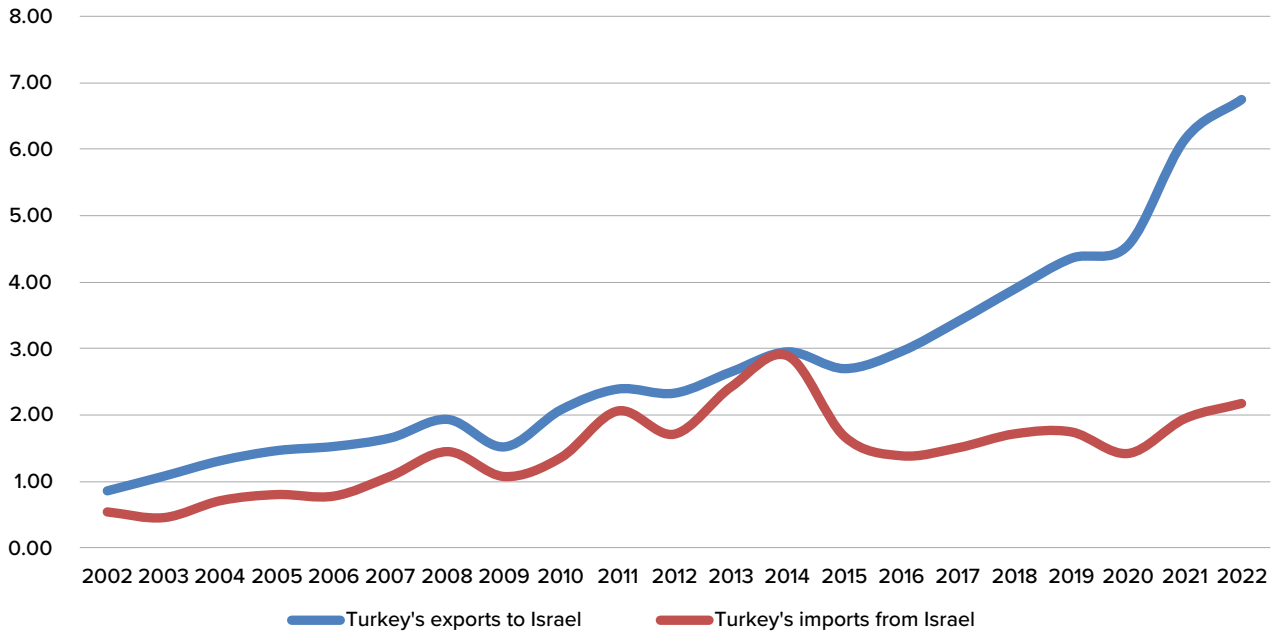
Trade and investment

Trade and investment constitute another fundamental domain where Turkey needs to strike a delicate balance. Historically, Turkey's trade regime is embedded in the Western framework. European markets constituted the top trade destination for Turkish firms. Turkey even signed a Customs Union deal with the EU in 1996 without becoming a member of the Union. In the first decade of the AKP government, economic instruments were actively used to establish closer ties with Turkey's neighbours. As one of the most industrialised and diversified economies in the Middle East, Turkey's foreign economic relations with the regional actors significantly expanded. The share of Middle and Near Eastern countries in Turkey's total trade increased from 7 per cent to 13 per cent between 2002 and 2011. However, the Arab uprisings and the subsequent collapse of state structures in the region slowed down this positive trend. For example, the power vacuum in Iraq, one of Turkey's main trade partners in the region, reduced Turkish exports to this country. In nominal dollar terms, after increasing to \$11.95 billion in 2013 from just \$700 million in 2003, Turkey's exports to Iraq stagnated, remaining \$11.77 billion in 2022. In relative terms, Iraq's share in Turkey's total exports increased from 1.75 per cent to 7.87 per cent —but decreased to 5 per cent in 2022.

At the same time, political tensions did not always feed into the economic domain of Turkey's bilateral ties. The Turkey-Israel relationship, which has undergone significant crises, is an important example. Despite the prolonged diplomatic crisis, bilateral trade volume with Israel increased from \$2.59 billion in 2009 to \$8.91 billion in 2022, with Turkey having



Figure 2. Turkey-Israel bilateral trade relations (billion \$)



