



Strategy Notebook 236-B

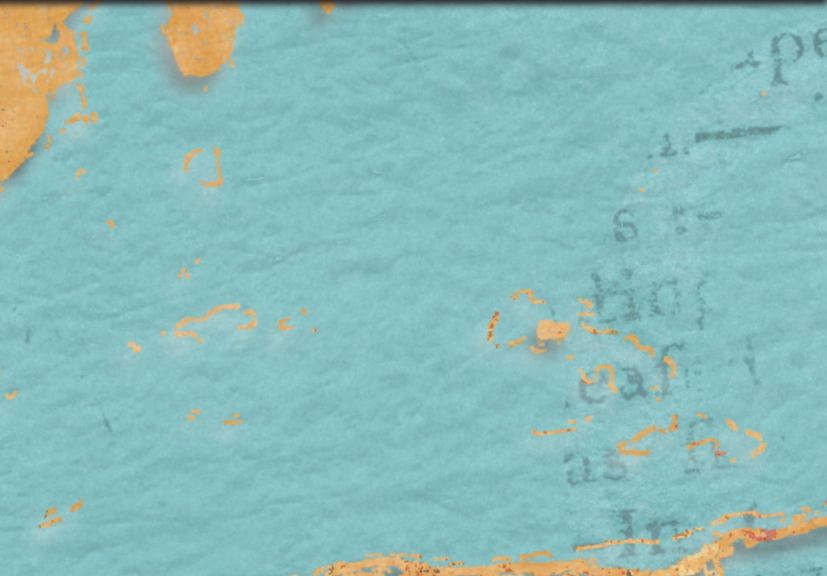
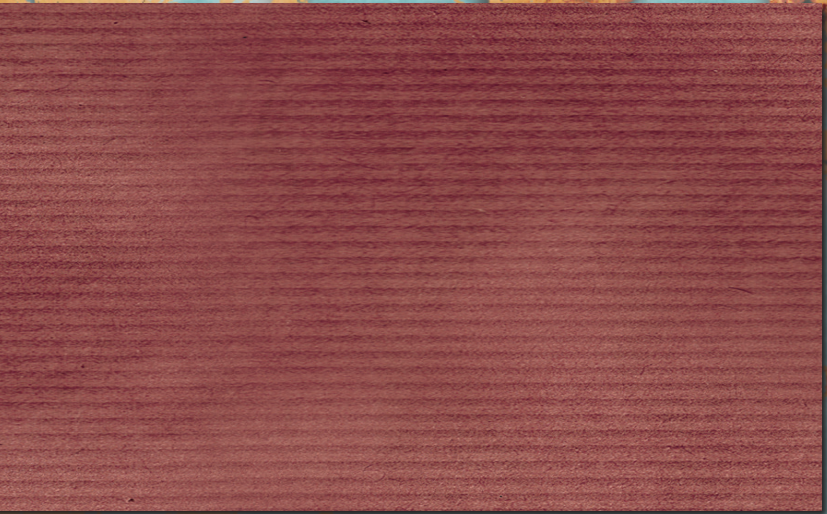
**Türkiye and its international
influence in the 21st century**

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Introduction

Jesús Gil Fuensanta

Türkiye, formerly the Republic of Türkiye, during this first quarter of the 21st century, serves as a model paradigm for explaining, within the framework of the social sciences and international relations, the transformation of a traditional state and regional power into a middle power with global aspirations.

The Turkish Republic emerged in a region that has long been a crossroads and cradle of cultures, and perhaps the best way to introduce a country whose epicentre lies in a territory of great geopolitical and geoeconomic value—and which has been the birthplace of countless civilisations—is to begin by describing its diverse territories, landscapes and climates.

The Republic of Türkiye presents itself to us as a middle power with an international geopolitical vocation. In this IEEE Analysis Notebook, we shall attempt to decipher whether all this is the result of inclination, chance, or whether it is in fact the product of very rigorous geopolitical planning.

It is for all these reasons, and because of the global geopolitical crossroads the world is currently facing following the new conflict in the Middle East, that now was the time to publish this IEEE Analysis Notebook. This notebook will examine whether Türkiye

is in fact (as many analysts suspect) a necessary player within the global order.

I imagine that everyone reading this IEEE Analysis Notebook is aware of the evocative power emanating from Istanbul, with its thousand and one minarets, bazaars and the countless relics of the Ottoman Empire among its preserved buildings.

As is the case with strategic countries, geographical location is key to understanding their position and aspirations. Geography is a reality. It is therefore advisable to take Türkiye's geographical characteristics into account in order to better understand its geo-strategy and geopolitics.

The Anatolian peninsula—a name that seems to be only a thousand years old—currently covers a large part of Türkiye's territory, with the remainder lying in south-eastern Europe (comprising part of the city of Istanbul and the region known as Thrace). Even so, its current cultural influence extends to other parts of Europe (Central and Eastern) and Asia (Central and South-West).

Istanbul, like the ancient Constantinople, has been regarded by Eastern peoples and individuals as the gateway to Europe. It has always had that European character for them.

It is us, Westerners, who have almost always equated it with an Eastern city (not least because it is situated at that end of the continent and the Mediterranean Sea). For Easterners, it will never be an Asian city in the style of Damascus, Baghdad or Isfahan itself; 'Isfahan, half the world', as was often repeated among merchants and Sogdians (the ancient name for the inhabitants of the '-stans', five former Soviet republics in the heart of Central Asia).

Today's Türkiye has gained considerable prestige among its ancestral kin in Central Asia. Far more than they achieved or aspired to just a generation ago, during the years of Francis Fukuyama's 'end of history'.

Turkish from Türkiye is, moreover, also the traditional 'dialect' of Khorezm (ancient Khwarezm) where the Amu Darya flows in Uzbekistan. In that region of Central Asia, words of 'Anatolian' Turkish origin are increasingly more common than Persian ones. The same phenomenon can also be observed in northern Iraq, where the Kurdish Regional Government (KRG) is based. Turkish is quietly becoming a *lingua franca* in the Eastern Mediterranean and further east.

Nevertheless, Russian influence is always seeking to prevail. Officials and civil servants from the Russian Federation never miss an opportunity to visit the region, using any forum or meeting as a pretext. Russian will remain the *lingua franca* for many in Central Asia, not Anatolian Turkish or Khorezmian.

Türkiye controls several geographical points of vital importance. The striking geographical contrasts that can be admired in this country, whose area is slightly more than one and a half times that of Spain, are rarely seen in other countries of the world (perhaps the United States, the People's Republic of China and Russia should feature in that small group). It possesses an inland sea, the Sea of Marmara, as well as a multitude of lakes and rivers. One of the lakes is of considerable size: Lake Van. Thus, this country separates Asia from Europe and has two major straits: the Marmara and the Bosphorus. Furthermore, it borders three of the major European seas: the Black Sea, the Mediterranean and the Aegean.

The Bosphorus connects the Sea of Marmara with the Black Sea; this is an important geographical feature not only for the northern part of the country, but also for relations with its neighbours in Eastern Europe, Asia and the Caucasus. The Bosphorus Strait divides Europe and Asia, yet allows the two to remain connected. The Strait of Marmara provides access both to the Mediterranean Sea, which washes much of its coastline, and to the Aegean Sea.

In short, Türkiye is a country with a distinctly Mediterranean character, particularly in the south, where citrus fruits and cotton cultivation predominate. In the Mediterranean and Aegean regions, the landscape and appearance are similar to those of south-western Mediterranean Europe (especially before the tourism boom of several decades ago). Proof of the lack of overdevelopment is that, in this part of the country—which comprises several provinces and hundreds of kilometres of coastline—there are only two large cities, Izmir and Adana, or cities with a population exceeding one million. In the Black Sea region, one can enjoy a landscape where the mountains are covered in forests and old Orthodox monasteries (still in use) overlook indescribable cliffs.

The great central plain is perhaps the gateway to one of the greatest clichés by which the country's landscape has been erroneously standardised. But in that steppe climate, the ancient

Turkish nomads of many centuries ago must have seen the striking resemblance to their Central Asian homeland. It is an austere area, similar to the Castilian plateau, with landscapes where houses are scarcely to be seen. To the west of the central plain, there is a pattern of countless lakes and rivers, but with no direct outlet to the sea, instead flowing through a series of parallel mountain ranges before reaching the Aegean. A similar pattern can be observed in mainland Greece, as it shares the same geological structure, with a series of scattered islands in the Aegean.

The mythical Mount Ararat—the place where legend places Noah's Ark—rises to over five thousand metres above sea level, and is the jewel of the mountain ranges that occupy most of the east of the country, a region with an alpine appearance. In this area, bitter cold reigns supreme during the winter months; even so, transport links with the rest of the country are maintained. These mountain ranges, an extension of the Elburz range running through northern Iran, end at the headwaters of the Euphrates, the eastern boundary of Anatolia. To the south of it, and stretching to the banks of the Tigris, lies a triangle that could be called the Mesopotamia of Türkiye, more fertile than is usual in the south due to its climatic conditions, which are more favourable because of rainfall.

Spain and the T. C. (Türkiye Cumhuriyeti, its official local name) share the distinction of being the two ends of the Eastern Mediterranean. They have geographical similarities (both have national territory spanning two continents: Europe and Asia for Türkiye, and Europe and Africa for Spain).

However, the history of the two nations is quite different, with very distinct historical impacts. The Kingdom of Spain fought against the Ottoman Empire in the Modern Age; it was considered 'the rival empire'. Nevertheless, there was a certain 'complicity' at various times following the First World War, and there was a steady progression in good relations from the final decades of the 20th century, gradually becoming 'natural' strategic allies in the 21st century.

On one occasion, a descendant of Sephardic Jews in Istanbul replied to me 'from the heart' (when asked why so many of his compatriots did not apply for Spanish passports or citizenship) that 'it would be a betrayal of the Turkish state that has protected them so much throughout history'.

A separate issue is how Türkiye has managed to survive amidst rampant inflation, which seems endemic. In a country where one's word and a business agreement sealed with a simple handshake hold great value, this could well have been one of the keys to its success.

In short, Türkiye's geopolitical influence reflects the enormous potential of its current territory: the place where currency was invented some 2,700 years ago, or parchment; where monotheism emerged; the site of the oldest known place of worship and monumental architecture on Earth (Göbekli Tepe); or where the very name 'Europe' originated.

Since the mid-20th century, Türkiye has become increasingly open to foreign scientific missions on its territory. These expeditions and joint projects had existed since the 1930s, but increased dramatically in the mid-1980s. Furthermore, the oldest physical artefact discovered in Spain comes from the heart of Anatolia (Gil Fuensanta and Mederos, 2023: 331–346).

The 21st century has seen a revitalisation of archaeological and museum studies and the applied sciences, with significant publicity and funding allocated to local projects. The cost of museums and hotels has risen, but the investment is substantial and has, in recent years, attracted a large influx of tourists from both the local area and 'Eastern' countries (including Eastern Europe).

In the following volume, specialists from diverse backgrounds explore, across a series of comprehensive sections, the geopolitical and geoeconomic significance of the territory of Türkiye. The publication of this IEEE Volume is also of particular importance due to the profound connections between the two countries.

Ambassador Manuel de la Cámara discusses in Chapter 1, 'Spain and Türkiye: a comprehensive partnership within the European, Mediterranean and Atlantic framework', various cultural aspects and the history of Spanish-Turkish relations.

In Chapter 2, 'The geopolitics of Türkiye: a necessary player in the new global order', analyst Ignacio Castro Torres analyses all issues relating to Türkiye from a geopolitical perspective.

University professor Manuel Gazapo Lapayese describes important security issues, such as Daesh and Salafism/Jihadism or cyberspace, in Chapter 3, 'Türkiye and its internal security: insurgency, terrorism and cyberspace'. This chapter examines in detail the issue of the 'Maoist/left-wing' Kurds in Syria, and

'their neighbours' in the PKK and similar groups, and attempts to discern whether this could lead to major future international disputes involving Türkiye, starting from the question: is this a potential 'Achilles' heel' for the Turkish Republic's future ambitions and achievements? It also introduces the term Türkiye, today, as a 'hyper' presidential republic (that is, where the president is the head of state in every respect).

In Chapter 4, 'The geopolitical discourse of the Turkish political elite's on human rights', Professor Carmen Rodríguez López examines the evolution of human rights in relation to Türkiye throughout its recent history, and their impact on geopolitics. Issues such as the so-called 'Arab Spring' or 21st-century neo-Ottomanism are also analysed in this chapter.

In Chapter 5, 'Türkiye in the Middle East', Professor Andrés de Castro offers a significant exploration of Türkiye's relationship with the Middle East and what this implies for Europe and Spain. All aspects of the Middle East in Türkiye, both past and present, are addressed within the scope of this section.

Chapter 6, 'The geoeconomics of Türkiye in Eurasia', is a study of Türkiye's geoeconomics by analysts Lucía Alberich Lanzos and Elena Gosálvez Frías. This section also highlights the importance of the energy issue in Türkiye's economic equation, not only due to its energy dependence but also because of the significant role it plays as an energy hub for Europe and the Mediterranean. This chapter also aims to examine whether Türkiye's lack of energy resources also influences its geopolitical outlook.

Chapter 7, 'Türkiye between the West and the BRICS+: strategic autonomy in a multipolar world', by Professor Marién Durán Cenit, analyses the situation of the Republic of Türkiye within the framework of the BRICS. This chapter also aims to analyse whether there might be any differences between the views of Türkiye and various NATO allies regarding issues related to its role in these different organisations, which are alternatives to those of predominantly Western origin.

Türkiye has strengthened its role in Africa since 2022, through *military alliances and arms sales* in the Sahel and other African regions. These and related issues are analysed by Professor Rafael Santiago Orti in Chapter 8, 'From Ankara to the Sahel: Türkiye strengthens its influence in Africa'. This section aims to analyse Türkiye's geopolitical actions not only in the Sahel and the Maghreb, but across the entire continent, with a view to

determining whether these actions follow a unified or diversified strategy.

Chapter 9, 'Türkiye's influence in Latin America as a vector of its global foreign policy', builds on the analysis carried out by Professor Alfredo A. Rodríguez Gómez on Türkiye's strategy towards Latin American countries.

Finally, in Chapter 10, 'Türkiye's geoeconomics in the Indo-Pacific', Professor Ángel Rodríguez García Brazales analyses Türkiye's geoeconomic relations with the Indian subcontinent, Southeast Asia and the People's Republic of China. Here, the parallel diversification strategy employed by the Turkish Republic in these geographical scenarios is examined. This section concludes the specific analyses by various analysts and specialists on particular aspects of Türkiye's global geopolitics.

A final chapter, comprising individual conclusions and those drawn from the various preceding chapters, is authored by the writer of this text.

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Gil Fuensanta, J. and Mederos Martín, A. (2023). Anatolian-style red pottery from the second half of the third millennium BC at the Late Chalcolithic settlement of Les Moreres. In: González Prats, A. and Lorrio Alvarado, A. J. (eds.). *The Chalcolithic settlement of Les Moreres (Crevillent, Alicante)*. University of Alicante, Publications Service. Pp. 331–346.

Chapter One

Spain and Türkiye: a comprehensive partnership within the European, Mediterranean and Atlantic frameworks

Manuel de la Cámara Hermoso

Abstract

This chapter reviews relations between Spain and Türkiye from a global perspective. It begins with a historical overview, focusing on the parallel rise of the Spanish and Ottoman Empires, which clashed militarily and politically, particularly during the 16th century over hegemony in the Mediterranean, normalised their relations following the Treaty of Friendship of 1782—which established diplomatic and commercial ties—and, finally, faded away under the weight of their respective empires and the rise of other rival powers.

Spain and Türkiye also followed parallel paths in the 20th century in their approach to Europe as a route to modernisation, although Spain achieved accession in 1986 and Türkiye has been unable to make progress in its negotiations for various reasons, chiefly the Cyprus conflict and problems in meeting the accession criteria.

Today, bilateral relations between the two countries are very close across all areas, as they are both European, Mediterranean and Atlantic nations. Economic and trade exchanges are particularly significant, currently standing at nearly EUR 20 billion annually, with both governments having set a target of reaching

EUR 25 billion by 2030. Türkiye is one of the few countries outside the European Union with which Spain holds biannual inter-governmental summits. The Alliance of Civilisations, promoted by both countries, symbolises their mutual commitment to peace and understanding in the face of the so-called 'Clash of Civilisations' and lends a 'comprehensive' character to Spanish-Turkish relations.

Keywords

Empires, Mediterranean, Europe, Alliance and Friendship.

Introduction

Relations between Spain and Türkiye—hereinafter Türkiye, in accordance with its official name at the United Nations and other international organisations—constitute one of the most comprehensive, deep-rooted and well-established bilateral ties between two countries that share a history and interests within the same strategic environment. Situated at the western and eastern ends of the Mediterranean, both nations were major empires in the past, serving as a crossroads between diverse geographical areas and a melting pot of various cultures and civilisations. Türkiye and Spain have historically played a significant role in shaping security, trade and dialogue between Europe, North Africa and the Middle East.

This paper aims to analyse this relationship from a comprehensive perspective, highlighting the multiple dimensions of Spanish-Turkish relations. Firstly, it examines the historical legacy that has shaped mutual perceptions and early diplomatic contacts, as well as the progressive convergence of both countries towards contemporary European and international frameworks. Next, the main areas of cooperation are addressed: political dialogue, economic and trade relations, collaboration on defence and security, as well as cultural exchanges and jointly promoted initiatives, in particular the Alliance of Civilisations, co-sponsored by both countries. It symbolises the desire to build bridges in a global context marked by strategic competition, polarisation and fragmentation.

From this perspective, this paper aims to show how Spain and Türkiye, despite differences in their political and institutional environments, have managed to build a very stable and pragmatic partnership based on converging interests and shared aspirations.

1 Spanish-Turkish relations from a historical perspective

Spain and Türkiye were empires that emerged almost simultaneously in the Mediterranean, but in both cases with a universal vocation. As Professor Paulino Toledo has written, it is necessary to highlight the historical and political parallels in the foundation, development, heyday and decline of the two empires situated at the two extremes of Europe and the Mediterranean, shaping world history throughout the 16th century (Paulino Toledo, 2003: 33).

The Ottoman Turks established their empire primarily following the conquest of Constantinople in 1453, bringing an end to the Byzantine Empire, heir to the Roman Empire¹. In the decades that followed, the Ottomans expanded across the Balkans, the Mediterranean and the Middle East. During the reign of Selim I (1512–1520) they conquered Egypt and, from that point on, the 'Caliphate' passed from the Abbasids to the Ottoman dynasty. During the reign of Suleiman the Magnificent (1520–1566), the empire reached its zenith, extending as far as Crimea in the north, Yemen and Sudan in the south, the Caspian Sea in the east, and as far as the gates of Vienna, North Africa and the Spanish coasts in the west, dominating the Mediterranean.

In the case of Spain, the starting point was the unification of the peninsula with the conquest of Granada by the Catholic Monarchs², subsequently spreading rapidly across the American continent following the discovery and also, to some extent, into Africa and Asia. Under the Habsburg dynasty, the Spanish Crown embarked on an expansionist policy in the Italian peninsula and an interventionist one in Flanders for religious reasons

In both cases, the main driving force behind the process of conquest was religion. As Professor John Elliott has pointed out, every empire needs its ideology, the idea of a higher mission. In the Ottoman case, the idea of global hegemony was linked to the concept of Jihad—holy war—and to the omnipotent and theocratic nature of the sultan, the absolute holder of power and sovereign in the name of God (Paulino Toledo, 2003: 20). The Spanish empire's process of conquest was also underpinned by the desire to spread the Catholic faith to all newly conquered territories, particularly in the Indies, and in the struggle against two rival religious movements: Islam in the Mediterranean and the Protestant Reformation in Europe. The Spanish Crown and the country's ruling class found in their obligations to the faith the justification for their mission (Elliott, 2007: 29).

Both empires achieved hegemony almost simultaneously. The Spanish Crown's expansionist activities on the Italian peninsula

¹ Mehmet II 'the Conqueror' of the capital of the Caesars regarded himself as the legitimate successor to the Roman emperors.

² The conquest of Granada was regarded by the Catholic Monarchs as the first step towards establishing the 'Universitas Christiana', and Charles V dreamed of creating a universal monarchy under Spanish rule, putting an end to wars between Christians. Charles considered himself the heir to Charlemagne and the Holy Roman Empire.

clashed with the interests of France and Venice, which went so far as to form an alliance with the Ottoman Sultan against Spain. The Franco-Ottoman Treaty of Friendship of February 1536 sealed the alliance between the House of Valois and the House of Osman against the Habsburgs, leading to all-out war in the Mediterranean. Steven Runciman highlights how the deeply Christian King of France, betraying the mission undertaken by his country during the great era of the Crusades, chose to ally himself with the Ottoman Sultan against the Holy Roman Empire (Runciman, 1997: 270).

This conflict reached its peak between 1560 and 1574, during the reigns of Selim II and Murad III in Türkiye and of Charles I and Philip II in Spain. The key events took place in 1560, with the Spanish disaster at Gelves (Djerba); in 1565 with the failed Ottoman attack on Malta; in 1571, with the naval battle in the waters off Lepanto³; and in 1573–1574 with Spain's conquest of Tunis, later recaptured by the Sublime Porte. As Professor Emilio Sola has explained, Naples, Sicily, Malta and Tunis became, at that time, the Mediterranean frontier—essentially a Habsburg-Ottoman border—but one marked by conflict between the Spanish, Italians and Austrians on one side, and the French, Venetians and Turkish-Berbers on the other. Cervantes reflected this historical moment in his comedy *La Gran Sultana*, which may have inspired Mozart's opera *The Abduction from the Seraglio*.

In fact, historians draw an indirect link between the conquest of Constantinople in 1453, the subsequent rise of the Ottoman Empire, and the naval expansion of Spain and Portugal, which led to the discovery of and transmission of European culture to the Americas. The capture of Constantinople by Sultan Mehmed II meant total Ottoman control of the Bosphorus Strait and the Black Sea. This disrupted the traditional flow of the Silk Road, which connected Europe with China and India via Genoese and Venetian intermediaries. The Ottomans imposed high tariffs or directly blocked the passage of Christian merchants (with the partial exception of the Venetians). Spices (pepper, cloves, cinnamon), essential for preserving food and as a status symbol, saw their prices multiply in Europe.

³ In 1571, the coalition of the Papacy, Venice and Spain, known as the Holy League, achieved a resounding military victory at the Battle of Lepanto, which was more effective for propaganda than for strategy. Mutual mistrust and rivalries among the members of the League meant that, within a year, the Ottomans had rebuilt their fleet and reoccupied Tunis.

The blockade in the Eastern Mediterranean triggered a paradigm shift: if one could not reach the East by land, one had to reach the East via the West (Spain) or by circumnavigating Africa (Portugal). Christopher Columbus's journals and letters constantly mention his aim of reaching the 'Indies' to obtain spices and gold. His proposal to the Catholic Monarchs was based on the premise that the overland route was closed. The Treaty of Alcaçobas (1479) and subsequently the Treaty of Tordesillas (1494) demonstrate the urgency of the Iberian crowns to divide up the ocean in their race to reach Asia to obtain the coveted spices, always avoiding areas controlled by the Turks (Tamames, 2021: 45–51).



Figure 1. Naval Battle of Lepanto. Source: Wikipedia

The war against the Ottoman Empire led to the development in Spain, between 1453 and 1782, of a negative image of the Turks, centred on the difficult living conditions of Christians in the East, but in a sense aimed at raising funds to ransom captives and ensure a Spanish presence in the custody of the Holy Places, then under Ottoman rule.

'Tied to the hard bench
of a Turkish galley
both hands on the oar
and both eyes on the land
a captive of Dragut
on the beach at Marbella
he complained to the hoarse sound
of the oar and the chain'

Luis de Góngora y Argote⁴

One exception was the description of the Turks in the anonymous work *Journey to Türkiye* from the mid-16th century, which reveals the admiration aroused by the splendour of the Ottoman court and the strength of the 'Grand Turk' (Martín Corrales, 2003: 254): 'Strong as a Turk', went a popular saying in Castile, and in Catalonia, when referring to the harsh month of February, they would say: 'Febrer curt, mas breu que un turc' (February short, but fiercer than a Turk). A strength that endures to this day, as the Turkish people are characterised, among other things, by their resilience and ability to overcome the harshest adversities.

With the increase in trade and the accession of Charles III to the throne in 1759, the Treaty of Peace and Commerce was signed on 14 September 1782⁵ with the Ottoman Sultan Abdülhamid I, leading to the exchange of diplomatic missions headed by Juan de Bouligny on the Spanish side and Vasif Efendi on the Turkish side⁶. The King of Spain's aim was to establish a counterbalance in the Eastern Mediterranean to British, Austrian and Russian ambitions and to secure Ottoman support against the Barbary Regencies in North Africa, whose corsairs frequently raided the Spanish Levant coast, hampering fishing and trade and wreaking havoc on coastal towns. The Treaty of 1789 remained in force during the governments led by Floridablanca, the Count of Aranda and Manuel Godoy, and ensured that, during the War of Independence, Spain did not have to worry about its southern front, allowing it to concentrate its forces against the French invaders.

⁴ Cuadernos del Bósforo I. *Op. cit.*

⁵ During his reign in Naples, Charles III had signed a Treaty of Peace and Trade with the Sublime Porte in 1740, the clauses of which served as a model for the treaty with Spain almost four decades later.

⁶ Vasif Efendi, a distinguished diplomat of the Sublime Porte, left behind an interesting account of his mission to Spain (*Sefaratname*).

During this period, an interesting body of Spanish travel literature on the Ottoman Empire emerged, marking a transition: the view of the 'Turk' as the great enemy of Christendom gave way to a more scientific, diplomatic and pragmatic perspective, characteristic of the Enlightenment. Among the best-known works is José Moreno's *Viaje a Constantinopla* (1790). Moreno was the chaplain of the diplomatic expedition led by Gabriel de Aristizábal. Writing in a highly Enlightenment-style, Moreno sought to debunk misconceptions and offer an objective view of the 'other'. *Viaje a Constantinopla* was directly part of the political strategy of the Count of Floridablanca (First Secretary of State and of the Cabinet, the equivalent of Prime Minister) to justify Spain's diplomatic shift towards the Ottoman Empire⁷.

At that time, direct trade was established between the two powers, with Spain showing great interest in products such as grain, leather, spices and cotton fabrics, and the Ottoman Empire, above all, in wool and silver. Diplomatic representation in Istanbul was consolidated and consular relations were also established.

Following the Napoleonic Wars, Spain and Türkiye resumed their political and commercial contacts. In 1827, an agreement was signed between the two countries opening the way for Spanish merchant ships to the Black Sea. In 1840, a commercial treaty was signed whereby both countries granted each other most-favoured-nation status, following the model of the Anglo-Turkish treaty of 1838 (Martín Corrales, 2003: 260).

Throughout the 19th century, the Spanish press followed with interest the events in the Ottoman Empire, which was threatened with disintegration, as had previously occurred in Spain. Spanish liberals paid close attention to the reforms introduced following the 'Gülhane Hatt-i-Sharifi' edict of 3 November 1839 (reforms known as the 'Tanzimat'), which established respect for fundamental rights (life, honour, property), an orderly tax system, compulsory military service and equality among all subjects, regardless of their religion. Subsequently, the French model was

⁷ Floridablanca was a staunch advocate of Enlightenment pragmatism. His obsession was not religion, but the security of trade and the Spanish coasts. It was he who realised that it was cheaper to sign a peace treaty with the Sultan than to maintain a permanent war fleet in the Mediterranean to fight the Barbary pirates (who enjoyed Ottoman support). The *Viaje a Constantinopla* became a diplomatic handbook for relations with the Sublime Porte.

adopted in the Commercial Code (1850), the Penal Code (1858) and the Civil Code (1876), which were sought to be harmonised with Sharia law, culminating in the Constitution of 1870 (suspended during the authoritarian reign of Abdul Hamid II).

With the Crimean War of 1853–1856, and subsequently the Russo-Turkish War of 1877–1878, the so-called 'Eastern Question' took on enormous significance in the international system, with the great powers (Great Britain, Russia, France and the Austro-Hungarian Empire) exerting considerable territorial and political pressure on the Ottoman Empire. In general, the Spanish press portrayed the Ottoman Empire as a victim of aggression by the major European powers, which promoted nationalist forces and decided to intervene openly in the internal affairs of the Ottoman Empire following the Congress of Berlin in 1878⁸. In 1908, King Edward VII and Tsar Nicholas II decided to bring about a final resolution to the so-called 'Eastern Question' through the dismemberment of the Ottoman Empire. The reaction was the 'Young Turks' revolution of 1908 (which restored the 1870 Constitution)⁹, followed by the Balkan Wars of 1912–1913, in which the Empire lost almost all its possessions in Europe. The alliance with Germany and the miscalculations of the 'Young Turks' government brought about the Empire's definitive end following the First World War.

The two Empires—the Ottoman and the Spanish—which had been born and grown at similar times, also died almost simultaneously, the Spanish one slightly earlier (Cuba, 1898 following the war with the United States and the proclamation of the Republic of Cuba in 1902), and the Turkish one, alongside the Russian, German and Austro-Hungarian empires, in the graveyard of empires that was the First World War (Martin Asuero, 2003: 286). Both the Spaniards of the Meseta and the Turks of Anatolia served to provide soldiers for the imperial armies and resources that were never reinvested in their own territories. Consequently, the two peninsulas—the Iberian and Anatolian—suffered from centuries of backwardness and isolation from the major political and industrial movements of the rest of Europe.

⁸ At this time, some Catalan nationalist movements such as the 'Renaixença' compared the decline of the Ottoman Empire with that of Spain, clearly coming out in favour of independence for the nations within that empire.

⁹ The 'Young Turks' were nationalists who came from the middle ranks of the army and the bureaucracy and had formed in Paris in 1885 the so-called 'Committee of Union and Progress' —CUP— (*İttihat ve Terakki Cemiyeti*).

The Treaty of Sèvres of 1920 left the Ottoman Empire reduced to a small state situated in the centre of Anatolia, with Istanbul as its capital (though occupied). The reaction of the Turkish Army led by Mustafa Kemal Pasha following his landing in Samsun in 1919 succeeded in expelling the occupying forces. Mustafa Kemal became 'Halaskar Gazi' (Saviour and Conqueror). On 24 July 1923, the Treaty of Lausanne was signed, restoring sovereignty to Türkiye, whose territory included the entire Anatolian peninsula and Eastern Thrace, which is the territory that exists today. On 29 October 1923, the Republic of Türkiye was proclaimed, with Mustafa Kemal as its first president and İsmet İnönü as prime minister (who served as president of the Republic between 1938 and 1950).

Relations between Spain and Türkiye during this period were cordial, but low-key. The pre-existing formal diplomatic relations between the Empire and Spain continued. The Spanish legation (formerly an embassy) had been established in Istanbul for a long time, and the Turkish legation in Madrid since 1857. During this period, diplomatic missions remained at the level of Legation (a rank lower than that of Embassy)¹⁰ and were not formally elevated to the level of embassy until 1951, a year after İnönü left the presidency¹¹.

During this period, Spanish-Turkish relations were not particularly close, as both countries were focused on their internal developments: Mustafa Kemal's Türkiye was undergoing the Kemalist revolution (secularisation and modernisation), whilst Spain was in a turbulent period marked by the end of the monarchical Restoration, the dictatorship of Primo de Rivera, the Second Republic, the Civil War and the first decade of Franco's dictatorship, characterised by international isolation and autarky. It was only during the Regeneracionist period of Primo de Rivera's dictatorship (1923–1930) that both countries shared an agenda of modernisation and reform. On 27 September 1924, a Treaty of Friendship was signed between the Republic of Türkiye and the Kingdom of Spain.

¹⁰ Notable during this period was the presence of the writer and poet Yahya Kemal, who was in charge of the Turkish legation in Madrid between 1929 and 1932. The writer went on to forge a close friendship with King Alfonso XIII and left an excellent account of Spain at that time in the form of letters in his *Letters and Articles* [see Necati Kutlu (2010: 347–356)].

¹¹ The first Spanish ambassador to the Republic of Türkiye was Alfonso Fiskowitch, who until then had been Minister Plenipotentiary in charge of the Spanish Legation in Ankara.

Türkiye, under Atatürk¹² and later İnönü, maintained a policy of neutrality during the Spanish Civil War (though there was no shortage of pressure from the Soviet Union on the one hand, and from Germany and Italy on the other), although the Turkish press and public opinion were divided in their sympathies. During the Second World War (1939–1945), both Franco's Spain and İnönü's Türkiye remained neutral (in the case of Spain, later 'non-belligerent'; in the case of Türkiye, through 'active neutrality'); although there were inclinations and strong pressure from the Axis powers and the Allies¹³. Türkiye declared war on Germany and Japan on 23 February 1945, three months before the end of hostilities, and so this was purely symbolic in nature¹⁴.



Figure 2. Mustafa Kemal Atatürk.

This policy of non-alignment in military matters, aimed at preserving internal stability and avoiding involvement in another armed conflict following the devastation suffered by Türkiye in the First World War and by Spain in the Civil War, served as a point of parallelism in their foreign policies. Spain's neutrality prevented the forces of the Reich from seizing Gibraltar and the strait of the same name. In the case of Türkiye, this was achieved through strict control of the Straits (the Bosphorus and the Dardanelles)

¹² Mustafa Kemal adopted the name 'Atatürk', emerging as the 'father' of the Turkish nation, its saviour and teacher. As he died without issue (he had only adopted children), no one else bore his name.

¹³ Spanish-Turkish relations during the Second World War 1939–1945 as reflected in the documents. Salinas (2011).

¹⁴ The reason for this declaration of war on the Axis was strategic: Ankara sought the aid of the Western powers in the face of pressure from the Soviet Union, which demanded the return of the provinces of Kars and Ardahan and, above all, the revision of the Montreux Convention regarding the Turkish Straits. The declaration of war also facilitated Türkiye's participation in the San Francisco Conference, in accordance with the conditions established at the Yalta Conference.

in accordance with the 1936 Montreux Convention, which was of great strategic importance.

From an ideological standpoint, Atatürk's Türkiye and Franco's Spain were quite different. Kemalism was defined by six principles: republicanism, secularism, nationalism, populism, statism, and reformism¹⁵. Both regimes were founded on a strong nationalism, which was highly intransigent towards internal separatist movements: the Kurds in Türkiye, and Basque and Catalan nationalisms in the case of Spain. However, the Turkish state was a secular state¹⁶, whereas the Spanish state during Franco's dictatorship was a Catholic confessional state. In both cases, the starting point was a strong state, highly interventionist in the economy, yet a driving force for reform: in the case of Spain, from the 1959 Stabilisation Plan onwards, in the case of Türkiye with the modernisation programme driven by Atatürk, involving institutional and legal reforms (based on the Swiss Civil Code, the Italian Penal Code and the French Commercial Code), and reforms to the legal system in general, including the abolition of religious courts, the unification of the judiciary into a single state network, and the replacement of Sharia law with 'European-style' positive law.

During this period, a Cultural Agreement was signed in 1956 and a Treaty of Friendship between the two countries in 1959. The Ministers of Foreign Affairs Alberto Martín Artajo, Fernando María Castiella and Gregorio López Bravo visited Türkiye in 1956, 1964 and 1972, respectively. The Turkish Foreign Ministers Fatin Zorlu, Feridun Cemal Erkim and Osman Olcay did the same in 1959, 1964 and 1971 (Rodríguez López, 2010)¹⁷.

2 Spain and Türkiye rapprochement' with Europe

Both Spain and Türkiye—two countries which, as we have seen, played a leading role in European history during the 15th to 19th

¹⁵ These six principles, symbolised in the emblem of the party founded by Atatürk (the Six Arrows-*Altı Ok*), were incorporated into the 1937 Constitution and formed the basis of the ideology of 'Kemalism'.

¹⁶ Islam ceased to be the state religion under the 1928 Constitution. Sharia law was abolished with the enactment of the Civil and Criminal Codes. Education was fully secularised by the Law of March 1924; Koranic schools or 'medersas' were abolished and replaced by schools for preachers or 'imam hatips' and a Faculty of Theology in Istanbul. The state took control of religion in the face of Islamist parties.

¹⁷ See the excellent work by Carmen Rodríguez López (2010).

centuries—identified the idea of Europe with that of a process of economic, social and political modernisation and the natural path out of their isolation.

Türkiye's European aspirations are rooted in Atatürk's modernising revolution. Kemalism associated 'modernisation' with Westernisation: science, rationality, secularism and the nation-state, which were identified with contemporary Europe, which Türkiye had to 'catch up with' in order to overcome Ottoman backwardness. For Atatürk, modernisation meant participation in a universal civilisation, in a conception similar to that of the 18th-century Enlightenment thinkers, regardless of religion and the divisions it caused.

From the 1960s onwards, Turkish leaders spoke of rapprochement with the European Communities (EC) as a 'return' to a space to which Türkiye had always belonged geopolitically and culturally. The narrative of the 'return to Europe' was also used to legitimise secular and centralising reforms, presenting them as necessary to avoid being left out of 'Western civilisation'.

In Spain, in the late nineteenth and first half of the twentieth centuries, various Spanish intellectuals, viewing the history of Spain through a pessimistic lens, interpreted integration into Europe as the necessary path to overcoming the country's structural backwardness. Figures such as Joaquín Costa denounced the system of local political bosses, rural poverty and the lack of administrative modernisation, proposing the need to 'Europeanise' Spain by adopting the educational, scientific and economic methods typical of advanced nations. Later, Ortega y Gasset famously stated that 'Spain was the problem and Europe the solution', arguing that Spain's true deficit was cultural and moral, far removed from European rationality and intellectual vitality. Both the Regenerationists and the Generation of '98 shared—albeit with different nuances—the idea that only by opening up to Europe—understood as political, scientific and civic modernity—would it be possible to raise Spain to the level of contemporary societies.

However, it was not Europe, but the United States that contributed most to bringing Türkiye and Spain out of their isolation and facilitating their integration into the West. In the case of Türkiye, which participated in the San Francisco Conference (April–June 1945), it was able to sign the United Nations Charter, which came into force in October of that same year. With the formulation of

the Truman Doctrine at the dawn of the Cold War in 1947, Türkiye received significant economic assistance through the Marshall Plan in 1948 and joined the Organisation for European Economic Cooperation (OEEC, later the OECD) that same year. In August 1949, it joined the Council of Europe and NATO in 1952.

In the case of Spain, following the international isolation of the 1940s, the pacts with the United States and the Concordat with the Holy See in 1953 enabled the Franco regime to open up to the outside world. In 1953, Spain joined UNESCO; in 1955, it was admitted as a full member of the United Nations; and from then on, it gradually integrated into the main multilateral organisations: in July 1958, the IMF and the World Bank; in July 1959, the OECD. It joined NATO in 1981.

Both countries have come a long way in their relationship with the EC. In the case of Spain, this began with the letter of 9 February 1962 requesting that the EC establish 'an association capable of leading to full integration...'; followed by the Preferential Agreement of 29 June 1970, which proclaimed 'the mutual willingness of the parties to proceed with the progressive removal of barriers to the bulk of trade' through a two-stage process (the first lasting six years, the second indefinite); the application for membership in July 1977; the start of negotiations in February 1979; the signing of the Treaty of Accession on 12 June 1985 and full membership on 1 January 1986 (Bassols, 1995)¹⁸. Following Franco's dictatorship, joining the then EC (1986) was the definitive hallmark of democratic normality and the end of Spain's international isolation.

In the case of Türkiye, the process ran in parallel: application for association in 1959. The Ankara Agreement of 1963 (and its Additional Protocol of November 1970), which established an institutional framework for cooperation between Türkiye and the EC with a view to a future Customs Union and eventually full membership. In April 1987, the Turkish government submitted its application for full membership of the European Community (EC). On 1 January 1996, the Customs Union Agreement between Türkiye and the EU entered into force. In December 1999, the Helsinki European Council declared that: 'Türkiye could join the European Union on the basis of the same criteria as the other

¹⁸ See the excellent account of Spain's negotiations with the EC in the book *España en Europa* by Ambassador Raimundo Bassols (1995).

candidates' (the so-called 'Copenhagen Political Criteria')¹⁹. In December 2004, the European Council approved the start of accession negotiations, which began in practice in October 2005, following the adoption of a series of 'reform packages' which some analysts—somewhat exaggeratedly—dubbed 'The Third Tanzimat Period', alluding to the period of political reforms carried out between 1839 and 1871, referred to above. Within the framework of the negotiations, sixteen chapters were opened and one of them was provisionally closed.

However, progress in the negotiations has been very slow, due to Türkiye's difficulty in adopting—and, above all, implementing—the reforms demanded by the EU. In recent years, the evolution of President Recep Tayyip Erdoğan's style of governance has raised concerns about greater centralisation of power in Türkiye²⁰ and the erosion of the rule of law, particularly following the attempted coup in 2016. This has been one of the reasons for the lack of progress in the negotiations, which have been stalled since 2018.

The European Commission's Working Document accompanying the 2025 report on EU enlargement—Document SWD (2025) 756 final—notes that, in December 2024, the Council reiterated its deep concern regarding the persistent situation in the areas of democracy, the rule of law and fundamental rights, and the fact that accession negotiations with the country have stalled and the opening or closing of new chapters cannot be envisaged.