Source: Authors' figure based on TUIK data

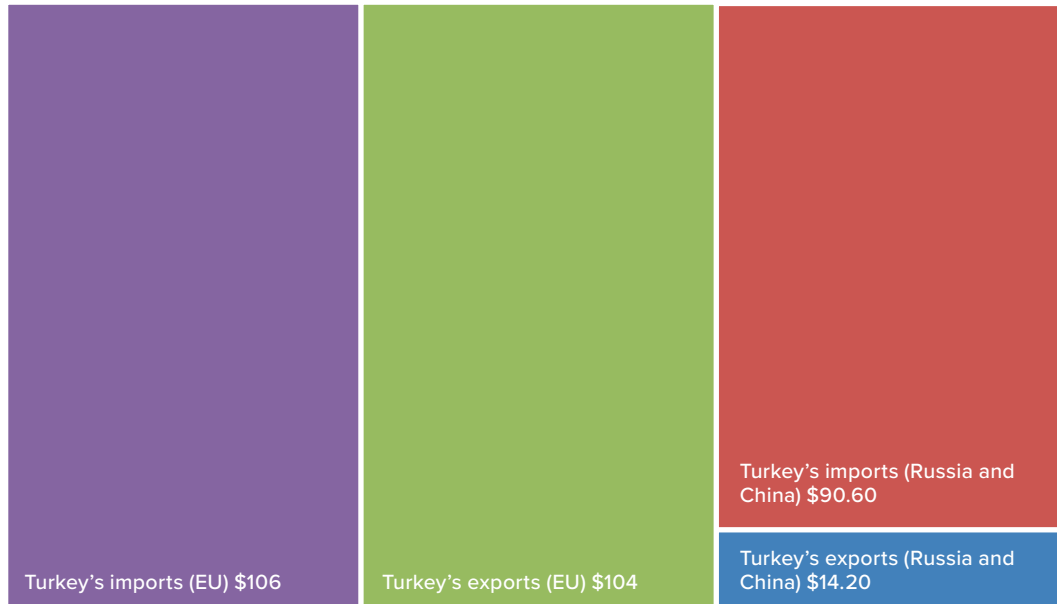
a significant trade surplus (figure 2). Israel's share in Turkey's total exports also increased in the same period. Concurrently, diplomatic relations were extremely tense, especially in the wake of the Israeli wars against Hamas and, above all, following the Mavi Marmara 2010 incident where Israeli commandos killed 9 Turkish citizens and wounded 55 others as they seized a ship of activists seeking to break the maritime siege on the Gaza Strip in international waters.²⁶ The incident ushered in a long period of diplomatic discord, yet economic ties continued to flourish.

Trade and investments constitute a complex domain that requires managing multiple dependencies for Turkey in its quest for strategic autonomy. The economic repercussion of Turkey's diplomatic challenges in the 2010s is a case in point. The deteriorating ties with the West undermined Turkey's foreign investment potential, as the West (the EU and US) are still

the leading supplier of inward foreign direct investment. Despite joining the Belt Road Initiative with high hopes, Turkey has not attracted significant foreign investments from China. According to the Central Bank of the Republic of Turkey data, as of 2022, China's total investment stock in Turkey reached 8.6 billion dollars, a tiny amount compared to Western countries. According to the Economist Intelligence Unit report, Turkey ranks 72nd as an investment destination for Chinese investors. The report states that Turkey "has lost its allure for Chinese investors because of an unpredictable foreign and economic policy landscape."²⁷ On the commercial side, Turkey's trade volume with the Russia-China axis skyrocketed in the 2010s. However, the growing trade ties mostly favoured these countries, leaving Turkey with a massive trade deficit (figure 3).



Figure 3. Turkey's trade volume with the EU and Russia-China (in billion \$, 2023)



Source: Authors' figure based on TUIK data

A major challenge concerning Turkey's quest for strategic autonomy emerged with Turkey's potential exclusion from key connectivity projects being developed by rival great powers vying for influence in the context of the emerging multipolar economic order. China launched the Belt Road Initiative in 2013 to connect more than 150 countries through trade and large-scale investment initiatives. In response, the United States and the EU initiated the Transatlantic Trade and Investment Partnership to create the largest "single market" in the global economy. However, after Donald Trump became President in 2016, negotiations terminated without any conclusion. In 2019, the EU concluded, "The negotiating directives for the Transatlantic Trade and Investment Partnership must be considered obsolete and no longer relevant."²⁸ The Biden administration later spearheaded the India-Middle East-Europe Economic Corridor (IMEC) in 2023, linking Asia, the Persian Gulf,

and Europe. The participating countries signed a memorandum of understanding in New Delhi at the G20 summit, yet the initiative has been put on hold by the eruption of the Israel-Hamas war and its global reverberations.