Other outstanding issues in Türkiye's EU accession process include the Cyprus conflict (Ankara's non-recognition of the Republic of Cyprus, the military occupation of the northern part, and the refusal to admit ships and aircraft flying the Cypriot flag or belonging to Cyprus to Turkish ports and airports), Türkiye's oil and gas exploration activities in the Eastern Mediterranean and

¹⁹ The then High Representative for EU Foreign Policy, Javier Solana, travelled directly from Helsinki to Ankara to explain to the then Turkish Prime Minister Bülent Ecevit the decision adopted by the European Council and to try to convince the Turkish Government of the importance of meeting the accession criteria and that Türkiye would not be discriminated against in relation to other candidates.

²⁰ See, Erdogan's new order – Engelsberg ideas. Of particular note is the imprisonment of the main opposition leader, Ekrem Imamoglu, Mayor of Istanbul, accused of alleged corruption, bribery and supposed links to terrorist groups. The Public Prosecutor's Office has sought sentences totalling many years in prison, and he has been disqualified from office following the revocation in March 2025 of his university degree awarded by Istanbul University. Fifteen mayors from the main opposition party, the CHP, have also been suspended or imprisoned, including those of major cities such as Antalya and Adana and of key districts in Istanbul.

certain aspects of its foreign policy²¹, which have caused tensions with the EU and even with its NATO allies²² (for example, it does not apply EU sanctions against Russia, despite having a Customs Union Agreement with the EU and being a candidate country).

It must also be acknowledged that Türkiye's accession is a subject of debate: the size of its population (87.7 million, more than Germany), particularly following the establishment of the double majority (of Member States and population) for decision-making in the Council of the EU under the Treaty of Lisbon, and the fact that Türkiye is a predominantly Muslim country, at a time when the debate on Europe's cultural identity and immigration is giving rise to fierce political controversy.

The Cyprus conflict constitutes a major obstacle to Türkiye's accession (Westmacott, 2021)²³. But the EU is not without responsibility, having admitted a divided state with an unresolved conflict, thereby losing its neutrality on the matter. Nicosia remains the only European capital split in two, and a third of the island is under military occupation by Turkish forces, which Ankara justifies on the basis of the 1960 Treaty of Guarantee. It should be remembered that the United Kingdom also maintains two military bases on the island under 'British sovereignty' (Akrotiri and Dhekelia) by virtue of a 1960 agreement, dating from the same period as the Treaty of Guarantee.

Keeping the Turkish Cypriots completely isolated, despite the fact that they voted overwhelmingly in favour of the Annan Plan in the 2004 referendum (65% of Turkish Cypriots voted in favour, whilst 75% of Greek Cypriots voted against) is neither fair nor morally acceptable (from the Chamber 2021)²⁴. The conflict over Cyprus is also an obstacle to Cyprus's accession to the Atlantic Alliance and to cooperation between the EU and NATO, which, given the

²¹ Türkiye has been classified (along with other countries such as India, Brazil and South Africa) among the so-called 'Global Swing States', which oscillate between aligning with the East or the West, pragmatically defending their interests. Available at: <https://www.defensa.com/opinion/impacto-mundial-falta-gobernanza-sahel>

²² Türkiye's Balancing Act: How Erdoğan Navigates Between NATO, Russia and the Gulf | Atlas Institute for International Affairs.

²³ See the excellent book by Sir Peter Westmacott (2021) describing the attempts to reach a settlement on the Cyprus conflict in 2004. In Helsinki (1999), a specific condition was added for Türkiye's accession: 'To strongly support the efforts of the UN Secretary-General to find a solution in Cyprus'.

²⁴ See Manuel de la Cámara (2021). Available at: <https://www.cidob.org/publicaciones/turkey-and-european-union-difficult-critical-relationship>

current security situation in Europe, appears to be very necessary. This directly affects the holding of formal meetings between the two organisations, the exchange of classified information and structured cooperation between the Alliance and the EU, which share twenty-two members.

The President of the European Commission, Ursula von der Leyen, has pledged to give new impetus to peace efforts in Cyprus. In a world where the law of the jungle is making a comeback and the rules-based international order is under attack, resolving a conflict that has now lasted for more than half a century would go some way towards countering the worrying drift currently evident in international relations. However, it is unlikely that this conflict will be resolved without Türkiye joining the EU. And, in turn, Türkiye's accession is not foreseeable without a prior resolution of the Cyprus conflict²⁵.

In the field of defence, the issue of Ankara's participation on an equal footing in European military operations has always been fundamental. In the now-defunct 'Western European Union' (WEU), Türkiye achieved 'Associate Member' status and participated fully in the organisation's decision-making. With the dissolution of the WEU and the development of the so-called 'Berlin Plus' agreements, Türkiye could no longer participate in decision-making as it had in the WEU, which constitutes an obstacle to cooperation between the two organisations²⁶.

Added to this is the still fragile state of the Turkish economy, despite the progress made over the last two years and the favourable outlook for the future²⁷.

Europe remains a magnet, but many Turks have become disillusioned with the accession process. Although EU membership

²⁵ When the author was ambassador in Ankara, the Turkish government demanded three elements it considered fundamental: preservation of the Treaty of Guarantee, respect for bicomunalism (two communities, Greek and Turkish, with equal rights) and bizonalism (separation of the two communities, with restrictions on the return of Greek Cypriots to the north of the island, which would have required a derogation from the *acquis communautaire*).

²⁶ Türkiye demanded, in the event of European military operations in which it participated, to have equal rights in the approval of the operational plan, in the appointment of the operation commander, and in the political control and strategic direction of the operation.

²⁷ The OECD forecasts Turkish GDP growth of 3.6% in 2025, 3.4% in 2026 and 4% in 2027. Inflation is expected to fall to 10% in 2027. See: Türkiye Economic Snapshot | OECD. Full Report: OECD Economic Surveys: Türkiye 2025 | OECD.

remains an attractive idea and most Turks still wish to travel, study, work or do business in Europe, currently only 35% strongly desire accession²⁸ and less than 20% believe that Europeans want them as partners in the EU (Hoffman, 2018). This is due both to disappointment at the paralysis of accession negotiations and to the Union's loss of appeal due to its economic and technological stagnation. In this respect, there is a difference with Spain, where public support for our EU membership remains quite high and the main political parties—PP and PSOE, above all—agree in backing the European integration process.

Despite the political deadlock, the EU remains Türkiye's main trading partner²⁹ and the two remain linked by the Customs Union Agreement, but meetings of the Association Council have been suspended, in accordance with the Council's conclusions of 2019. The Commission continues to step up cooperation with Türkiye to discuss the functioning of the Customs Union, including a High-Level Trade Dialogue held in July 2025. In the Joint Communication of November 2023, the High Representative and the Commission recommended resuming talks on the draft negotiating framework for the modernisation of the Customs Union. Talks resumed in 2025 on the understanding that Türkiye would swiftly address the non-implementation of the EU's restrictive measures against Russia and continue to resolve trade barriers efficiently. Ankara, for its part, is calling for the extension of the Customs Union Agreement to public procurement, services and agricultural products.

Spain has traditionally been one of the EU countries most in favour of Türkiye joining the European project, given its geopolitical importance, its status as a NATO ally and the fact that it is a 'southern' country with which we share common interests. With the EU's latest enlargements, the Union's centre of gravity has shifted eastwards and northwards, and a country such as Türkiye would serve to counterbalance that trend. It is believed that the EU has a fundamental interest in the political stability and prosperity of a country with a population of almost 90 million and a GDP of over EUR 1.13 trillion, whose economy ranks between 17th and 20th globally in terms of PPP. Spain has participated with

²⁸ In 2004, when the author of this chapter was Spain's ambassador to Türkiye, 75% of Turkish citizens were in favour of joining the EU.

²⁹ The EU is Türkiye's largest trading partner, and Türkiye is the fifth-largest supplier of goods and services to the EU. In 2024, total trade exceeded EUR 219 billion. Türkiye's exports to the EU amounted to EUR 98.4 billion, whilst imports from the EU totalled EUR 112 billion.

sectoral experts in programmes within the framework of pre-accession assistance to Türkiye.

Furthermore, it is believed that Türkiye can provide the Union with strategic depth due to its pivotal position between the Middle East, the Caucasus and Central Asia, the Black Sea and Europe. In several bilateral meetings, the intention has been expressed to facilitate the updating of the Customs Union Agreement and visa liberalisation. However, it is emphasised that Ankara must meet the accession criteria and seek to find a definitive solution to the conflict with Cyprus.

3 Political relations between Spain and Türkiye

Political relations between Spain and Türkiye are special, not only because of their shared history, as we have seen, but above all for geostrategic reasons. The two countries are the two NATO allies situated at the gateway to the Mediterranean: Türkiye at the eastern end with the Turkish Straits, and Spain at the western end with the Strait of Gibraltar.

Both countries are of great strategic importance. In the case of Spain, this is due to its status as one of the major countries within the European Union, its relations with North African nations, and its special historical, cultural and economic presence in Latin America. In the case of Türkiye, this is due to its position straddling Asia and Europe, with a young (approximately 43% of the population is under thirty) and well-educated population, and significant influence in key regions such as the Eastern Mediterranean, the Balkans, the Black Sea, the Middle East, the Caucasus and Central Asia. Türkiye is also a major hub for the supply of hydrocarbons to Europe from Central Asia, the Caspian Sea region and the Middle East. It has also played a significant role in the field of migration, having taken in a large number of Syrian refugees (EU-Türkiye Statement of 18 March 2016)³⁰.

Of particular importance is Spanish-Turkish dialogue and cooperation in the Southern Neighbourhood, which has suffered from enormous instability since the 'Arab Spring' of 2011, exacerbated in the last two years by the war in Gaza, the armed conflict

³⁰ Recently, the EU has included Türkiye on the list of safe countries for the return of asylum seekers. See: https://www.elconfidencial.com/mundo/2025-12-08/union-europea-paises-seguros-migrantes-asilo-1tps_4262297/ The EU agrees to implement the 'Meloni model' for the expulsion of migrants

between Israel and the so-called 'Axis of Resistance' (now greatly weakened), the military intervention by Israel and the US against Iran's nuclear facilities (June 2025) and the mass protests by the Iranian people, which have been heavily suppressed by the regime. Türkiye has been one of the allies most critical of the current military intervention by Israel and the United States against Iran. Türkiye is of particular relevance in relation to the new situation in Syria following the fall of Bashar al-Assad's regime and the seizure of power by 'Hay'at Tahrir al-Sham' (HTS, 'Organisation for the Liberation of the Levant'), a Sunni Islamist group led by Ahmad al-Sharaa ('Abu al-Jolani') which is seeking to stabilise and hold together a country with diverse ethnic and religious identities, and in which various external powers, including Türkiye itself, are attempting to intervene. The announcement in May 2025 by the 'Kurdistan Workers' Party' (PKK) of its decision to dissolve its structure and renounce armed struggle after more than four decades of insurgency against the Turkish state may be significant not only in Türkiye itself but also in neighbouring Syria³¹. In Libya, Türkiye provides military and political support to the Tripoli-based Government of National Accord (GNA), which is recognised by the UN. Türkiye is also a defence partner of Morocco, to which it exports Bayraktar TB2 drones, a sensitive issue for Spain³².

In the multilateral sphere, the Conference of the Parties to the United Nations Framework Convention on Climate Change (COP 31) will be held in Antalya (Türkiye) in November 2026, providing another forum for dialogue between Türkiye and Spain.

Relations between Spain and Türkiye are currently very good and dynamic, characterised by close cooperation in the political, economic, commercial and security spheres. This is due to the natural affinity between the two peoples, the absence of bilateral disputes and the frequent high-level political contacts that have taken

³¹ The announcement by the PKK, which has been ideologically linked to Syrian Kurdish militias, particularly the People's Protection Units (YPG) that form the core of the Syrian Democratic Forces (SDF), could reduce Turkish military operations in eastern Syria, particularly if the SDF militias are integrated into the Syrian national army, thereby preventing the fragmentation of power in north-eastern Syria, which would strengthen relations between Ankara and HTS. Unfortunately, recent events do not inspire optimism in this regard.

³² In 2021, Morocco signed a contract to purchase 13 Bayraktar TB2s for around USD 70 million and has more recently begun receiving Bayraktar Akinci drones. Bayraktar has established a subsidiary in Morocco called 'Atlas Defence' to develop, produce, maintain and support drones and UAV components locally, and also supplies control equipment and training systems for professional development in this sector.

place in recent years. Added to this is a significant development in economic relations, particularly since the Türkiye-EU Customs Union Agreement came into force in 1996. The relationship with Türkiye strengthens Spain's position in the Mediterranean region (Türkiye is a founding member of the Barcelona Process and an active member of the Union for the Mediterranean-UfM) and in Eurasia³³. Both countries promoted the founding in 2005 of the 'Alliance of Civilisations' as a United Nations initiative, with the aim of promoting dialogue between cultures and religions.

The similarity in the positions of President Recep Tayyip Erdoğan and the Spanish Prime Minister, Pedro Sánchez, on the conflict in Gaza has been a factor in bringing the two governments closer together in recent months³⁴.

Türkiye is one of the countries with which, given that the relationship is considered strategic and fundamental for Spain, so-called 'High-Level Meetings' (HLMs) are held³⁵. The HLM are usually chaired by the heads of the respective governments (the President of the Republic on the Turkish side and the Prime Minister on the Spanish side). They consist of a plenary session and sectoral meetings on various issues relevant to bilateral relations (Foreign Affairs, Economy, Defence, Home Affairs, Industry and Tourism, Ecological Transition, Transport, etc.), each chaired by the respective ministers. The agreement is to hold the HLMs every two years (the 9th HLM will be held in Türkiye in 2026).

The aim of the HLM is to review the bilateral agenda, address issues of regional and international interest, and set out a roadmap for future cooperation. The central part of the HLM is the signing of bilateral agreements (Memoranda of Understanding and Joint Declarations) in various areas. Mechanisms are established to ensure compliance with and monitoring of the agreements signed until the next HLM.

HLMs are usually preceded or accompanied by a high-level Business Forum, with the participation of business leaders and chambers of commerce from both countries. This forum is crucial for boosting trade relations, mutual investment and synergies in strategic sectors.

³³ See: www.exteriores.gob.es/documentos/fichaspais/turquia_ficha%20pais.pdf

³⁴ See a comprehensive overview of current Turkish foreign policy in Asli Ayidintasbas (2025).

³⁵ In addition to Türkiye, Spain holds such meetings with Portugal, France, Germany, Morocco, Mauritania, Italy, Poland and—more recently—with Brazil.

4 The 8th HLM

The most recent Intergovernmental Summit or HLM was held in Madrid on 13 June 2024. At this summit, a Joint Declaration was signed, building on the one signed in 2021, which established a 'Comprehensive Partnership' between the two countries. In addition, a Business Forum, a meeting on the defence industries and a Digital Technology Forum were held.

The new Joint Declaration sets the target of reaching EUR 25 billion in trade over the next five years (2030). Furthermore, it contains provisions on security and defence, the fight against crime and terrorism, migration, energy and climate change, labour, and youth and culture.

On the occasion of the HLM, seventeen Memoranda of Understanding (MoUs) and agreements were signed, notably those of an economic nature—discussed in the following section—and in other areas such as the Action Plan on Forests (combating fires and desertification); Scientific and Technological Cooperation; Cooperation between Space Agencies; Social Policy and Social Services; Employment, Vocational Training and Recognition of Qualifications in the field of maritime training.

Following the 2024 HLM, bilateral consultations have been held in various areas: Latin America (February 2025), counterterrorism (April 2025), maritime transport (April 2025), Africa (June 2025), the Balkans (July 2025) and aviation (August 2025). The Minister for Economy, Trade and Enterprise, Carlos Cuerpo, visited Türkiye in May 2025 on the occasion of the meeting of the 3rd Joint Economic and Trade Commission (JETCO). The 4th meeting is scheduled to take place in Spain this year. Consultations on maritime affairs are planned for 2026.

Contacts are also taking place at parliamentary level. In May 2025, the Chair of the Turkish Parliament's Foreign Affairs Committee, Fuat Oktay, visited Spain, accompanied by a large delegation. The delegation held meetings with the chairs of the respective Committees of the Congress and the Senate. In January 2026, the President of the Congress, Francina Armengol, visited Türkiye.

5 Trade and economic relations

Spain and Türkiye maintain trade relations through the general EU-Türkiye framework and a series of recent bilateral agreements

and memoranda that strengthen investment, project financing and business cooperation. The main legal basis for trade in goods between Spain and Türkiye is the EU-Türkiye Customs Union Agreement, in force since 1996, which liberalises virtually all trade in industrial products and obliges Ankara to align with the EU's common external tariff and with part of the *acquis* on goods³⁶. Spain supports the modernisation of this customs union, considering that the agreement, concluded in 1995, has been partly overtaken by developments in the Turkish, European and global economies during its more than thirty years in force. A review and update of this agreement would serve to further deepen economic integration between Türkiye and the EU, provided that current rules are correctly applied and existing barriers are reduced.

Spain and Türkiye have in force an Economic and Industrial Cooperation Agreement (1992) and an Agreement on the Reciprocal Promotion and Protection of Investments (APPRI) dating from 1995 (which entered into force in 1998). The revision of the latter was agreed at the High-Level Meeting held in Madrid in June 2024. The two countries maintain relations in tax matters through a convention between the Kingdom of Spain and the Republic of Türkiye for the Avoidance of Double Taxation and the Prevention of Fiscal Evasion with respect to Taxes on Income and on Capital, which entered into force on 19 January 2004³⁷.

On the occasion of the 8th HLM held in June 2024, a series of MoUs were signed in the economic sphere³⁸:

- MoU between ICEX Spain Export and Investment and the Turkish Investment Office: to cooperate in the promotion of investment, the exchange of economic information and the promotion of mutually beneficial investments.
- MoU between COFIDES (Spanish Development Finance Company) and the Turkish Sovereign Wealth Fund (TWF): to strengthen collaboration and explore joint investment oppor-

³⁶ See: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=International_trade_in_goodschrome-extension://efaidnbmnnnibpcajpcgclefindmkaj/https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_turkiye_en.pdf

³⁷ See: www.exteriores.gob.es/documents/fichaspais/turquia_ficha%20pais.pdf

³⁸ See: <https://www.lamoncloa.gob.es/serviciosdeprensa/notasprensa/economia-comercio-empresa/Paginas/2024/130624-espana-turquia-acuerdos-comercio-inversion.aspx>

tunities, with a particular focus on technology sectors (green technology, agricultural technology, etc.) and the energy transition.

- MoU between CESCE (Spanish Export Credit Insurance Company) and Eximbank (Export Credit Bank of Türkiye): to promote cooperation in export credit and export credit insurance, thereby increasing coverage and security for bilateral trade and investment, as well as in third countries.
- MoU on Insurance Supervision: between the Directorate General of Insurance and Pension Funds of Spain and the Insurance and Private Pensions Regulation and Supervision Authority of Türkiye, for the exchange of information and cooperation in supervision.
- MoU on Energy Transition and the Environment: covering the areas of renewable energy, green hydrogen, and energy efficiency and security.

In June 2025, *Spain's Minister of Transport and Sustainable Mobility signed an MoU with his Turkish counterpart*. It covers the areas of rail transport, port and airport management, and digitalisation applied to mobility.

On the occasion of the aforementioned 2024 Summit, *the Spanish-Turkish Bilateral Business Committee (or Council)* was established and convened; it is sponsored in Spain by the CEOE (Spanish Confederation of Business Organisations) and in Türkiye by the DEIK (Foreign Economic Relations Board of Türkiye). The Committee is currently chaired on the Spanish side by Carlos Torres Vila, Chairman of BBVA, and on the Turkish side by Ebru Özdemir, Chairwoman of the Limak Group, one of the Turkish companies with the strongest presence in Spain.

Furthermore, Türkiye was chosen as the guest country at the 28th National Congress of Family Businesses (October 2025, Burgos) organised by the Institute of Family Business (IEF). The event was attended by the Executive Director of the International Energy Agency (IEA), Dr Fatih Birol, and twenty one Turkish business leaders.

5.1 Bilateral trade

The Turkish and Spanish economies are highly complementary. Over the last decade, trade between Spain and Türkiye has

doubled³⁹. In 2024, the total volume of trade reached EUR 18.458 million, with a fairly balanced pattern between exports and imports, although with a slight deficit for Spain⁴⁰. Spain exported goods worth EUR 9,013.5 million and Türkiye sold goods to Spain worth EUR 9,444.7 million. The same trend can be seen in 2025, a year in which the volume of trade grew by 7.61% compared to 2024, (data published in USD by the Turkish government), reaching a total of USD 20,660 million (Turkish exports to Spain USD 10,430 million, imports from Spain to Türkiye USD 10,170 million)⁴¹. This stability at high levels of trade supports the political objective of both governments to increase bilateral trade to around EUR 25 billion in the coming years⁴². Türkiye is currently Spain's fourth-largest trading partner outside the EU, behind China, the US and the UK.