Turkey has a competitive edge in key connectivity projects for three reasons. First, Turkey is closely embedded in the European supply chains thanks to decades-long trade and investment partnerships with the West. As "friend-shoring" or "de-risking" has replaced the emphasis on economic efficiency because of the growing geoeconomic competition, the US and the EU started to search for reliable partners to restructure supply chains and redirect investments in strategic sectors. Second, Turkey's geopolitical position enables the country to be a "connectivity hub," linking Europe, Asia, the Middle East, and the Caucasus through maritime and land routes. Third, the Turkish government



has significantly invested in infrastructure projects through public-private partnerships. For example, “Between 2011 and 2022, the government completed projects that included more than \$45 billion for airports, \$44 billion for electricity, and almost \$23 billion for roads.”²⁹ The renewed transport infrastructure and the “geopolitical dividend” make Turkey a potentially attractive destination or transit route for mega connectivity projects linking Europe and Asia.

However, Turkey could not so far seem to exploit these opportunities presented by growing multipolarity. As stated above, Chinese investments in Turkey remained low despite Ankara expressing interest in the Belt Road Initiative and trying to sync this initiative with the Middle Corridor project. European investments in Turkey also did not increase in the 2010s—even the opposite is the case since the volume and quality of inward foreign investment declined over the last decade. Also, Turkey was not invited to the IMEC project in 2023. Turkey’s exclusion from this new initiative, which includes India, Israel, Saudi Arabia, Greece, and Europe, prompted President Erdoğan’s criticism. The Turkish president claimed, “We say that there is no corridor without Turkey... Turkey is an important production and trade base. The most convenient line for traffic from east to west has to pass through Turkey.”³⁰ The Turkish government, instead, promoted the Iraq Development Road Project, which aims to link the Gulf region and Turkey with railways, highways, and ports, passing through the United Arab Emirates, Qatar, and Iraq. Turkey also promotes the opening of the Zangezur corridor, which is a transportation route that connects Azerbaijan and Turkey through Armenia’s border with Iran, via Nakhchivan. The Turkish government places high importance on the Zangezur corridor also because the railways and roads to be constructed as part

of the project will link Turkey with Central Asia, Russia, and China via Azerbaijan.³¹

The intense competition in the trade and investment domain suggests multipolarity also produces significant risks. It is true that governments are not the only actors in those projects and economic feasibility constitutes the primary parameter for the sustainability of vast connectivity projects. Yet, it is worth noting that these projects also materialise within a geopolitical framework, requiring delicate diplomacy and statecraft. Given that the most secure way to build strategic autonomy in a multipolar world is through connectivity, the risk of being left out in mega initiatives driven by geopolitical calculations requires a long-term strategic outlook. Energy is one such domain, which is the subject of the next section.

Energy

As a country poor in natural resources, energy imports make up a significant amount of Turkey’s foreign trade deficits. Turkey is dependent on external sources for almost $\frac{3}{4}$ of its energy needs.³² With the Turkish economy expanding significantly over the last two decades, the country “has the fastest growing energy demand among the Organisation for Economic Co-operation and Development (OECD) countries...”³³ Unlike other countries in the East Mediterranean basin, such as Israel, Cyprus and Egypt, Turkey has not benefited from vast gas discoveries. Thus, it has to rely on several states, including Russia, Iran, and Azerbaijan, as main suppliers of natural gas, as well as on Russia, Iraq, and Kazakhstan for its oil imports. Turkey’s dependency on energy and its geographical proximity to the major hydrocarbon producers make energy one of the central domains of its