The main products exported by Spain to Türkiye are: 1) motor vehicles, tractors and components; 2) machinery, industrial equipment and engines; 3) iron and steel castings and manufactured products; 4) plastics and manufactured products; 5) chemical products, including pharmaceuticals and blood plasma; 6) fuels and mineral oils and 7) clothing. Around eight hundred Spanish companies trade with Türkiye.

The main products imported by Spain from Türkiye are: 1) motor vehicles, tractors and their components; 2) textiles, including clothing; 3) refined petroleum; 4) machinery and mechanical appliances; 5) nuts, vegetable oils and fats; 6) iron and steel castings and related products; 7) chemical products and 8) rubber goods⁴³.

Both governments have identified eleven priority sectors capable of adding value to trade and investment relations: defence, construction, health, logistics, finance, renewable energy, agriculture, water management, the environment, the automotive sector and technology.

³⁹ See: <https://www.mfa.gov.tr/commercial-and-economic-relations-between-turkiye-and-spain.en.mfa>

⁴⁰ See: https://comercio.gob.es/es-es/NotasPrensa/2024/Paginas/RAN-espana-turquia.aspxchrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://www.investinspain.org/content/dam/icex-invest/documentos/publicaciones/doing-business/enEspana_50.pdfhttps://oec.world/en/profile/bilateral-country/tur/partner/esp

⁴¹ See: <https://oec.world/es/profile/bilateral-country/esp/partner/tur>

⁴² See: <https://thediplomatinspain.com/en/2024/06/14/spain-and-turkey-commit-to-reaching-25-billion-euros-in-trade-exchanges/>

⁴³ See: <https://tradingeconomics.com/spain/imports/turkey>

5.2 Investment

Spain regards Türkiye not only as a highly attractive investment destination, but also as a logistics hub for Central Asia and the Middle East, whilst Türkiye sees Spain as a major trading partner and friend, and a gateway to the markets of the European Union and Latin America. Joint opportunities in Africa are also being explored.

5.3 Spanish investment in Türkiye

By the end of 2023, the stock of Spanish investment stood at around EUR 7.8 billion.

Key sectors:

- Financial services: this is the cornerstone. BBVA holds a majority stake (85.97%) in Garanti Bankasi, one of Türkiye's leading private financial institutions.
- Textiles and fashion: Türkiye is a vital production and logistics hub for the Inditex group (Zara, Pull&Bear), which has an extensive network of suppliers and shops, and also for Mango.
- Insurance: Mapfre has a strong presence following the acquisition of General Sigorta.
- Infrastructure and transport: companies such as CAF (supplying trains for the Istanbul metro and high-speed lines) and OHLA have led railway and civil engineering projects (the Ankara-Istanbul line)⁴⁴.
- Energy and defence: notable companies include Gransolar (renewables), Técnicas Reunidas (refineries) and Navantia, which collaborated on the construction of the Turkish flagship TCG Anadolu.
- Tourism: the Barceló Group owns hotels in Istanbul.
- Technology and R&D: in 2025, bilateral calls for proposals (EUREKA programme) were launched to fund joint projects in AI, healthcare and advanced manufacturing between companies from both countries.

⁴⁴ The Spanish company OHL, in a consortium with the Turkish firm Alarko, undertook the construction of 206 km of double track between Ankara and Eskishehir for the high-speed train, under a contract partly financed by an FAD loan from the Spanish Government. The company CAF supplied some of the trains. The line was inaugurated on 13 March 2009.

5.4 Turkish investment in Spain

In recent years, there has been growing interest among Turkish companies in investing in Spain.

The most prominent sectors are:

- Construction and infrastructure: the Limak Group is carrying out the refurbishment works at the Spotify Camp Nou (FC Barcelona's stadium), a milestone for the visibility of Turkish engineering.
- Materials industry: Çimsa acquired Cemex's white cement plant in Buñol (Valencia), becoming a leading player in the sector in Spain.
- Steel industry: Tosyali expanded into the Spanish market with the purchase of Baika Steel Tubular Systems, based in Álava.
- Tourism and luxury: the Dogus Group has invested in the tourism sector (Marina Barcelona 92) and in high-end restaurants in Madrid (Ten con Ten, El Paraguas)⁴⁵.
- Logistics and aviation: Turkish Airlines has recently announced its entry into Air Europa, acquiring a 26% stake in the Spanish airline. To this end, a EUR 275 million capital increase has been subscribed, and the Turkish company has purchased shares from the Hidalgo family for a further EUR 25 million. The transaction is pending approval from regulatory and competition authorities. Turkish Airlines—which, according to reports, does not currently aspire to take control of Air Europa—seeks through this transaction to create mutual value and gain greater access to the Latin American market⁴⁶.

Ares Logistics, with an office in Barcelona and a network of services throughout Spain, focuses on transport and storage in sectors such as healthcare, food, chemicals and textiles. It uses Spain as a strategic distribution and logistics hub for Europe, North Africa, the Caucasus and Central Asia.

⁴⁵ See: <https://www.eleconomista.es/capital-riesgo/noticias/13525880/09/25/dogus-afendis-imsa-las-empresas-turcas-toman-posiciones-en-espana.html#:~:text=The%20list%20is%20extensive%20and%20is%20being%20completed,to%20the%20country%20after%20reaching%20an%20agreement%20with%20Cemex%20on%20the>

⁴⁶ See: <https://www.economiadigital.es/empresas/airbus-tai-2600-millones.html>

5.5 Sectors with the greatest potential for investment

Tourism: benefits from the strong connectivity between Türkiye and Spain. In the first eleven months of 2025, around 575,000 tourists from Türkiye arrived in Spain, and in the same period some 417,000 Spaniards travelled to Türkiye. Currently, there are 74 direct flights a week between Spain and Türkiye.

Airline	Type	Departure cities in Spain	Destination cities in Türkiye
Turkish Airlines	Turkish (National)	Madrid (MAD), Barcelona (BCN), Málaga (AGP), Valencia (VLC), Seville	Istanbul (IST) – <i>Istanbul Airport</i>
Pegasus Airlines	Turkish (Low-cost)	Madrid (MAD), Barcelona (BCN), Bilbao (BIO), Seville (SVQ)	Istanbul (SAW) – <i>Sabiha Gökçen</i> (mainly), Izmir (ADB), Antalya (AYT), Ankara (ESB)
Vueling	Spanish (Low-cost)	Barcelona (BCN)	Istanbul (IST) – <i>Istanbul Airport</i>
SunExpress	Turkish (Holiday)	Madrid (MAD)	Izmir (ADB), Antalya (AYT)
AJet (AnadoluJet)	Turkish (Low-cost, subsidiary of THY)	Madrid (MAD)	Ankara (ESB)

Main airlines and direct routes. Source: AENA and the airlines.

IBERIA operates several daily flights to Istanbul (SAW) in codeshare with Pegasus.

Other areas of great interest for investment are Infrastructure, concessions and civil engineering: 1) energy and energy transition, 2) automotive and components, 3) chemicals and pharmaceuticals, 4) digital services and 5) security and defence.

The Official Spanish-Turkish Chamber of Commerce and Industry was established in 2011 with the aim of promoting trade relations between Spain and Türkiye. It is based in Madrid. The Chamber has 130 members, including major companies from various sectors in both countries. The Office of Investment and Finance of the Presidency of the Republic of Türkiye participates in the Chamber as a state institution, and its members include companies such as Amadeus, Limak, Roca, Linklaters, Font & Yildiz Tax and Legal

Services, Arkas Holding, Banco Sabadell, Barceló Group, BBVA, Beko, Caixabank, Mapfre, Ferrovial, Técnicas Reunidas, Yilport, Turkish Airlines and Air Europa, amongst others.

The Chamber has divided its activities into several committees corresponding to the following priority areas: 1) infrastructure, 2) tourism and culture, 3) technology and digitalisation, 4) finance, 5) logistics and 6) industry, environment and sustainability.

The Chamber considers that the sectors with the greatest potential for business development between the two countries are: renewable energy and the green transition; automotive and components; machinery and capital goods; infrastructure and construction; and information technology. It also identifies significant opportunities in textiles and fashion, financial services, logistics, healthcare and tourism.

6 Defence relations

In the current geopolitical situation, with a major threat on Europe's eastern borders, an extremely unstable and conflict-ridden Middle East, and the United States shifting its attention to other regions, Türkiye is an indispensable ally of Spain.

This is due to its considerable military might (the second largest—and highly effective—military force in NATO after the United States), its robust defence industry and its active role in areas of strategic importance to Europe, such as the Eastern Mediterranean, the Turkish Straits, the Caucasus, Central Asia (countries with which it maintains close historical and cultural ties) and the Black Sea, the Middle East (including Syria and Iraq), the Balkans, North Africa (Libya) and even sub-Saharan Africa. In recent years, Türkiye has had troops deployed in Iraq, Syria and Libya and has even shown itself willing to participate in a potential international security force in Gaza, as envisaged in the Gaza peace plan (although Israel opposes this Turkish participation). Ankara has confirmed its participation in the 'Board of Peace', President Trump's initiative for the stabilisation and reconstruction of the Gaza Strip. Türkiye projects its naval power in the Eastern Mediterranean and the Black Sea.

Furthermore, it has played a significant role as a supplier of military equipment to Ukraine and as a mediator between Moscow and Kyiv, with some notable achievements such as the agreement reached in 2022 to resume Ukrainian grain exports (Black

Sea Grain Initiative⁴⁷). Türkiye is a strategically key country in a multipolar world. The next NATO Summit will be held in Ankara on 7 and 8 July 2026, and will be of momentous importance.

The recent accession of Finland and Sweden to the Atlantic Alliance (2023) and Russia's war of aggression against Ukraine have shifted NATO's priorities towards Eastern Europe, the Baltic Sea and the Arctic, indirectly influencing the role of Spain and Türkiye within the Alliance. Spain views Türkiye as a necessary partner to balance NATO's strategic focus, ensuring that the southern neighbourhood (the Mediterranean, the Middle East, North Africa, the Sahel) also receives the necessary attention from the Alliance and to reinforce the idea that the Mediterranean is a 'high-intensity' area and not merely a theatre for low-intensity missions or crisis management⁴⁸.

And now that Washington appears keen to reduce its responsibilities regarding the security of Europe and Europeans, and we are going to have to build a 'European Pillar' that leads us to military autonomy in the medium and long term, Türkiye's role is becoming increasingly important. That is why there is an interest in drawing Türkiye closer to Europe, preventing it from distancing itself from the continent's future. Türkiye is an Associate Member of Eurocorps.

For all these reasons, Spain has maintained close cooperation with Türkiye in the field of defence for decades, both in the industrial sphere (particularly in the naval and aerospace sectors⁴⁹) and in bilateral and operational military matters within the framework of the Atlantic Alliance.

The relationship between the two defence ministries is close. The two departments signed a technical cooperation agreement

⁴⁷ The agreement was reached during negotiations held in Istanbul on 22 July 2022, with the United Nations acting as mediator and the Russian and Ukrainian governments taking part. The agreement allowed ships carrying grain, fertilisers and other food products to leave three key ports: Odessa, Chornomorsk and Yuzhny (Pivdennyi). Ukrainian grain exports are vital for food security in countries such as Egypt, Lebanon, Tunisia, Yemen, Somalia, Ethiopia and Afghanistan, often channelled through the World Food Programme (WFP).

⁴⁸ Spanish and Turkish forces have participated together in peacekeeping operations in Bosnia and Herzegovina, Kosovo, Afghanistan and Lebanon. And in the naval sphere, in Operation 'Sea Guardian' in the Indian Ocean.

⁴⁹ Since the 1980s, the then 'Construcciones Aeronáuticas S.A.' (CASA) and Turkish Aerospace Industries (TAI) maintained a fruitful industrial partnership, with the assembly in Türkiye of C-212 and CN 235 aircraft.

in 1999 and an Agreement on the Protection of Classified Information in the Defence Industry in June 2014. There is a frequent exchange of visits by senior military commanders from both countries. In January 2025, the Chief of the Army General Staff (JEME, by its Spanish acronym), General Amador Enseñat, paid an official visit to Türkiye at the invitation of his Turkish counterpart, General Selçuk Bayraktaroğlu. The JEME visited the facilities of leading companies in electronics, electro-optics, land vehicles, defence technology, missiles and rockets, as well as the Turkish Army's UAV (Unmanned Aerial Vehicle) brigade. He also travelled to Incirlik Air Base, east of Adana, where he visited the Spanish contingent deployed there⁵⁰. In October 2025, the Commander of the Turkish Land Forces, General Metin Tokel, visited Spain at the invitation of the JEME.

Bilateral talks are ongoing between the General Staffs of the respective Navies and Air Forces and between the national directors of armaments of both countries.

Spain and Türkiye contribute combat vessels to NATO's standing naval groups and major exercises in the Mediterranean, where amphibious operations, air defence and anti-submarine warfare are practised, thereby strengthening deterrence against state and non-state actors in the south. Both navies conduct regular bilateral exercises in the Mediterranean, such as those held in March 2025, during which amphibious manoeuvres, anti-submarine warfare and integrated air defence were practised, improving interoperability for NATO operations on the southern flank.

6.1 Deployment of Patriot missiles

Since 2015, Spain has maintained a Patriot battery deployed at Incirlik Air Base under NATO command ('Operation Support Türkiye'), to reinforce Turkish air defence against missile and aircraft threats in an area that is highly sensitive due to its proximity to Syria and the fact that nuclear weapons are stored at the base. This mission involves the permanent deployment of around 140 Spanish military personnel. Both sides regard this mission as

⁵⁰ See: <https://ejercito.defensa.gob.es/eu/personal/jeme/jeme-ensenat/actividades/2025/221-jeme-refuerza-cooperacion-militar-turquia.html>

a demonstration of allied solidarity and as a highly positive factor in bilateral relations⁵¹.

6.2 New advanced trainer aircraft

In 2024, Spain and Türkiye signed a memorandum of understanding (MoU)⁵² to explore the joint development of a new advanced trainer aircraft to replace the Spanish SF-5M (F-5 Tiger II). This was a further step in the already well-established cooperation between the aerospace industries of both countries⁵³.

The aircraft, designed by Turkish Aerospace Industries (TAI), has been named 'Hürjet' and is still in the development phase, with the first units expected to be delivered to the Turkish Air Force in 2026. In May 2025, coinciding with the FEINDEF defence products fair, TAI signed a Memorandum of Understanding (MoU) with a dozen Spanish companies to launch the joint development of



Figure 3. Hürjet trainer. Source: Defensa.com

⁵¹ See: https://emad.defensa.gob.es/en/operaciones/operaciones-en-el-exterior/36_Persistent_Effort/36.5_Support_to_Turkiye/index.html_2063069299.html, <https://www.armyrecognition.com/news/army-news/2025/spain-marks-a-decade-of-patriot-system-deployment-in-tuerkiye-under-nato-command>

⁵² The Government awards Airbus and the Turkish firm TAI the contract for the system that will replace the Air Force's F-5s, worth 2.6 billion.

⁵³ See: <https://defence-industry.eu/spain-and-turkey-sign-memorandum-of-understanding-for-trainer-aircraft-development/>, https://www.eldebate.com/espana/defensa/20241229/espana-escoge-avion-turco-tai-hurjet-pilot-training-top-gun_256375.html <https://www.infodefensa.com/texto-diario/mostrar/5445911/gobierno-eleva-45-numero-aviones-hurjet-adquirira-formar-pilotos-caza-espanoles>

the platform. The Spanish side will be led by Airbus Defence & Space, which will coordinate the entire industrial process carried out in Spain. The contract, valued at EUR 2.6 billion, will be carried out over the next ten years and includes advanced training aircraft, state-of-the-art simulators and a comprehensive logistics support system. According to the available information, the first deliveries to Spain's Air and Space Force will take place from 2028 onwards.

Amidst the controversy surrounding the Spanish government's decision not to acquire US-made F-35 aircraft and the uncertainty regarding the Future Combat Air System (FCAS) programme, rumours have emerged regarding possible Spanish interest in the fifth-generation KAAAN fighter, a project being developed by the Turkish defence industry. TAI Director Mehmet Demiroğlu has stated that there is mutual interest⁵⁴, but that, for the time being, no Spanish participation in this project has been finalised.

6.3 Shipbuilding

Navantia is collaborating with the Turkish shipyard Sedef on the development of a sixty-thousand-tonne conventional aircraft carrier, an improved version of the Turkish MUGEM, under construction from 2025. This project builds on the legacy of the TCG Anadolu, the Turkish Navy's 'flagship', based on the Spanish design of the amphibious vessel Juan Carlos I, incorporating catapults for fixed-wing aircraft and advanced systems.

The agreement, revived in 2025, includes design by Navantia, with construction in Türkiye, generating a considerable workload for the Spanish company, mainly in engineering. Both nations seek to reduce external dependencies and strengthen their naval industry within the NATO framework. The vessel will operate up to fifty aircraft, both manned and drones such as the Kizilelma or Hürjet⁵⁵.

Beyond the naval and air sectors, Spanish-Turkish cooperation in the defence sector holds potential in land systems (armoured

⁵⁴ See: https://www.elespanol.com/observatorio-defensa/20251122/mehmet-demi-roglu-director-general-ta-espana-paises-colaborar-caza-kaan/1003744024325_0.html

⁵⁵ See: <https://camarahispano-turca.org/es/noticias/navantia-disenara-un-mega-buque-para-la-armada-de-turquia-que-se-hara-en-ese-pais/>, <https://galaxiamilitar.es/turquia-inicia-la-construccion-de-un-portaaviones-de-60-000-toneladas-para-sistemas-tripulados-y-no-tripulados/>

vehicles and ammunition); drones⁵⁶; C4ISR systems and battlefield digitalisation; electronic warfare, sensors and optronics; air defence and anti-missile systems; missiles, guided munitions and launch systems; cyber defence; military space (observation satellites); military logistics; and joint participation in NATO multinational programmes.

7 Cultural relations

Türkiye and Spain have a Cultural Cooperation Agreement in force, signed in 1959 and subsequently updated. The Agreement and its updates facilitate academic exchanges, exhibitions, university cooperation and artistic activities.

7.1 Spanish in Türkiye

Spanish is the third most popular foreign language—after English and German—in Türkiye. Our language has grown significantly in the country, both in language schools and at university level.

In the university sector, the department with the longest-standing tradition is the Department of Spanish Language and Literature at Ankara University, which forms part of the Department of Western Languages within the Institute of Social Sciences. It offers undergraduate and postgraduate programmes (including a Master's degree) focusing on Spanish literature, the history of the Spanish language and literary analysis, as well as Latin American literature and history⁵⁷.

Within the Department of Western Languages of the Faculty of Arts at Istanbul University, there is the Department of Spanish Language and Literature, which offers undergraduate (Major and Minor) and master's programmes⁵⁸.

⁵⁶ Türkiye has become one of the leading producers and exporters of military drones. Turkish drones, such as the Bayraktar TB2, have been used successfully in various conflicts, including those in Syria, Libya and Nagorno-Karabakh, and have demonstrated Türkiye's ability to produce and deploy advanced technologies effectively. (Valencia, 2024).

⁵⁷ See: https://bbs.ankara.edu.tr/Amac_Hedef.aspx?bno=3638&bot=1153&utm_source=chatgpt.comhttps://hispanismo.cervantes.es/departamentos/universidad-ankara-ankara-universitesi-departamento-lengua-literatura-espanola?utm_source=chatgpt.com

⁵⁸ See: <https://tanitimedebiyat.istanbul.edu.tr/en/content/western-languages-and-literatures/spanish-language-and-literature>

Other Turkish universities offering Spanish Language and Literature studies (within the Departments of Foreign Languages or Western Languages) include Marmara University and other private institutions such as Bahçeşehir, Koç, Sabancı, Yeditepe, and Boğaziçi.

Of particular importance is the Cervantes Institute Centre in Istanbul⁵⁹. The Centre is governed by the Agreement between Spain and Türkiye on the Establishment and Operation of Cultural Centres, signed on 26 April 2002 and which came into force on 2 February 2004. The Cervantes Institute promotes the teaching of Spanish⁶⁰ and the dissemination of Hispanic culture through courses, cultural events and local partnerships. It offers Spanish classes for all levels, DELE exams and teacher training, alongside workshops and seminars at branches in Ankara and other cities. It organises theatrical performances and historical conferences on Spain-Türkiye relations, as well as literary events featuring Spanish and Latin American writers.

In June 2024, the Instituto Cervantes opened a new branch in Ankara, in collaboration with Başkent University (private)⁶¹.

7.2 The Turkish language and cultures in Spain

In June 2024, a Memorandum of Understanding (MoU) was signed between the Instituto Cervantes in Spain and the Yunus Emre Institute in Türkiye⁶². The aim is to strengthen cultural and educational cooperation, develop joint projects, promote language cooperation programmes (Spanish in Türkiye and Turkish in Spain) and organise high-impact cultural events.