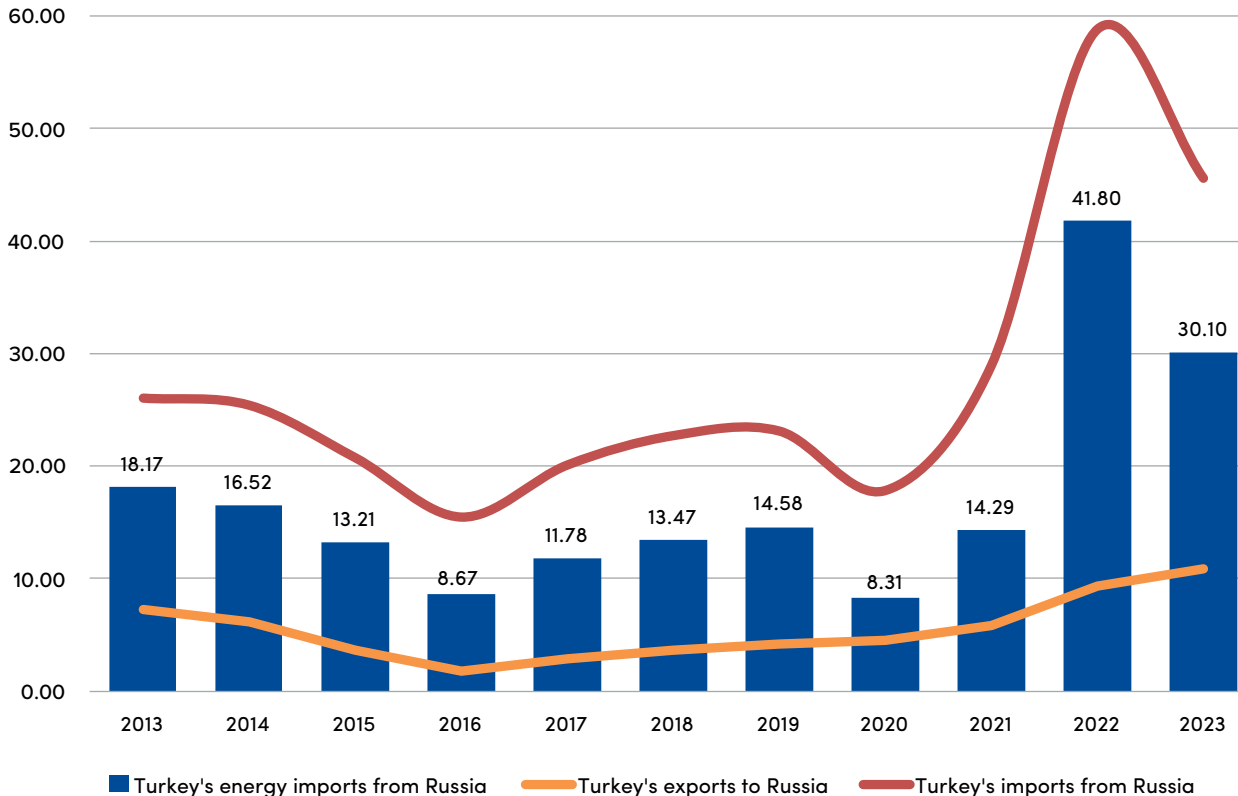


quest for strategic autonomy. In this context, Turkey, first, tries to diversify energy sources to avoid over-dependence on a single supplier; second, it aims to position the country as an energy hub, connecting different natural gas and oil pipelines.

Against this backdrop, Turkish governments have tried diversifying energy suppliers to reduce the country's exposure to the "weaponisation of energy" in the global economy. However, Russia's invasion of Ukraine has had a significant impact on Turkey's energy policies as the war has reshaped international energy flows. The war led to a considerable increase in bilateral

trade between Russia and Turkey, which sharply increased from 34.7 billion dollars in 2021 to 68 billion in 2022. The total trade volume declined to 56.5 billion dollars in 2023 — but it was still significantly higher than the pre-2022 figures. Turkey's energy imports from Russia also increased from 14 billion dollars in 2021 to 30 billion dollars in 2023 (figure 4). Hence, the main driver of the growing bilateral trade between Ankara and Moscow has been Turkey's energy imports from Russia, leading to significant trade deficits. Russia has also built Turkey's first nuclear power plant, the Akkuyu nuclear power plant, in the country's southern coastal province, which was completed in 2023.

Figure 4. Turkey-Russia trade volume (billion \$)



Source: Authors' figure based on TUIK data



At the same time, Turkey aims to position itself as an energy hub. Turkish governments have long pursued active diplomacy to participate in different projects connecting the Middle East, Eurasia, and Europe through the Turkish soil and maritime boundaries. Both oil pipelines (Kirkuk-Yumurtalık Crude Oil Pipeline and Baku-Tbilisi-Ceyhan Crude Oil Pipeline) and natural gas pipelines (such as Iran-Turkey, TANAP, TurkStream, and Blue Stream) link Turkey with its neighbours in the East and West. In recent years, the oscillations in Turkish foreign policy created certain challenges to achieving this aim. One striking example is Turkey's exclusion from an emerging energy forum and cooperation in the Eastern Mediterranean, which emerged in conjunction with Israel's gas discoveries in the region. In 2010, Israel discovered relatively large hydrocarbon reserves named Leviathan and Tamar. In 2015, another considerable reserve, Zohr, was found close to Egypt's coast. Cyprus also discovered new gas resources. With the new explorations, "together Egypt, Israel and Cyprus have 2.3tcm of gas."³⁴ In response, amid a set of complicated maritime disputes between Greece and Turkey over the territorial waters, the Exclusive Economic Zones, and the status of several islands, Turkey also started the exploration of new gas resources in the Eastern Mediterranean. Meanwhile, the economic potential in the eastern Mediterranean prompted Israel to cultivate closer ties with regional actors to produce and transfer the Eastern Mediterranean natural gas to the European markets. In 2020, Israel, Greece, Egypt, Cyprus, Jordan, Italy and the Palestine Authority formally established the East Mediterranean Gas Forum (EMGF) to coordinate the production and transfer of natural gas in the region. Exclusion from the Forum and the joint military exercises in the region, including Cyprus, Greece, Italy, Israel, Egypt, and France, exacerbated Turkey's security