The Yunus Emre Institute began its activities in Madrid in 2018 and in 2025 opened its headquarters in the Spanish capital (located in the Chamberí district). The Institute offers face-to-face Turkish language classes and promotes exhibitions, cultural events, conferences, and classes in pottery and calligraphy.

⁵⁹ The Centre was inaugurated on 17 September 2001 by the then Turkish Prime Minister Bülent Ecevit and the Spanish Prime Minister, José María Aznar. The author of this chapter, then Spanish Ambassador to Türkiye, took part in the inauguration.

⁶⁰ Since its opening in 2001, annual enrolment has grown from 1,803 to over 3,500 students, consolidating Spanish as a key language in Türkiye.

⁶¹ Bağlıca Campus, Fatih Sultan Neighbourhood, Eskişehir Road 18th km, 06790 Etimesgut, Ankara, Türkiye.

⁶² See: <https://www.fundeu.es/noticia/espana-y-turquia-firman-un-memorando-para-fomentar-la-cultura-y-lengua-espanola-en-el-pais/>

The poster is for Turkish language courses (A1.1-A2.1) at Yunus Emre Enstitüsü. It features a dark blue background with a circular inset image of a Turkish cityscape with a mosque. The text is in white and yellow. The logo of Yunus Emre Enstitüsü is at the top. The title 'CURSOS PRESENCIALES DE TURCO (A.1.1-A2.1)' is in white. The registration period 'Período de inscripción 12 de enero - 12 de febrero' is in yellow. The start of classes 'Inicio clases:' is in yellow, with details for A1.1 and A2.1 levels. The price 'Precio : 350 Euros (-30 Euros Libros)' is in yellow. The duration 'Duración: 72 Horas' is in yellow. The location 'Centro Cultural Turco Yunus Emre Calle de El Españoleto 17, 1A' is in white. Social media links for yee.madrid, madrid@yee.org.tr, and yeeispanya are at the bottom.

YUNUS EMRE ENSTITÜSÜ

CURSOS PRESENCIALES DE TURCO (A.1.1-A2.1)

Período de inscripción
12 de enero - 12 de febrero

Inicio clases: 16 de febrero (18:30-21:30)
(*A1.1: Martes y Jueves
A2.1: Lunes y Miércoles)

Precio : 350 Euros
(-30 Euros Libros)

Duración: 72 Horas

Centro Cultural Turco Yunus Emre
Calle de El Españoleto 17, 1A

yee.madrid madrid@yee.org.tr yeeispanya

Figure 4

The Turkish language is taught as a subject within the linguistics and language studies programmes at the Faculty of Philology of the Complutense University of Madrid (UCM) and also within the Bachelor’s Degree in Semitic and Islamic Studies. In 2025, the first Chair of Turkish Studies in Spain was established at the UCM.

The Autonomous University of Madrid (UAM) offers Turkish language courses as an optional subject within the Philology programmes of the Bachelor’s Degree in Asian and African Studies. The University of Granada offers Turkish as a subject within Translation/Linguistics, and the Toledo School of Translators, part of the University of Castilla-La Mancha (UCLM), offers introductory courses in Turkish.

Within the Erasmus programme, Spain ranks fourth among the top destinations for Turkish students. Since 2004, more than 43,000 Turkish students have taken part in this programme in Spain.

Spanish culture holds great appeal in Türkiye, which is why we participate in cultural events there. One example is the exhibition ‘Born in the Seventies’, featuring a collective of artists born in the 1970s, held as part of the Contemporary Istanbul Fair in 2024.

The exhibition's curator was Juan Manuel Bonet, former director of the Instituto Cervantes and the Reina Sofía Museum.

Türkiye also holds great appeal in Spain from a cultural perspective. One example is the interest aroused by the Göbeklitepe and Taş Tepeler archaeological sites (Neolithic), located near the city of Sanliurfa, which are among the oldest known monumental complexes in the world. The exhibition by the Spanish photographer Isabel Muñoz, comprising photographs taken at Taş Tepeler, was displayed in 2024 and 2025 at the Museum of Anthropology in Madrid and the Altamira Museum.

7.3 The Sephardic community in Türkiye. The Judeo-Spanish language

The Ottoman Sultan Bayezid II actively promoted the reception of Sephardic Jews expelled from Spain in 1492, considering them a highly useful economic, intellectual and technical asset for the Empire. During the 16th and 17th centuries, the Ottoman Empire became the main centre of the global Sephardic diaspora. The Sephardim preserved a form of 15th-century Castilian, now known as Ladino or Judeo-Spanish, which has been heavily influenced over the centuries by Hebrew, Turkish and French.

Türkiye is one of the last major centres of Ladino, although the language is seriously endangered because it has been preserved mainly through oral tradition, although there has also been a valuable body of literature and even a newspaper of the Jewish community—'Shalom'—which included a section in Ladino. It has also been preserved in songs, proverbs and liturgy. Given that it is transmitted through oral tradition, it is being lost among the younger generations.

Currently, the Jewish community in Türkiye numbers between fourteen thousand and eighteen thousand people, the majority of whom are of Sephardic origin. It is concentrated mainly in Istanbul and—to a lesser extent—in Izmir. In recent years, following the passing of laws in Spain that facilitate the acquisition of Spanish nationality for people of Sephardic origin, numerous members of the community in Türkiye have applied for and obtained Spanish nationality, which allows them to enter the European Union without the need for a visa. The Instituto Cervantes in Istanbul organises conferences, exhibitions and cultural events related to Ladino and the local Sephardic community.

The Sephardic heritage has become one of the strongest cultural bridges between Spain and Türkiye.

8 Friendship between two peoples

A few years ago, a lecturer at the University of the Basque Country asked his students to write down their thoughts on Türkiye. Among the responses, one in particular stood out: 'Türkiye is, in principle, a distant country, but very similar to ours because it is Mediterranean, and has a climate and cuisine that are similar. It is like a first cousin'.

And, indeed, there is a natural affinity between Turks and Spaniards, despite the fact that in Spain there is a great deal of ignorance regarding the history and reality of Türkiye, which is regrettable given that both countries have constituted the most important Mediterranean empires since the Roman Empire and have had intense contact throughout history, as we have seen. Because of this lack of knowledge, what has remained in the minds of many Spaniards is only the idea of the confrontation referred to above, which has been somewhat mythologised (Cervantes, 'the One-Armed Man of Lepanto'), and which for quite some time was a negative factor in the development of Spanish-Turkish relations and a source of considerable prejudice (some of which still persists today).

During my posting as Spanish Ambassador to Türkiye (2000–2004), I was able to appreciate the genuine warmth towards our country. When I mentioned my Spanish nationality, I was very often met with a smile and the remark: 'It's just that Turks and Spaniards are very similar; we're both Mediterranean'. At that time, Spain's transition to democracy and the modernisation of our economy following accession to the EU aroused admiration and a desire to emulate us on the Turkish side.

The emphasis on Spanish-Turkish friendship is reiterated in the official documents and statements of both governments, and is reflected in practical terms in the mutual aid provided during natural disasters suffered by both countries, such as the earthquakes in Izmit (1999) or Kahramanmaraş (2023) in Türkiye, or the Covid-19 pandemic in Spain.

If there is one characteristic that stands out about the Turkish people, it is their hospitality, solidarity and generosity. As a former ambassador to Türkiye, I cannot forget the friendship and solidarity shown by the Turkish authorities and citizens following

the tragic Yak-42 plane crash in May 2003, in which 62 Spanish military personnel returning from their mission in Afghanistan lost their lives. In May 2004, on the first anniversary of the tragedy, two monuments were unveiled in the Turkish province of Trabzon, where the accident occurred, funded by the local authorities. The first, located in the town of Maçka, consists of a bronze statue depicting a Turkish soldier holding a wounded Spanish soldier in his arms. It was conceived as a monument to Spanish-Turkish friendship. The other monument is a metal obelisk erected at the site of the accident, on the slopes of Mount Pilav (2,100 metres above sea level). Both monuments bear the engraved names of the 62 Spanish soldiers who died in the Yak-42 crash.

Particularly moving was the speech given by the mayor of Maçka, Ömer Yıldız, at that ceremony, in which he recalled the phrase attributed to Atatürk regarding the Australian and New Zealand soldiers who fell at the Battle of Gallipoli during the First World War: 'Having lost their lives on this land, they have also become our sons'. Likewise, the mayor noted, the Spanish military personnel who died in the accident in Trabzon whilst returning from a peacekeeping mission are also sons of this land. And at the summit of the mountain where the accident occurred, children, adults and the elderly from the humble nearby villages waited in silence for the victims' relatives, carrying bouquets of flowers which they presented to the Spaniards.

One factor that has served to strengthen the bonds of friendship between Spain and Türkiye is the initiative known as the 'Alliance of Civilisations', launched in 2005 (in 2025, the Alliance celebrated its twentieth anniversary), as a response to the polarisation and extremism that emerged following the attacks of 11 September 2001⁶³. The fact that it was a joint initiative of the Prime Ministers of Spain and Türkiye was, in itself, a powerful symbol of friendship. It demonstrated that two countries with distinct historical and cultural traditions (one with a strong Christian tradition and one predominantly Muslim) could collaborate closely on a high-level global project.

Although the Alliance operates under the umbrella of the United Nations (eleven Global Forums have already been held⁶⁴), it

⁶³ Professor Carmen Rodríguez López describes the 'Alliance of Civilisations' as the counterpoint to the 'Clash of Civilisations' from Samuel Huntington's well-known work.

⁶⁴ The latest Global Forum was held in Riyadh (Saudi Arabia) on 14 and 15 December 2025.

has inspired and facilitated numerous academic and cultural exchanges between Spain and Türkiye. These projects focus on the four pillars of the Alliance: education, youth, migration and the media, increasing mutual understanding and highlighting the values shared by both societies in the face of rhetoric of confrontation and extremism.

The Alliance has ensured that the Spanish and Turkish governments maintain a constant, high-level political dialogue, acting as a pact of friendship and strategic collaboration that has cemented a relationship of mutual respect and joint leadership on the global stage. Although critical or sceptical voices have occasionally been raised regarding the Alliance of Civilisations and the approach has shifted since 2005, the reality is that it constitutes a valuable instrument in the relationship between Spain and Türkiye that should be preserved.

Conclusions

Relations between Spain and Türkiye are deeply rooted in the history of both countries and have evolved from a bitter confrontation in past centuries to a deep friendship and great dynamism today across all spheres.

These relations are shaped by both countries' membership of the Atlantic Alliance and their location on the southern flank, which makes them highly sensitive to security issues in the Mediterranean region, the Middle East and North Africa.

Spanish-Turkish relations are also very much situated within the European and Atlantic context. Both countries have had to travel a long road in their rapprochement with Europe, and Spain has always been one of the Member States most supportive of Türkiye's bid for EU membership, encouraging Türkiye to introduce the reforms necessary to make progress towards accession. Unfortunately, in recent years serious obstacles have arisen, such as the unresolved Cyprus conflict and the erosion of democracy and institutional setbacks within Türkiye itself, which have had a negative impact on the country's EU accession process. Apart from that, in Türkiye there is a constant tension between the desire to be a European power (which it truly is) and its vocation to play a very significant role in the Islamic world and in the Turkic-speaking republics of the Caucasus and Central Asia, of which it is also a part. As for Europe, unfortunately, on many

occasions, greater emphasis has been placed on what separates us from Türkiye than on what unites us with that country and with the Turkish people.

Domestically, both countries have suffered the scourge of jihadist and separatist terrorism (the PKK in the case of Türkiye, ETA in the case of Spain).

Perhaps the outstanding issue in Spanish-Turkish relations is bringing the civil societies of both countries closer together. There is still a section of Spanish society which, probably due to a lack of knowledge, maintains a somewhat distorted image of Türkiye that does not reflect reality.

For this reason, I believe that measures should be introduced to bring the civil societies of both countries closer together. One example could be the establishment of a Civil Society Forum, similar to those Spain has with various countries such as Brazil, Japan, India or Australia, perhaps in collaboration with the IEMED (European Institute of the Mediterranean). And I believe that, to this end, a Spain-Türkiye Council Foundation should be established to develop relations in the civil society sphere. We would like to make this suggestion to the Ministry of Foreign Affairs, European Union and Cooperation and its Turkish counterpart.

It is also necessary, in my opinion, to preserve the special framework of relations provided by the Alliance of Civilisations, which facilitates a very valuable dialogue between the two countries.

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(With thanks to Professor Carmen Rodríguez López)

Chapter Two

The geopolitics of Türkiye: a necessary player in the new global order

José Ignacio Castro Torres

Abstract

Throughout history, Türkiye has been defined by its dual nature as a geopolitical pivot or a geopolitically active player, depending on the imposition of external powers. The major players in the new global order have sought to draw Türkiye into their respective spheres of influence to serve their geopolitical interests. However, Türkiye's strategic position as a double pivot, between Europe and Asia, and between the Black Sea and the Mediterranean, gives it crucial importance in the world order. This global position is combined with the strength of the Turkish territory and its population. Even its lack of energy resources can be overlooked due to its privileged location, giving it the potential to be a major power.

Keywords

Türkiye, Geopolitics, Pivot, Central Corridor, OTS.

Introduction. The land bridge versus the central position

Zbigniew Brzezinski classified geopolitically active actors as those possessing the capacity and the will to exercise power beyond their borders, thereby altering the international order. Such states tend to be geopolitically volatile for various reasons, including nationalist, religious, ideological or economic impulses. Furthermore, this author regarded as pivot states those whose significance did not derive from their power and the will to exercise it, but from their strategic position, which could make them vulnerable to the actions of active actors with hegemonic aspirations. Generally, the location of pivot states provides access to key resource areas or may deny it. According to Brzezinski, Türkiye's qualities confer upon it the role of a pivot. However, depending on the stance it adopts, Türkiye has the potential to become a geopolitically active actor (Brzezinski, 1997: 39–40).

It is due to this dual nature of Turkish geopolitics that, throughout history, the territory currently occupied by this state has been the centre of great empires, yet has also endured difficult times in which the hegemonic powers of the day sought to dominate it in order to exploit the significant advantages afforded by its geography.

The thalassocratic vision of a geopolitical pivot

From an Atlanticist perspective, there is a tendency for Türkiye to be seen as a geopolitical pivot, adopting a conciliatory stance towards potential conflicts that may arise in the volatile region that acts as a hinge between Eastern Europe and the Middle East. For this reason, it is believed that Türkiye could serve as a stabilising force in the Balkans, the Black Sea and the Caucasus, whilst also containing Russia, controlling the straits between the Mediterranean and Black Seas, moderating Islamic fundamentalism in the Middle East and serving as a regional foothold for NATO (Brzezinski, 1997: 46).

From this Anglo-Saxon perspective, the role of geopolitical pivot is also significant because it views Türkiye as a land bridge that, via the Anatolian peninsula, links East and West. Thus, Türkiye's privileged position is reflected as a communication route within Halford Mackinder's 'Inner Crescent' or Nicholas Spykman's 'Rimland', constituting a strip of land that cuts through the waters of the Mediterranean Sea to the south and those of the Black Sea

to the north. This characteristic tends, to some extent, towards isolation within its sphere of influence, due to the bodies of water that hem it in from the north and south (Kaplan, 2012: 284–286).

Consequently, from a very long-term historical perspective, the Anglo-Saxon view holds that the connection with Europe is more important than the projection towards the Middle East. Hence the historical significance of ancient Constantinople, and the fact that Istanbul ultimately became the port of connection used by the Ottoman Empire to access the Balkans, the Mediterranean and North Africa, whilst also serving as the terminus for caravans from the Caucasus, Central Asia and more distant regions (Kaplan, 2012: 286–290). This idea, which was maintained in the founding of Atatürk’s modern Türkiye, was eventually transferred to Türkiye’s aspirations to join the EU. However, European obstacles, combined with a shift in Türkiye’s foreign policy stance, led to a change in the geopolitical mindset of 21st-century Türkiye.



Figure 1. US presence on the Eurasian bridge centred on the Incirlik base (Toprak, 2025)

The Confucian perspective of a transit territory

The Chinese perspective is based on the aforementioned premises, as for the New Silk Road, Türkiye is a transit country through which major land transport routes run. These routes are intended to carry all kinds of goods, as well as energy products, in a two-way flow, whereby Chinese manufactured goods reach European commercial terminals via the initiative’s Central Corridor. The

distinguishing feature of the Chinese perspective is their commitment to Türkiye's orientation towards the East, abandoning any form of dependence on the Europeans, to the extent that it serves as a counterbalance to the progressive deterioration of relations with the US and NATO (世界知识, 2022).

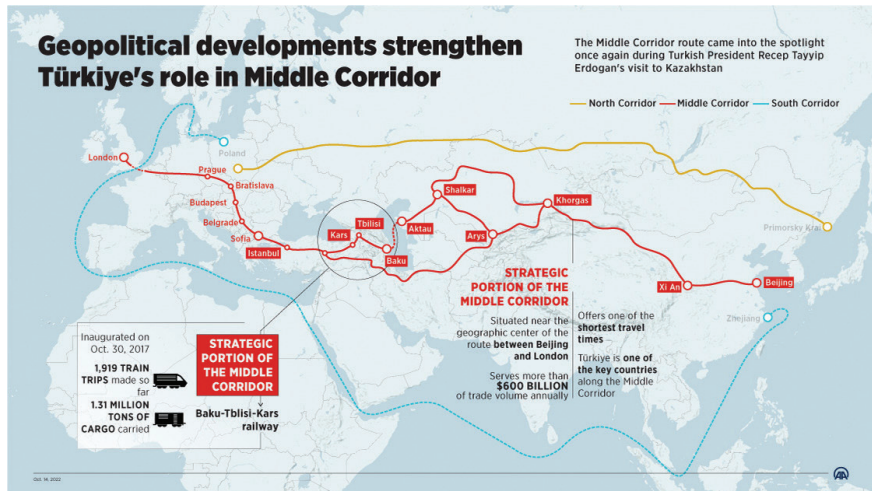


Figure 2. Türkiye's strategic position in the Central Corridor of the Belt and Road Initiative (Inat and Duran, 2023: 95)

A pro-European approach for a Eurasian actor

The pro-European approach towards Türkiye stems from fears regarding the influence Russia might exert over the territory of the Union. For Europe, Türkiye represents a viable alternative to bypassing the territory of the controversial and disputed Ukraine. The European perspective also views Türkiye as a land bridge through which all manner of goods can be received, particularly energy resources from the Caucasus and those originating from Central Asia. However, the distinguishing feature of the pro-European approach is that Türkiye serves as the link that binds the *Intermarum* region, viewing this as the connection between the Caspian and Black Seas (Petersen, 2011: 127-132).

Europeans, including of course the United Kingdom, fear a situation in which Türkiye leans towards the Middle East, though they fear even more a possible Turkish reorientation forced by Russia. This is because control of the Turkish straits, and the legitimacy conferred by the *Montreux Convention*, is what can allow or deny Europeans and Atlanticists access to the waters

of the Black Sea and thus contain Russia’s power in this sea. A pro-European approach to Türkiye would mean that Ukraine would not hold the importance it currently possesses, transforming the Black Sea into a corridor in which the threat from Russia would be contained by Türkiye (Petersen, 2011: 132).

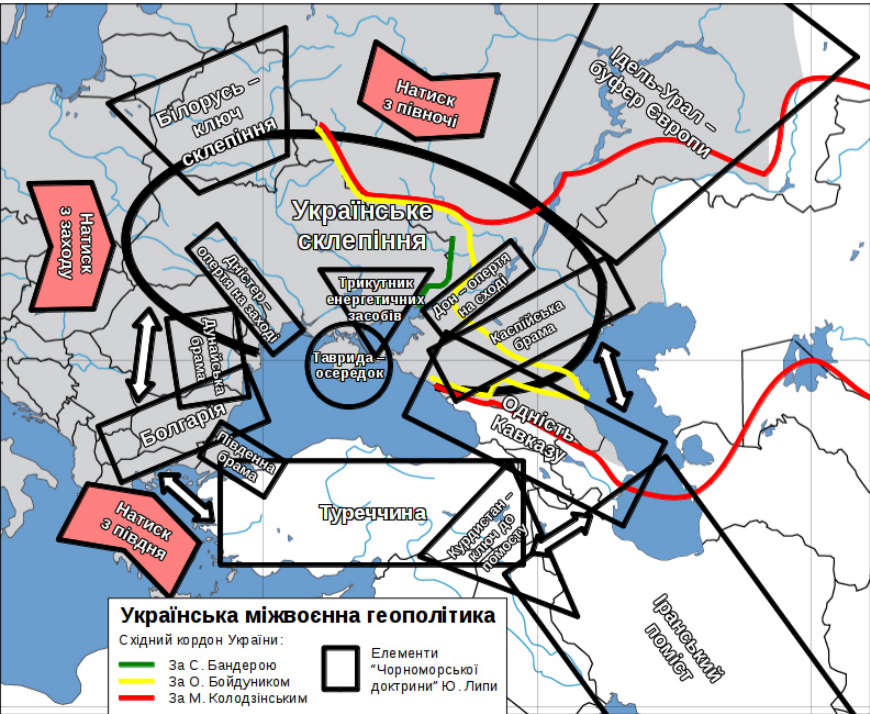


Figure 3. The significance of Ukraine and Türkiye in pro-European theories of the Intermarium and the Black Sea (Hodos, 2023). Note that, should Europe lose its influence over Ukraine, control over Russia could be exercised by Türkiye’s central position

A tellurocratic approach to containment in the south

Russia itself observes Türkiye’s position from the north, seeing it as a potential guarantor of its fleet’s passage from the Black Sea to the Mediterranean. The Turkish straits have always been a constant source of concern in Russian geopolitics. One must bear in mind the numerous Russo-Turkish wars and the fact that the Russians were party to the secret Sykes-Picot Agreement, with Lenin’s disclosure of the agreement being prompted precisely by the failure to grant control of the Turkish Straits to the newly formed USSR (Наумкин, 2016).

The Russian neo-Eurasianist conception views Türkiye as an expendable pawn in its project. Therefore, the treatment of the Turks should be similar to that meted out to the Atlanticists, led by the US. If Russia were to perceive any internal weakness in Türkiye, due to centrifugal tensions, this could be exploited by supporting the minorities living within Turkish territory (Дугин/ Dugin, 1997: 229).

Given Russia's geopolitical orientation, it is hardly surprising that relations between the two tend to be competitive. However, depending on the historical moment, they may become allies of convenience provided there is a common need in a specific location, whilst maintaining rivalry in other scenarios. For this reason, the complex relations between the two states could be classified as transactional and compartmentalised, although they have remained relatively stable thanks to robust diplomacy and pragmatic flexibility (Öğütçü, 2025).

However, there are certain issues on which Russian positions cannot align with those of Türkiye. This is particularly evident in the South Caucasus and Central Asia, which for the Turks form part of their own world, but for Russia constitute its 'immediate abroad' (Sabanadze and Dalay, 2025). Added to this is the Russians' pathological fear of the vulnerability of their borders,



Figure 4. Russian perception of Turkish influence on the Russian Federation and its immediate abroad (Маржецкий, 2021)

which leads some sectors of Russian geopolitics to believe that a union of Turkic peoples across Eurasia could pose a threat to the Russian Federation.

A critical perspective as an explanatory model

Despite all the above considerations, the geopolitical concepts of major actors on the international stage are not sufficiently explanatory due to the partial, and often self-serving, nature of their own perceptions when addressing the geopolitical concept of Türkiye. A critical approach to this phenomenon suggests that it is not only global and local ruling elites who can shape relations between actors, but that society as a whole is also capable of being an influential participant. Furthermore, the supranational state and social structure is of great importance when explaining geopolitical phenomena. The role of certain influential groups, such as experts, academics or religious leaders, must also be considered. Similarly, a critical perspective cannot overlook pragmatism in geopolitical study, as this is based on the discourse that justifies actions (Tuathail and Toal, 1996: 46–48).

For this reason, throughout this paper, we will not only consider the aforementioned classical geopolitical theories, all of which offer a particular approach to the phenomenon of Türkiye. The central thread of Turkish geopolitics must therefore take into account Türkiye itself as a whole and start from a perspective that more clearly defines its role in the domestic, regional and global contexts. Although simplicity might lead the study to three concentric geopolitical circles, this could prove insufficient if other, eccentric and overlapping circles were not taken into account, which in the context of Türkiye may be particularly relevant. For this reason, it is considered that this chapter should be approached by studying the country's domestic geopolitics; its relations with the most immediate kindred societies, such as its Azerbaijani neighbours in the Caucasus and the Turkmen communities in the Middle East; another sphere of interaction comprises the Turkic-speaking regions of Central Asia, the Russian Federation and the EU itself, where the Turkish diaspora in Germany constitutes a large community; following this examination of Turkish communities both within and outside the state's territory, relations within regional and global spheres could be considered.

1 National sovereignty as a factor in Türkiye's geopolitics

Türkiye's territory shapes its status as a geopolitical entity in the international sphere. Its position as an east-west pivot, straddling Europe and Asia, affords it the potential to serve as a land bridge between East and West in a new global order. Control over the flow of products, goods and services in both directions along this axis highlights the territory's importance. However, this hinge is twofold, as the north-south configuration and control of the straits make it the guardian of the passage from the Caucasus to the Levant and from the Black Sea to the Mediterranean Sea.

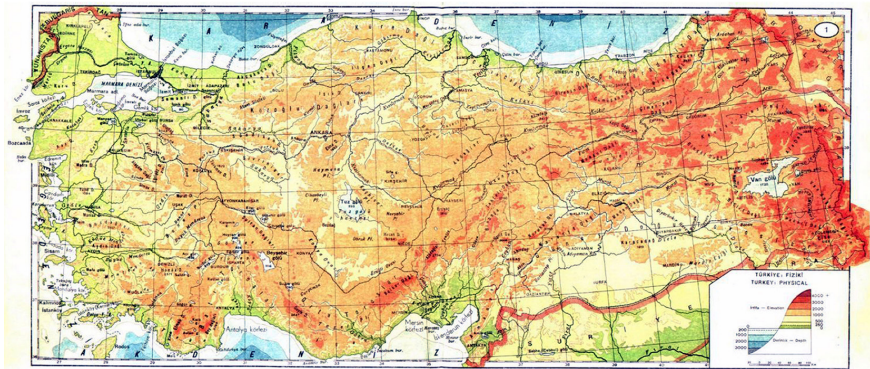


Figure 5. Physical map of Türkiye (Mapsland, 2025)

The fact that its territory is split across two continents and, above all, the proximity of islands under Greek sovereignty, situated very close to the Turkish mainland, are a source of controversy that has led to incidents over the years. The Asian territory is equally problematic, for whilst its mountainous terrain affords it a strategic advantage over the surrounding areas, it also features geographical compartmentalisation, which may partly explain the causes of Türkiye's internal problems. Broadly speaking, the unifying block of the Anatolian peninsula is evident, from which the security of the European Turkish territory is maintained (Stratford, 2023). As the terrain shifts eastwards, it becomes increasingly fragmented towards the headwaters of the Euphrates and Tigris rivers. Control of the sources of both rivers, which Türkiye considers to be transboundary, grants the country a position of power in a region where water is a highly prized resource (Acar, 2006: 69–70). However, the terrain becomes increasingly rugged in the direction indicated, reaching heights of over five thousand metres at Mount Ararat. This type of geographical configuration

makes it difficult for centralised power to be exercised, which encourages the emergence of local powers.

Türkiye's population, numbering over 85 million people, is a crucial part of its strength. Its core population originated in Central Asia and settled in the territory following the Battle of Manzikert in 1071, displacing the Byzantines. As a rugged, mountain-dwelling people, they maintained a predisposition to expand into the surrounding areas (Demir, 2017: 249–250), which explains the establishment of the Ottoman Empire and its survival until after the First World War. After the war, Mustafa Kemal (Atatürk) founded modern Türkiye following the Treaty of Lausanne, rejecting the humiliating terms of the Treaty of Sèvres (Tatar, 2020).

Taking a brief detour from the timeline, it is worth noting that Türkiye is home to several ethnic minority groups, such as the Kurds, Roma, Dönmes, Arabs and Caucasian peoples. Ethnicity is further shaped by various cultural, linguistic and religious factors (Karimova and Deverell, 2001: 12–16). Among these groups, the Kurds are particularly significant because, with a population of around fifteen million, they account for nearly 20% of the total population. They are mainly located in the south-east of the country and extend into other states in the region (Yildirim, 2025). One of the leading Kurdish separatist groups in Türkiye over recent decades has been the Kurdistan Workers' Party (PKK), although this group has recently decided to disarm and disband. With the creation of the National Commission for Solidarity, Brotherhood and Democracy, a space for negotiation has opened up to bring an end to violence and legal exceptionalism (Türkiye İnsan Hakları Davalarına Destek Projesi, İnsan Hakları İzleme Örgütü, Uluslararası Hukukçular Komisyonu, 2025: 5).

Returning to the timeline, the end of the Second World War left Türkiye within the sphere of American influence, from which it gradually distanced itself following the collapse of the USSR to establish itself as a regional actor with international characteristics. At the beginning of the 21st century, Türkiye's stance was one of optimism towards the US and the EU, but its estrangement from the Europeans led it to seek its own path (Erdoğan and Çolakoğlu, 2015: 703–704). During this period, Türkiye's evolution can be seen within its dual nature as both a pivot and a geopolitical actor; thus, the 'zero problems with neighbours' foreign policy is understood to correspond to the concept of a

pivot, in which the importance of its geography was oriented towards the interests of external actors (Davutoğlu, 2008: 80). However, since the mid-2010s, Türkiye's dual nature has shifted towards that of a geopolitically active actor, leading to a sense of self-perception and self-sufficiency, particularly after feeling abandoned by the West following the 2016 coup attempt. Similarly, Türkiye has proceeded to redefine its areas of sovereignty (Sánchez Tapia, 2024: 53–55). This conceptualisation could provide Türkiye with access to certain energy resources in the Mediterranean, should its aspirations regarding its exclusive economic zone (EEZ) be recognised internationally. In any case, its stance on the Cypriot and Libyan conflicts has a direct bearing on this crucial issue.

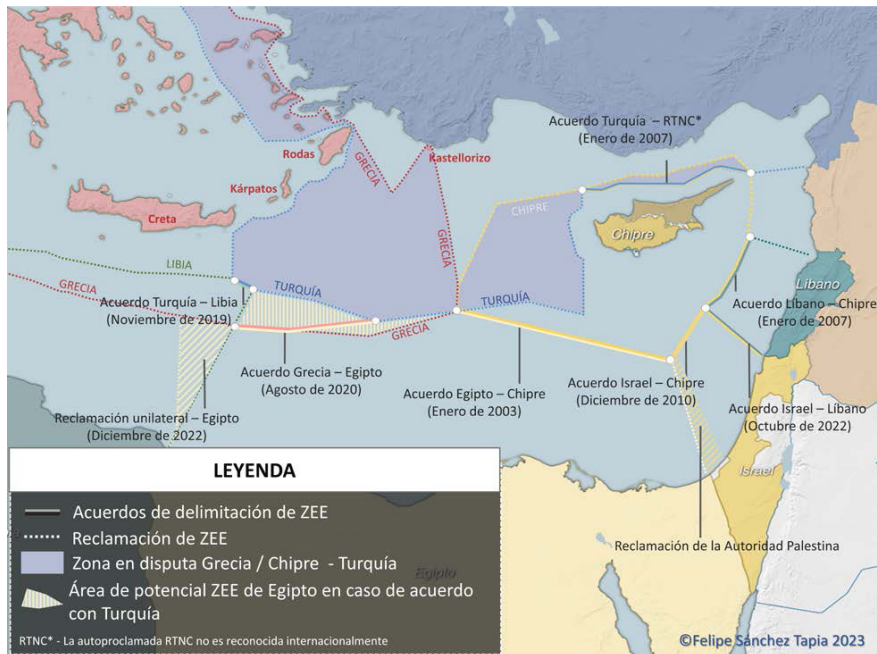


Figure 6. Agreements and claims in the eastern Mediterranean (Sánchez Tapia, 2024: 55)

Continuing with the energy theme, it must be borne in mind that Türkiye is the guarantor of the transport of a vast quantity of hydrocarbons through its network of oil and gas pipelines, connecting the two most important oil and gas basins on the planet to the Western world. Türkiye's privileged position makes it a sought-after strategic economic partner for both suppliers

and consumers. This situation has contributed to it experiencing the fastest growth in energy demand within the OECD over the last twenty years, making it one of the most important regional energy markets (Şafak, 2025: 2–3).

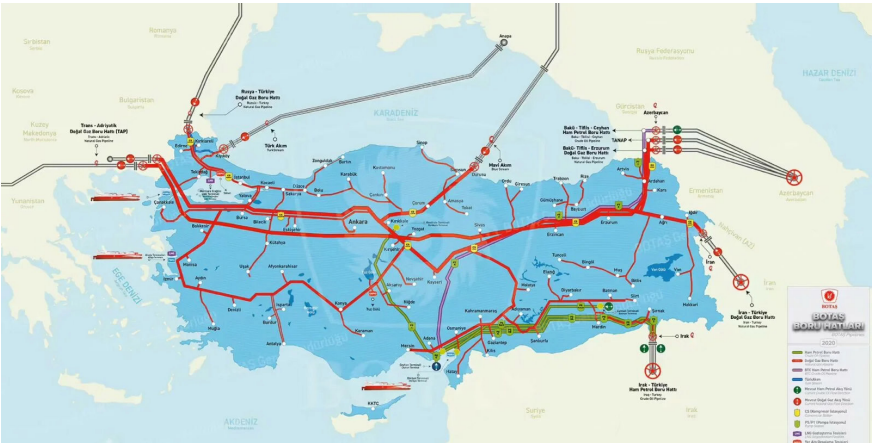


Figure 7. Potential of Turkish territory for hydrocarbon transport (Şafak, 2025)

2 The virtual circle of Turkish geopolitics: communities abroad

2.1 The OTS: a community beyond states

Türkiye extends as a geopolitical actor beyond the physical boundaries of its sovereign territories, encompassing an area of 4.5 million square kilometres, with a potential of four trillion USD, where some three hundred million people live. The commonalities among culturally related peoples, the pockets of Turkmen population that were left isolated following the fall of the Ottoman Empire, or, more recently, Turkish emigration to Western Europe, have created a community that transcends territorial concepts. At the international level, this translates into the virtual space of social groups and the constructivist relationships embodied by the Organisation of Turkic States (OTS). Within the organisation, alongside Türkiye, Azerbaijan, Kazakhstan, Kyrgyzstan and Uzbekistan participate. Although Turkmenistan is also a Turkic state, it participates only as an observer alongside Hungary and the controversial Turkish Republic of Northern Cyprus (Organisation of Turkic States, 2025).



Figure 8. Representation of OTS members and observers (Apa, 2025)

2.2 The special connection with Azerbaijan

Within this framework, relations between Azerbaijan and Türkiye are particularly close, as both are supporters of the concept *Bir millet, iki devlet* (one nation, two states), coined by the former Azerbaijani president, Heydar Aliyev (Ünalp, 2023: 184).

The many cultural, linguistic, historical and even religious similarities ensure that relations between the respective governments and communities are very fluid. This is evident from the fact that the Ottoman Empire recognised the Azerbaijani Republic in 1918 and that, during this first period of independence, the Ottomans signed various treaties of friendship, cooperation and protection. When the Soviet Union collapsed, Türkiye likewise recognised the Azerbaijani state and has since shown its support on sensitive issues such as the Nagorno-Karabakh conflict and relations with Armenia. The bond between the two nations was further strengthened by President Abulfaz Elchibey's Turkish identity and the numerous agreements signed with Elchibey himself and subsequently with Heydar Aliyev, which has led to an excellent relationship during İlham Aliyev's current term of office (Darici, 2024: 4315–4316).

2.3 Turkish emigration in Europe

In Western Europe, German Turks represent the largest community of foreign origin. The need for labour in Germany during

the 1960s led to agreements being signed with other countries for the arrival of 'guest workers' or *gastarbeiter*. Whilst initially only men came, by the mid-1960s they were permitted to bring their families with them. The settlement of ethnic Turks was not fully assimilated in Germany, leading to the creation of a Turkish community in the country that retains its distinct identity. At the turn of the century, German legislation began to allow the children and grandchildren of immigrants to acquire citizenship, as well as access to dual nationality following periods of residence or education (Nour, 2019).

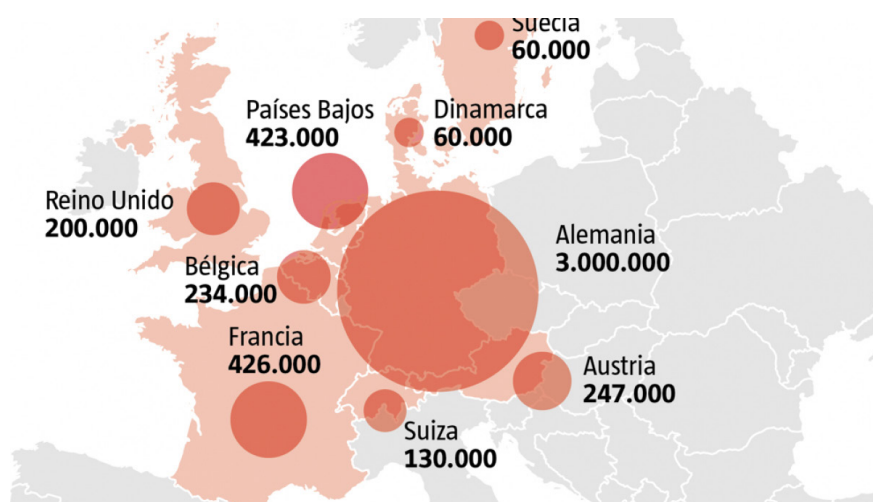


Figure 9. Communities of Turkish origin in Western Europe (Nour, 2019)

Of the three million people of Turkish origin living in Germany, approximately half have obtained German citizenship. This has been facilitated by dual citizenship policies, but also by the economic, political and social situation in Türkiye. In any case, despite naturalisation and after having lived in Germany for so many years, many of these new Germans of Turkish origin continue to regard Türkiye as their home (Ünveren, 2025).

The Balkans and Eastern Europe are also areas of interest for Turkish communities. Hungary, under the leadership of Prime Minister Victor Orban, uses its observer status in the OTS to expand its policy of *opening up to the East*, often referring to the Ural-Altaic origins of the Magyars. The narrative of 'neoturanism' serves to strengthen alliances of all kinds with Eastern countries, with a particular focus on Turkish-speaking

nations (Leiroz de Almeida, 2025). With regard to the Balkans, ties with the communities that remained within the orbit of the Ottoman Empire are still maintained and are reinforced by the pan-Balkan diaspora that has gradually settled in Türkiye (Mevludin, 2025).

3 Regional geopolitics in Türkiye's neighbourhood

Türkiye was compelled to assume its traditional responsibilities following the collapse of the former USSR. This left a series of territories in Eastern Europe and Central Asia where the Turks were called upon to reclaim their former spheres of influence. Similarly, this occurred with the power vacuum left in the Middle East, where there are also natural spheres of influence. However, the role of a geopolitically active player entails the need to act to ensure that the region stabilises in accordance with its interests (Sánchez Tapia, 2019: 130).



Figure 10. The 'Pentagon of Instability' surrounding Türkiye (Sánchez Tapia, 2019: 131)

3.1 The Aegean Sea and the Eastern Mediterranean

The position of the Turkish coastline provides significant influence over the eastern Mediterranean. So much so that the term *Mavi*

Vatan, or Blue Homeland, coined by Rear Admiral Cem Gürdeniz, has become a key reference in the defence of Turkish interests in this maritime region (Yapar, 2021: 9).

The situation between Greece and Türkiye has always been contentious due to the positioning of the Greek-controlled islands in the Aegean Sea, which lie very close to the Turkish coast. The Cyprus issue is another major stumbling block, which remains the subject of disputes even years after hostilities ended.

Linked to the above issue are the disagreements in the Eastern Mediterranean regarding the definition of the boundaries of their EEZs and continental shelves, where there are differences with the Egyptians and affinities with the Libyan government in Tripoli. However, Türkiye's role as a logistics and energy hub and Greece's position *vis-à-vis* Europe mean that both actors have a tendency towards cooperation. Hence, the pragmatic initiatives of leaders Mitsotakis and Erdoğan are understandable; although volatile, these led them to resolve their differences in 2024 (Dalay, 2025).

3.2 Connectivity in the Caucasus

Türkiye holds a dominant position across the entire South Caucasus region, which places it in a role as a balancing force in relations between Georgia, Armenia and Azerbaijan. The Baku-Tbilisi-Ceyhan pipeline is a shared asset that allows Azerbaijani oil to pass through Georgia, but which, were it not for Türkiye, could not reach the Mediterranean (Kalyuzhnova and Pomfret, 2021: 9–12). Thanks to this infrastructure, Israel receives, by sea and at competitive prices, a large proportion of the oil it consumes.

During the conflict between Armenia and Azerbaijan, the Turks backed their Azerbaijani partners, whilst Russia abandoned Armenia, which had aligned itself with the distant Atlanticist bloc. Following Azerbaijan's victory and the integration of the Nagorno-Karabakh region in 2024, Türkiye can serve as a link of continuity in the US initiative to establish a logistics corridor running from Azerbaijan through the Armenian Zangezur corridor to the Azerbaijani autonomous region of Nakhchivan, from where Türkiye can be accessed (Kocalar and Dilaver, 2024: 211–212).