concerns. Turkey was also positioned on opposite sides with the United Arab Emirates, France, and Egypt in the Libyan conflict in 2020 (table 1).

Table 1. Turkey's diplomatic encirclement in the Eastern Mediterranean

EMGF members: Jordan, Egypt, Palestine, Cyprus, Greece, Italy, Israel

Libya conflict —countries competing with Turkey: United Arab Emirates, France, Egypt

Joint military exercises in East Mediterranean: Cyprus, Greece, Italy, Israel, Egypt, France

Source: The Economist, see footnote 34.

In a multipolar world, diplomatic encirclement is neither desirable nor affordable. That was also the case for Turkey, as head-on clashes with multiple actors overstretched its resources and undermined economic performance. As a result, since 2021, the government has embarked on a new diplomatic process to mend ties with neighbours, including Israel (until the outbreak of the 2023 Israel-Hamas war), the United Arab Emirates, Saudi Arabia, and Greece. President Erdoğan also paid an official visit to Egypt in February 2024, which marked a critical juncture in the bilateral relations since the two leaders met for the first time since the military coup in Egypt a decade ago.

From strategic autonomy to foreign policy vulnerabilities?

The past one and half decade has witnessed significant changes in the global order. The 2008 financial crisis and the security-political challenges faced by the US and its allies in the Middle East and Black Sea region heralded the rise of a multipolar world order. The global shift away from unipolarity was coupled by the political upheaval



engulfing the Middle East since the eruption of the Arab uprisings. 'Strong' Arab states fragmented in the wake of the unprecedented public mobilisation spreading from Tunisia in the west to Bahrain in the east. Consequently, new zones of influence emerged in the Middle East, including Iraq, Lebanon, Syria and Yemen, drawing Russia into the region and giving rise to a regional competition for influence involving Iran, Turkey, and Saudi Arabia. Turkey's quest for strategic autonomy, which emerged in the wake of these complex global and regional shifts, was predicated on three pillars: a transactional foreign policy approach with the West; forging flexible alliances; and expanding ties with non-Western powers, especially Russia and China. The quest for strategic autonomy, which is not only a choice but also driven by the geopolitical shift to multipolarity, was designed to increase Turkey's influence in the Middle East and Black Sea regions.

Whilst initially this foreign policy approach expanded Turkey's manoeuvring space in the Middle East and Black Sea region, it created at the same time multiple dependencies and competing pressures, which exacted a very high price. The hopes of forging a set of alliances with like-minded Islamist regimes in Egypt, Syria, and potentially Libya at the early stages of the Arab uprisings were dashed. Instead, Turkey faced multiple security threats spilling over from the civil war in Syria and experienced several diplomatic crises with states across the region and its Western partners, which remain the main external investors. The confluence of these security and diplomatic challenges exacerbated the pressures upon Turkey's already fragile and overburdened economy. In this context, Turkey's exclusion from several connectivity projects in the eastern Mediterranean basin and the adverse impact of political crises on its external trade—bar Israel

prior to the Gaza War—have a significant long-term impact on Turkey's economic prospects. Ominously for Ankara, a policy designed to achieve strategic autonomy has resulted in creating multiple vulnerabilities in an era of unpredictable flux.

Building strategic autonomy through carefully planned and long-term oriented interdependence, rather than on the basis of Turkey assuming regional leadership entailing rivalry and competition with regional powers and external dependencies, appears as a more sustainable option. For Turkey, this option would rest on three fundamental pillars. First, a proper development policy with strong institutional complementarities and an effective industrial policy. Second, an active coalition-building policy, with diplomacy/security, trade/investments, and energy dimensions complementing one another. Third, a carefully designed multi-alignment policy in the Middle East and Black Sea regions, coupled by a clear normative orientation compatible with democratic values and Turkey's material power capabilities. For this to happen, it appears that Turkey would have to relax some of its leadership ambitions in exchange for re-establishing its strategic and economic ties with its erstwhile Western backers and potential regional partners.

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Turkey's quest for strategic autonomy in an era of multipolarity

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