Figure 11: Zangezur Corridor Initiative (Umarova, 2024)

3.3 Containing Iran and opening up to Iraq

The Kurdish question has been an issue that has united the countries concerned, as the Kurdish people have historically put pressure on all of them to achieve their aspirations. Following the fall of Saddam in Iraq, the strengthening of this cause brought Iran and Türkiye closer together (Türk and Golmohammadi, 2025: 8). It should also be borne in mind that relations between Iranians and Azeris tend to be competitive, which, given Türkiye's pro-Azeri stance, inclines it to side with its traditional partner. Türkiye's role, with its control over the transport routes of Iran's hydrocarbon infrastructure, eases tensions within the region whilst granting Türkiye a position of strength (Hidayat, 2025).

Whilst throughout 2025 Türkiye appeared in favour of reducing Iranian gas imports, it is returning to the traditional ties that lead it towards the Persian Gulf via these transport routes. Whereas in the past the Berlin-Baghdad-Basra route was the Ottoman Empire's preferred link, today modern Türkiye is promoting, along the same natural transport corridor, a road and a railway line from Basra to the Turkish border, known as the Iraq Development Corridor. This project offers an alternative to the Suez Canal route and is a distinct option from the Belt and Road Initiative and

the India-Middle East-European Union Corridor (IMEC) project (Buckland, 2025). Türkiye not only seeks to control the transport routes to the Gulf, but also exercises its power through the development of the Kirkuk-Ceyhan oil pipeline and the management of the waters of the Tigris River (Köroğlu, 2025).



Figure 12. Development Path Project (Caliskan, 2024)

3.4 Projection beyond the Levant and the 'geopolitical gateway'

Türkiye and Syria have a long-standing dispute over the waters of the Euphrates River, due to Türkiye's water project on the Anatolian peninsula. This situation intensified following the so-called Arab Spring due to Turkish support for the Syrian opposition and the territorial control of northern Syria by various groups considered terrorist organisations by Türkiye. The crisis triggered a massive wave of migration due to the *açık kapı politikası* or open-door policy, which affected both Türkiye and Europe (Doğan, 2022: 337–338).

Following the overthrow of the Assad regime and the establishment of Golani's new government, relations have shifted dramatically towards the natural ties dictated by geography, giving rise to the concept of the 'Geopolitical Gateway', where both countries form a hub of connectivity serving the entire Levant, the Persian Gulf and the Arabian Peninsula. It is therefore logical that, following the route of the Hejaz Railway, plans have begun to take shape for a new railway line extending from the existing

line between Aleppo and Gaziantep, running alongside the M-5 international motorway, to reach the Saudi hub of Qurayyet, near Jordan, and on to Dammam, on the Gulf (Kaddorah, 2025).

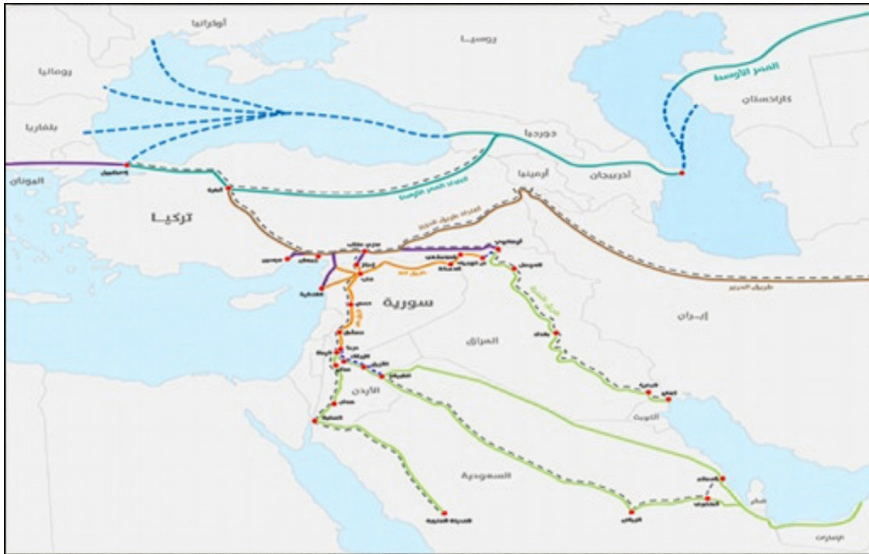


Figure 13. Proposed Syrian-Turkish access route to neighbouring regions (Kaddorah, 2025)

The concept of connectivity in the Geopolitical Gateway also encompasses hydrocarbons, particularly gas, which can reach the heart of Europe via Türkiye's energy hub.

Qatar is an important partner for Türkiye, with which it has maintained traditional relations of friendship and cooperation. Both share geopolitical interests and a very similar vision of Sunni Islam, based on the more moderate branches of the Muslim Brotherhood (The Cradle, 2025). Furthermore, the Qataris not only rely on the US and the UK for security matters, but the strong Turkish military presence on the peninsula is a guarantee of stability, which in turn is compensated for through financial and energy support (Cetinguc, 2025).

It is precisely in the energy sector that the 2009 project for gas transport via the *Qatar-Türkiye* pipeline—which the Assad regime and its Russian allies had brought to a standstill—has been revived. This infrastructure is set to connect with the Arab gas pipeline network, which runs from Jordan to Israel and Egypt, offering producers in the Eastern Mediterranean the possibility of

shipping their products via pipeline, thereby avoiding the need to liquefy and transport the gas by LNG tankers (Castro, 2025: 67). This would make Israel more geopolitically dependent, as it currently sources its oil from Azerbaijan via the Baku-Ceyhan pipeline, from where it is subsequently shipped primarily to the port of Ashkelon. For this reason, Türkiye could be a decisive player in the Israel-Palestine conflict, given its strong capacity to influence the parties involved (Turkish Minute, 2025).

This concept of a geopolitical gateway could be the key that definitively unlocks Türkiye's projection onto the African continent, reinforcing what has become known as *Stratejik Derinlik* or strategic depth (Davutoğlu, 2001: 206–208). It should be borne in mind that, via the Red Sea, Türkiye can occupy a significant position on the eastern African coast. Furthermore, Türkiye's support for the Libyan government in Tripoli not only allows it to extend the waters of its EEZ but also serves as another bridge for its entry into the northern part of the continent (Çelik, 2024).

4 Türkiye in the new global geopolitical order

Türkiye's geopolitical spheres are neither concentric nor physically bounded. Consequently, the following sections will address aspects of Türkiye's presence at greater distances than those previously discussed, as well as nearby issues that signify an involvement with major global actors or within the global geopolitical order.

4.1 Containing Russia and the dispute in the Black Sea

Russia is a power whose access to the sea is blocked, either by the vast Arctic ice sheet or by other states that restrict Russian maritime communications. Türkiye's privileged position is the key to Russia's access to the Mediterranean via its straits.

Russia's geopolitical orientation is to project itself southwards, consolidating its power in the Caucasus and the Black Sea. This runs counter to Turkish interests in establishing its own sphere of influence, so it can be said that there is a permanent contradiction, shaped by the circumstances of each moment. This tends to mean that, in confrontations over time, the power in a position of weakness suffers heavy losses and that both seek security

within an alliance. Similarly, neither is in favour of intervention in this sea by non-coastal states (Demir, 2019: 588–589). This explains Türkiye's position in the current Ukrainian conflict, in which it does not allow warships of any nationality to leave or pass through to the conflict zone, but in which it can play a role in blocking the passage of Russian merchant ships, including the oil tankers of the so-called 'ghost fleet' attempting to evade international sanctions against Russia for the invasion of Ukraine (Wilks and Fraser, 2025).

Türkiye perceives that, following Azerbaijan's victory in Nagorno-Karabakh, its position has been strengthened by the possibility of linking the Caspian and Black Seas, where the TANAP gas pipeline already exists as an alternative to the Russian Turkish Stream. Furthermore, a new east-west transport corridor would cut off Russia's natural projection southwards, where the North-South Transport Corridor (NSTC) is Russia's main asset for reaching the warm waters of the Indian Ocean via Iran, in order to reach India (Маржецкий, 2021).



Figure 14. The NSTC land corridor compared with the sea route from India (Ünver, 2023). Note that if the NSTC did not cross the Caucasus, it could do so via the Caspian Sea, which would require the establishment of multimodal transport hubs. If it were decided to route it through Central Asia, it could face opposition from Turkmenistan or the conflict in Afghanistan

4.2 China's Silk Road Bridge

The Turkish phrase that 'the world is bigger than five' aligns, at a discursive level, with the vision of a Chinese multipolar order, both challenging a Western-centred world that appears to be fading (Atlan, 2025). The positions of Türkiye and China in a new global order are historically aligned because they share the same traumatic vision of the 20th century. Currently, both have common interests, although this does not necessarily amount to strategic convergence. The Turks do not feel the need to choose sides, as unlike the old order, there is no extreme polarisation (Üngör, 2024).

However, Türkiye has ties to both worlds, so this rhetoric is tempered by the pragmatism of its membership of NATO as an alliance for security and stability against Russia or Greece, and by Türkiye's membership of multiple Western organisations. Relations between Turks and Chinese in this new environment are characterised by trade asymmetries; over-reliance on Belt and Road investments; cooperation in the arms industry; the issue of the Uyghur minority; and the repercussions of the disagreements between the US and China (Millî İstihbarat Akademisi, 2025: 49–56).

Although China has set its sights on Türkiye due to its Middle Corridor project for the Belt and Road Initiative, there are discrepancies between the two countries due to their differing visions of the Middle East, Africa and Central Asia. The disproportionate trade deficit and the project's targeted investments mean that Türkiye feels disadvantaged in this relationship. The Chinese are investing primarily in the development of transport infrastructure, but the Turks feel let down by the fruitless offers of joint production of consumer goods, particularly cars. Faced with such situations, Türkiye has had to employ measures such as imposing tariffs on China and liberalising tariffs on the US (Valansi, 2025).

One potential area of convergence could stem from Türkiye's progress in defence technologies, which could lead to a further increase in Turkish capabilities. However, this potential collaboration cannot be measured in purely commercial terms, as Türkiye's membership of NATO restricts the introduction of technologies from potential adversaries into the Alliance's defence systems (Üngör, 2025: 3–4).

4.3 The United States' foothold

Türkiye has a tendency towards neutrality which, since the Second World War, has allowed it to exercise a position of strength during crises such as the Iran-Iraq War or the Gulf Wars (Önal and Özdağ, 2016: 57). The Americans, who find themselves in the new global order facing China, need to deploy the bulk of their forces in the Asia-Pacific region to counter it. Türkiye's position as a regional power in the Middle East presents a win-win situation, with many US interests being managed by Turkish hands. Consequently, Türkiye's growing geopolitical influence is regarded as 'one of the most significant strategic developments of the 21st century' (Anasayfa, Haberler and Uluslararası İlişkiler ve Dış Politika, 2025).

Indeed, the Americans perceive Türkiye's geopolitical rise in a context where it holds an advantage over other actors, as Russia is exhausted by the conflict in Ukraine; Iran has lost its external influence and is mired in internal problems; and Israel is attempting to recover from the domestic and international challenges brought about by the Gaza conflict. However, the US needs to retain some element of control in order to exert pressure when it suits them.

Therefore, in the eyes of US adversaries and allies, the Turkish card is a strategic asset in a theatre of operations that has taken a back seat for the Americans. Türkiye can act as NATO's guarantor of security in the Black Sea, in the face of a Russia set to lose power in the region, whilst also serving as a valuable interlocutor with Ukraine. Similarly, within the framework of the Alliance, Türkiye and Poland are strengthening their relations to seek a stabilising environment in post-war Ukraine. Meanwhile, the Turks have established the so-called *Balkan Peace Platform*, which increases their power by completing an arc surrounding Russia's buffer zone, potentially allowing the Americans to disengage from the transatlantic link (Friedman and Bokhari, 2025).

Türkiye continues to maintain the security guarantees provided by US nuclear weapons during the Cold War. Under a bilateral agreement, it is estimated that some fifty B-61 nuclear bombs are deployed at the Incirlik base, although the details agreed upon regarding their possible use are unknown. This armament serves as a genuine deterrent to Russia, which watches with fear as, within a twenty-minute flight, NATO could use these weapons to strike Russian targets on the Black Sea coast.

In the Middle East, Türkiye's rise may serve as a guarantee in its bilateral relationship with the US, in exchange for a shift in its policies of support for the PKK Kurds, who have finally abandoned armed struggle (Kalkan Okur, 2025). Similarly, the Americans are attempting to appease and contain Türkiye in Syria by negotiating the support it has provided to the Kurdish YPG militias. The US intention is to integrate them into the weak coalition of Al Sharaa's interim government¹, but they wish to retain their own structures to guarantee their autonomy, which is why they also rely on Israel. Meanwhile, Daesh has re-emerged in territories where a power vacuum has been created (Aftandilian, 2025; Hussein, 2025).

4.4 Competition in the face of India's rise

Türkiye and India see themselves as two emerging powers competing in a polycentric world, where major players have left power vacuums allowing them to expand across regions without having to align with major powers.

Türkiye's traditional stance in the Kashmir conflict has been one of support for Pakistan, whilst India has supported interests opposed to Türkiye in the Cyprus and Armenia-Azerbaijan conflicts. These confrontations have been played out in the political sphere through the establishment of strategic relations and visits by leaders from the various regions, but they have also been played out in the military sphere through collaboration and arms sales. Just as India has been a major supplier of arms to Armenia in the Nagorno-Karabakh conflict, Türkiye is the second-largest supplier of arms to Pakistan (Kerem Tuncel, 2025).

However, political and military tensions are merely the tip of the iceberg in a geoeconomic competition over transport logistics corridors across the vast expanse of the Eurasian continent. India, which is also in competition with China, has interests that diverge from those of China's Belt and Road Initiative. For this reason, in September 2023 it launched its *India-Middle East-European Union Corridor* (IMEC) initiative. This sea-land transport route would link the port of Mumbai with the ports of the United Arab Emirates and from there would travel overland across the Arabian Peninsula to reach the Mediterranean at the Israeli port of Haifa. From there, it would once again travel by sea to reach the ports of southern Europe (Das, 2024: 36–38).

¹ Abu Mohamed al-Golani changed his *nom de guerre* to Ahmed Hussein al-Sharaa.

The IMEC initiative, which is on a collision course with the central corridor of China's Belt and Road Initiative, would leave Türkiye out of the equation, relegating its prospects as a Eurasian logistics hub. It also clashes with the aforementioned Turkish Iraq Development Corridor project (Bonifazi, 2024: 11; Öztürk, 2024: 7).

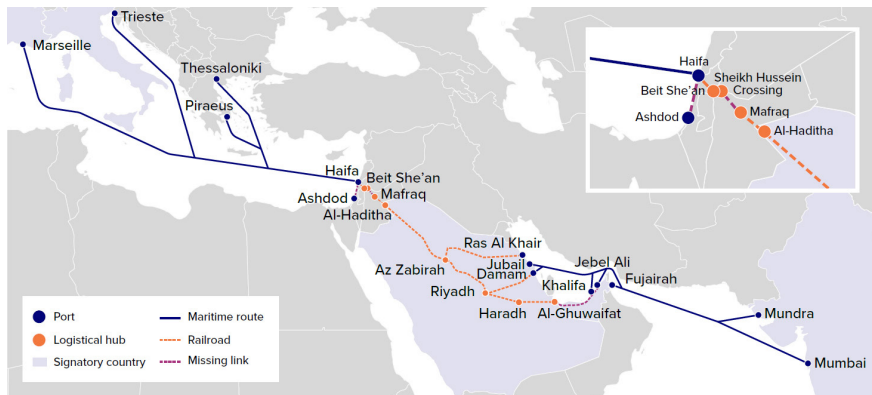


Figure 15. Proposed route of the corridor (Hussain and Shafer, 2025)

To a lesser extent, there is competition between the NSTC Corridor and the Persian Gulf–Black Sea Corridor. The former aims to connect Russia with Azerbaijan and Iran, and ultimately reach India by sea. The latter aims to replace Azerbaijan with Armenia, and it is possible that India may promote it as a means of exerting pressure on Azerbaijan for supporting Pakistan (Conzato, 2024).

Conclusions and outlook

Türkiye's geographical position will always place it in a position of significance in the global context, regardless of who its main actors may be. The timeline of history demonstrates this, and it remains true today. However, the role played by the territory of present-day Türkiye varies greatly depending on the circumstances of the society inhabiting it. This explains the dual nature of Türkiye as both a pivot and a geopolitical actor: when its society is assertive, it tends to be a power and to influence its surroundings, but in times of internal crisis it loses its status as a power and adopts a more passive stance. The existence of these two impulses is often exploited by major geopolitically active players, who seek to use Türkiye in accordance with their own particular geopolitical visions.

The Atlanticist thalassocratic vision aligns with the new global order of the United States and its allies, who would seek to use Türkiye to contain the expansion of the central corridor of China's Belt and Road Initiative. At the same time, they hold a vision similar to that of the Cold War regarding the containment of Russian power towards the south. This vision also includes the possibility of Türkiye acting as a guarantor of US interests in the region, thereby allowing the US to reduce its footprint in the area to focus on the Indo-Pacific region.

China views Türkiye as a land bridge through which its goods can flow towards Europe, whilst also representing a market opportunity. This would entail an unequal relationship in which Chinese investment would be directed specifically towards the development of transport infrastructure, leaving other industrial investments—which could be the very ones to foster greater business and technological growth in Türkiye—in the background.

Western and Eastern Europe have their own vision within the context of their alliance with the Americans. They also view Türkiye as a bridge, but in this case energy is the primary driving force. The linking of the Caspian, Black and Mediterranean Seas, and even the possibility of reaching the Baltic, would greatly benefit the countries at the heart of Europe. Another benefit that Europeans see in Türkiye is the containment of the Russian threat; the more Russia has to deal with the Turks, the less it will have to deal with the Europeans.

For its part, Russia, as a tellurocratic power, will always view Türkiye as an obstacle to its access to open waters to the south. This applies not only to control of the Turkish straits, but also to Turkish transport initiatives that might compete with its north-south transport corridor. Furthermore, Türkiye's ability to stabilise the Black Sea and the Caucasus may be viewed by Russia as a constraint on its power in both regions.

Finally, India views Türkiye as a potential rival to its geopolitical ambitions, as the land bridge position that benefits other actors does not serve its interests. Consequently, it has its own vision of the communication routes that should traverse the vast Eurasian continent, which runs counter to the initiatives and projects in which Türkiye might participate.

All the above perspectives tend to view Türkiye as a geopolitical pivot. However, Türkiye has the potential to act as a major player in the new international order, which could be beneficial not only

for the Turkish people themselves, but also for many of the countries or territories over which it can exert its influence.

Without disregarding the views of other major players, Türkiye has the capacity to position itself as a significant power on the global stage. The country possesses a territory significant enough to be considered a communication route acting as a double hinge, both north-south and east-west. Furthermore, Turkish territory serves as a bulwark against neighbouring areas more prone to disintegration, such as Mesopotamia and the Levant, as well as the South Caucasus.

Another of Türkiye's strengths is its population, not only because it possesses sufficient critical mass within its own national territory, but also because the traditional Turkic peoples and the 20th-century Turkish diaspora constitute a community with distinct identity markers and considerable influence both within and outside Türkiye itself. This population has, moreover, proven to be hard-working and imaginative, as evidenced by its cultural and scientific development.

It could be argued that Türkiye's territory possesses certain natural resources, particularly water resources, which enable it to be self-sufficient. However, this is not the case with regard to hydrocarbon-based energy products. Despite this, this shortfall can be easily overcome because Türkiye is situated between the world's most important oil and gas basins. This position enables it to serve as the energy hub for the whole of Eurasia, meaning it could also become a major power in energy resources due to its location.

These qualities, combined with the dynamism of Türkiye's current population, place the country in a privileged position amongst the powers of the emerging new global order. Any action leading to a pro-Turkish stance is highly likely to yield benefits and secure an ally across multiple scenarios on the vast Eurasian and African continent.

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Chapter Three

Türkiye and its internal security: insurgency, terrorism and cyberspace

Manuel J. Gazapo Lapayese

Abstract

Türkiye, or Türkiye, by virtue of its geostrategic position, is a regional power that faces threats of various kinds. Its ability to project power and exert influence depends on the stability of its internal security. From the failed coup of 2016 to the present day, Ankara has reorganised its security architecture, shifting towards a hyper-presidentialist model that identifies three interconnected strategic threats: the PKK, Daesh and cyberspace. The PKK presents itself as an endemic conflict whose violent insurgency has justified both internal militarisation and military projection into Syria and Iraq, and whose announcement of dissolution in 2025 opens up a post-conflict scenario fraught with uncertainties. Daesh's Salafist-jihadist terrorism persists as a decentralised phenomenon capable of undermining the entire state security apparatus. The latest attacks and recent arrests demonstrate that the threat continues to evolve. Cyberspace is emerging as a central domain that amplifies traditional threats and creates new challenges for national unity. An analysis of these threats suggests that Erdoğan's Türkiye has significantly strengthened its operational and technological capabilities, but warns that permanent

securitisation, democratic deficits and the absence of substantive political solutions may, in the medium and long term, reproduce the very threats that the state seeks to neutralise.

Keywords

Türkiye, Erdoğan, Security, Terrorism, Cyberspace.

Introduction

Türkiye—hereinafter Türkiye, in reference to the country's new official name at the United Nations—is a middle power with aspirations to be a global actor. This Eurasian country is a unique geopolitical player whose international position cannot be understood without considering its internal security. Situated at the strategic crossroads of Europe, the Middle East, the Caucasus and the Eastern Mediterranean, Türkiye controls the Bosphorus Strait and acts as an external border for both NATO and the European Union (Pierini and Siccardi, 2025). With a population of over 85 million, armed forces among the largest in the world and an economy ranked among the twenty largest on the planet, Ankara projects influence as an emerging regional power and as a diplomatic intermediary between East and West. However, this capacity for external projection is deeply conditioned by internal dynamics.

In Türkiye, the endogenous and the exogenous, the domestic and the international, are not separate spheres, but dimensions that constantly feed into one another. In this sense, Ankara's ability to act as a regional power is intrinsically linked to the stability of its domestic front. It is therefore vital to understand that, for over a decade, Türkiye's internal security has not been an isolated issue, but the pillar upon which its regional geopolitical role and global aspirations rest (Mourenza, 2025).

Following the failed *coup d'état* of 2016, Recep Tayyip Erdoğan purged government institutions, reorganised the state structure and opted for a system of power characterised by hyper-presidentialism (Cerbone, 2021). Ten years on, domestically the fear is no longer of a new military coup, but of a terrorist attack in Istanbul, a cyberattack on the TANAP gas pipeline, or a demonstration that social media manages to turn into a riot.

Therefore, in the midst of 2026, it can be stated that Türkiye's ability to project its power regionally depends on its capacity to contain the three risks it considers primary in its strategic documents: firstly, the structural threat associated with the violent insurgency of the Kurdistan Workers' Party (PKK); secondly, the Salafist-jihadist terrorism of Daesh; and, thirdly, the hybrid warfare waged in cyberspace through disinformation campaigns and cyberattacks on critical infrastructure.

Government perspective: three strategic documents

Between 2016 and 2026, the Turkish perception of the internal threat has undergone a qualitative transformation that does not alter the range of risks, but does change their prioritisation, their doctrinal treatment and the instruments employed to contain them. An analysis of official Turkish strategic documentation from the Ministry of the Interior, the National Security Council and the National Cybersecurity Strategy reveals the following underlying ideas:

Firstly, according to the National Security Council, terrorism constitutes the main existential threat to state security, internal stability and national unity (R. T. National Security Council, 2025a). This body emphasises that groups linked to FETÖ (Bayrakli *et al.*, 2018), the Kurdish militias of the People's Protection Units or YPG (Malet *et al.*, 2025), the PKK or Daesh carry out attacks with very serious and severe consequences for the country's internal stability. Furthermore, a detailed analysis of the communications archive available on the website of the General Secretariat of the National Security Council reveals that, during 2024 and 2025, an increasing number of concerning references have been included regarding information warfare (Espona, 2023), digital manipulation and cyberspace. The latter is of particular interest in the authorities' security analyses, as it is interpreted as a target for attack, a vector for destabilisation, and a threat to critical infrastructure and public order. In the most recent communiqués, cyberspace is no longer treated solely as a technical matter, but is managed as an issue that cuts across all aspects of state security, as it is linked to problems such as disinformation, sabotage, attacks on critical infrastructure, and terrorism itself in its many forms and dimensions.

'The Council was briefed on activities carried out against all threats and dangers to our national unity, primarily from the terrorist organisations PKK/KCK-PYD/YPG, FETÖ and ISIS [...] in line with the objective of a "Türkiye free from terrorism", multidimensional efforts aimed at the complete and permanent eradication of terrorism and the strengthening of our national unity and solidarity were discussed; it was emphasised that there is no place for any manifestation of terrorism and violence in the future of our region' (R. T. National Security Council, 2025b).

Secondly, according to the 2024–2028 Strategic Plan (R. T. Ministry of the Interior, 2024), internal security is simultaneously affected by the radical insurgency of the PKK, by Daesh terrorism, and by threats originating in cyberspace—a dimension that influences the stability of public order and the control of information. This institutional document states that Ankara does not view the terrorist threat as residual, but rather as a structural factor that shapes the territorial and logistical organisation of the state. Furthermore, they understand that terrorism is not an isolated phenomenon, but one permeated by developments in the digital, social and informational spheres. The Ministry's text states that the State operates simultaneously in the terrestrial domain (*Kara Vatan*), the maritime domain (*Mavi Vatan*) and cyberspace (*Siber Vatan*) to ensure that none of these threats escapes its control and risk management.

'The Ministry of the Interior, in line with the vision of "Peace in Türkiye", carries out its work day and night with great conviction, determination and resolve to ensure the tranquillity and security of our country, with 600,000 personnel deployed in the Land Homeland, the Blue Homeland and the Cyber Homeland' (R.T. Ministry of the Interior, 2024: 9).

Thirdly, according to the National Cybersecurity Strategy 2024–2028 (R.T. Ministry of Transport and Infrastructure, 2024), the digital ecosystem that constitutes cyberspace is established as a threat in itself and, simultaneously, as a cross-cutting multiplier of all risks affecting Türkiye's internal security. The text warns of the destabilising power of cyber threats, highlighting not only their capacity to cause casualties, but also their potential to erode state authority, fracture social cohesion and influence political decision-making. In this context, a Daesh attack may cause a momentary shock, but a sustained digital campaign questioning the competence or legitimacy of the government can produce far more lasting systemic effects.

This shift in focus explains the passing of Law No. 7545, known as the Cybersecurity Act of 2025 (Republic of Türkiye, 2025), which significantly expands the scope of state intervention in the information sphere. By criminalising the dissemination of information deemed false regarding leaks or failures in critical infrastructure, and by empowering the Information and Communication Technologies Authority (*Bilgi Teknolojileri ve İletişim Kurumu — BTK*) to block platforms without a court order in the event of a threat to national public security, Ankara institutionalises a view

of cyberspace as a priority internal front, comparable to traditional security scenarios.

Government perspective: three strategic threats

From the conceptual and regulatory framework established by the three government documents referenced, the following converging ideas emerge: regarding the PKK, despite recent declarations of abandoning armed struggle in certain contexts, it does not cease to be a strategic threat. From the Turkish institutional perspective, the criterion for assessment is not political discourse, but rather residual capacity, cross-border reach and the persistence of an organisational ecosystem that continues to be perceived as a direct challenge to national unity and the survival of the state (*beka*). The continuity between the domestic sphere and the Syrian-Iraqi theatres reinforces the view of the PKK as a structural threat, one that may vary in intensity but is unlikely to disappear. Hence, Ankara maintains a logic of permanent containment—internal operations, external military projection, ISR surveillance (Nieto and Mateo, 2014) and sustained pressure on safe havens—consistent with the idea that the risk can adapt and retreat, but not be extinguished (CFR, 2025).

With regard to jihadist terrorism, it is stated that Daesh occupies a specific and distinct place within the threat architecture due to the high symbolic and psychological value of its attacks. The dismantling in 2024 of a cell planning an attack on Ankara's central station on Republic Day; the January 2025 attack on the Church of St Mary in Istanbul; the arrest of over a hundred Daesh suspects in simultaneous nationwide raids in December 2025; and the counter-terrorism operation carried out in Yalova (Ferreira, 2025) just days before the start of 2026, confirm the persistence of self-radicalised actors and the expansion of micro-cells capable of autonomous action. These incidents reinforce the state's perception that jihadism has not been defeated, but rather decentralised, shifting towards less visible and more unpredictable forms (Tuysuz and Tawfeeq, 2025).

With regard to cyberspace, the centrality of the digital domain does not replace traditional threats, but rather reconfigures and amplifies them, turning it into the vector through which these threats can multiply their impact.

Taken together, the convergence of these three threats—the PKK, jihadist terrorism and cyberspace—is neither accidental nor

circumstantial. Turkish security policy not only identifies these risks as priorities, but treats them as interdependent; they constitute the core of Türkiye's perception of internal risk towards 2026 and beyond. The PKK represents the structural and territorial threat; jihadism, episodic violence with high symbolic impact; and cyberspace, the cross-cutting multiplier that allows both to erode state stability without the need for physical control of the territory.

Given the certainty that Türkiye is a paradigmatic case of how internal security shapes the future of a regional power's strategic projection beyond its immediate borders, the following analysis examines the three threats and their disruptive effects on the country's development.

1 The PKK: the present and future of Türkiye's endemic conflict

The Kurdistan Workers' Party (PKK) has, for over forty years, been the main threat to Turkish internal security (Robinson, 2023). This Kurdish insurgency, which began in 1984, made the Kurdish question a central issue on Türkiye's political and security agenda. The conflict has claimed the lives of more than forty thousand people since the 1980s (ICG, 2025), leading to a militarisation of the state in which the Armed Forces and the intelligence services (MIT) assumed a leading role and justified exceptional measures in the name of national unity. Over a decade ago, Ankara officially designated the PKK as a terrorist organisation and as the main threat to the country's integrity (Ministry of Foreign Affairs, 2025). The fight against the PKK has shaped Turkish military doctrine and continues to influence its foreign policy to this day.

The legacy of this protracted conflict, which has marked and affected numerous generations, entails profound challenges to security and governance. The ongoing military campaigns and the imposition of emergency states for years in south-eastern Anatolia eroded trust in institutions and strained social cohesion. The Turkish state, under the constitutional principle of an indivisible homeland, long restricted the cultural and linguistic rights of the Kurdish minority in the name of national unity.

'The Kurds are estimated to number around 30 million and are widely regarded as the largest group of stateless people in the world. [...] The Kurds do not have a single common language, but the most widely spoken Kurdish dialect.

[...] Likewise, the Kurds do not share a common religion. Most are Sunni Muslims. [...] Other Kurds follow Alevism, an unorthodox form of Shi'ite Islam, as well as the indigenous Kurdish faith of Yezidism. There are small communities of Kurdish Jews, Christians and Baha'is [...] From the outset, expressions of Kurdish identity were discouraged, and the Kurds were compelled to behave in accordance with the norms of the countries in which they now found themselves. In time, military incursions into Kurdish regions became commonplace, with comprehensive attempts made to forcibly dismantle Kurdish networks in border areas and eradicate the notion of a distinct Kurdish identity' (Yildiz and Muller, 2008: 4).

This approach of prioritising state security over human rights has been the subject of harsh international criticism: the persecution of pro-Kurdish politicians, the banning of parties, the imprisonment of leaders of the Peoples' Democratic Party (HDP) and the systematic replacement of elected mayors with state administrators illustrate a drift that prioritises stability over democracy (U.S. Department of State, 2022). International observers note that Türkiye has experienced a profound democratic regression, evidenced by Freedom House's (2023) classification of the country as 'not free' since 2018, attributed in part to the protracted internal conflict and the political exploitation of this conflict to strengthen executive power¹.

1.1 Transnational dimensions and the strategy of externalisation

Despite periods of ceasefire and negotiations in the past, the Kurdish insurgency has not disappeared; on the contrary, its transnational nature forces Ankara to operate in a complex theatre that combines internal and external dimensions: on the one hand, the PKK retains the capacity to carry out sporadic attacks within Türkiye, particularly in the predominantly Kurdish

¹ See: Freedom House (2023), *Freedom in the World 2023*, which assesses the situation in Türkiye: 'Türkiye. Not Free: Political Rights 16/40. Civil Liberties 16/60. Last Year's Score Status: 32/100. Overview: President Recep Tayyip Erdoğan and his Justice and Development Party (AKP), which have ruled Türkiye since 2002, have become increasingly authoritarian in recent years, consolidating significant power through constitutional changes and by imprisoning opponents and critics. A deepening economic crisis and the upcoming elections in 2023 have given the government new incentives to suppress dissent and limit public discourse'.

provinces of the south-east, although it has also carried out terrorist attacks in major cities when it has been able to do so. Turkish and Western intelligence reports indicate that the PKK has historically been responsible for more than forty thousand deaths since 1984 (CFR, 2025), illustrating the enormous human cost and the persistence of this threat. Even as recently as 2023 and 2024, deadly attacks attributed to the PKK or linked factions shook Türkiye. One example showing that the danger persists despite military pressure is the suicide attack outside the Ministry of the Interior in October 2023 (RTVE, 2023).

Furthermore, Ankara has externalised the Kurdish conflict beyond its borders. The bulk of its logistical infrastructure and safe havens are located outside Turkish territory: in the mountains of northern Iraq, in the Kandil region, and in areas under Kurdish control in northern Syria. This duality enables Türkiye to justify and carry out military operations beyond its borders as part of its security strategy. Since 2016, there have been a series of operations such as Euphrates Shield (2016–2017), Olive Branch (2018), Peace Spring (2019) and the most recent in the Claw (*Pençe*) series on Iraqi territory. All these military operations and interventions were aimed at striking Syrian Kurdish militias allied with the PKK, such as the People's Protection Units (YPG), and at combating the remaining pockets of Daesh along the Syrian-Iraqi border.

Ankara's strategic view is that allowing the emergence of an autonomous armed Kurdish entity in Syria or Iraq would pose an existential threat to its security, by fuelling separatist aspirations within its own territory. Erdoğan has reiterated on numerous occasions that they will not allow the creation of a 'terrorist corridor on their southern border' (Euronews, 2016), emphasising that Türkiye will support the Damascus government to prevent a hypothetical fragmentation of Syria from benefiting the PKK/YPG (SWI, 2025b). This firm stance explains the continued Turkish military presence beyond its borders: today, Turkish contingents remain deployed in a security buffer zone approximately 30 km deep in northern Syria. This buffer zone allows Erdoğan's forces to control the territory stretching between Afrin, Jarabulus and Ras al-Ain. Similarly, Ankara maintains dozens of bases in Iraqi Kurdistan, from which it harasses PKK militants.

With regard to these deployments, it should be noted that, although Türkiye's Western allies formally recognise the PKK as a terrorist organisation, the international community has expressed concern over these unilateral interventions, which the

Erdoğan government defends as legitimate preventive self-defence against terrorism (European Commission, 2016).

1.2 The 2025 peace announcement and its uncertainties

The year 2025 marked a milestone in this endemic conflict. In May, during an extraordinary congress, the PKK announced the definitive cessation of armed struggle and the dissolution of its military structure, in response to a historic call from its imprisoned leader Abdullah Öcalan. This decision, taken at its 12th Congress, brought an end to forty years of open insurgency. In October, PKK militants began withdrawing from Turkish territory to their strongholds in northern Iraq, staging symbolic disarmament ceremonies (Al Jazeera, 2025b). President Erdoğan, who in 2024 launched the 'Terrorism-free Türkiye' project, described the moment as 'a new chapter in history', acknowledging the significance of the peace achieved and celebrating that 'a powerful country is freeing itself from terrorism' (Reuters, 2025).

'The 'Terror-free Türkiye' project aims to transform the Turkish political landscape at two distinct levels. At the national level, it seeks to "consolidate the national front", as explained by Turkish officials. The main objective of the project is to eliminate one of the most active political fault lines in the country: the Kurdish issue. At the regional level, it aims to eradicate terrorism from the Middle East to create a terror-free region, as the PKK and its affiliates are active not only in Türkiye but in several neighbouring countries' (Ataman, 2025).

However, the post-conflict period presents significant uncertainties. The PKK's transition from armed struggle to politics is taking place in a non-transparent manner and without open public debate, which is fuelling mistrust (Hamza and Toye, 2025). If the disarmament, demobilisation and reintegration (DDR) process is not managed inclusively and with respect for transitional justice, there are latent risks that could erupt at any moment: the fragmentation of the Kurdish movement, the emergence of dissident factions, or security vacuums in south-eastern Anatolia that could be exploited by other violent groups. International analysts warn that, without transparency or public participation, this opportunity for peace could be squandered and 'replicate past failures, leading to a return to violence' (Cahid, 2025). Furthermore, there are loose ends on the regional chessboard: influence over the

Kurdish militias in Syria and the Turkish state's response regarding political reforms. The PKK has made its dissolution conditional on concrete steps by Ankara—amnesties, guarantees for Kurdish democratic participation, improvements in Öcalan's prison conditions—which have yet to materialise (Al Jazeera, 2025a).

In short, although the armed conflict with the PKK appears to be drawing to a close, Türkiye's challenge for 2026 and the coming years will be to consolidate a lasting peace that addresses the underlying political causes, preserves security without excessive militarisation, and strengthens cohesion between Turks and Kurds after decades of mistrust.

2 Jihadist terrorism: Daesh in the Turkish security landscape

The threat of jihadist terrorism in Türkiye intensified with the Syrian civil war and the emergence of Daesh in 2014. Due to its geographical position bordering Syria and Iraq, Türkiye became both a target for attacks and a transit country for thousands of foreign fighters who joined Abu Bakr al-Baghdadi (Neuman *et al.*, 2025). Between 2015 and 2017, members of the organisation carried out large-scale terrorist attacks on Turkish soil. Among the most serious were the double suicide bombing in Ankara in October 2015, which left 103 people dead—the worst terrorist massacre in Türkiye's recent history—and several attacks in Istanbul against tourist areas and critical infrastructure, notably the attack at Atatürk International Airport in June 2016, which left 45 people dead. These actions demonstrated jihadism's ability to strike anywhere within urban areas, sowing panic and instilling uncertainty and instability in national life.

Initially, Ankara was reluctant to openly confront Daesh because its strategic priorities lay elsewhere: the Syrian regime and the Kurds carried greater weight in its strategic calculations. However, after coming under direct attack in 2015, Türkiye drastically altered its stance. In July 2015, the Turkish government authorised the use of the Incirlik airbase by the US-led international coalition against Daesh, and shortly afterwards launched its own counter-terrorism operations. Operation Euphrates Shield (2016–2017) marked Türkiye's first direct military deployment in Syria against Daesh targets, succeeding in driving the radical militants out of key border enclaves such as Jarabulus and Al-Bab, among others. During that campaign, Turkish forces neutralised more than two thousand jihadist fighters, demonstrating Ankara's

commitment to dismantling the territorial caliphate of the terrorist organisation that claimed responsibility for its attacks via Amaq News Agency and Al Hayat Media Center (Hasnain, 2019).

Since then, Türkiye has maintained constant pressure on jihadist networks within its territory: the police and the *Millî İstihbarat Teşkilatı* (MİT, National Intelligence Organisation) have arrested hundreds of suspects, dismantling both sleeper cells and logistical networks for recruitment and financing. At the international level (U.S. Department of State, 2025), Türkiye cooperates closely with Western allies—including its European partners—exchanging intelligence for the early detection of international terrorists and returnees. In this regard, two examples are worth noting: firstly, that the European Commission and the Erdoğan government hold regular high-level dialogues on migration and security, during which they work intensively on cooperation in the fight against terrorism and organised crime (SWI, 2023). And, secondly, within the framework of the global coalition against Daesh, Turkish and Spanish security forces have actively collaborated (Spanish Department of National Security, 2016) in the identification and arrest of jihadists with transnational connections (Presidency of the Government of Spain, 2018).

2.1 Recruitment networks and the jihadist highway

A detailed analysis of Daesh recruitment networks within Türkiye reveals clandestine infrastructures that have been built up since 2014. These networks were not limited to recruiting sympathisers; they also established safe houses, transit routes to Syria, informal *hawala* financing systems (El Qorchi, Munzele and Wilson, 2025) and covert indoctrination centres. These were flexible networks, with autonomous nodes embedded in marginalised communities where the state had a limited presence. ‘Content promoters’ (Gazapo, 2018), recruiters and recruiters used unofficial mosques, libraries, sports centres, charitable associations and religious study circles to identify vulnerable young people: the unemployed, internally displaced persons, immigrants, refugees or individuals with low social, cultural and economic integration. The European Parliament’s report *The financing of the Islamic State in Iraq and Syria (ISIS)* highlighted this network of actors facilitating payments and arms sales to Daesh via Türkiye:

‘The Iraqi Central Bank took action by establishing a black-list of 142 exchange offices suspected of allowing IS money

to flow throughout territory under its control. According to an investigative report published by the Wall Street Journal, three primary routes are used for such money transfers, two of which are in Türkiye and another in Jordan. International organisations are striving to neutralise such sources of financing, which often transfer funds through small-denomination banknotes [...] IS forces source most of the products used in the manufacture of weapons and ammunition from the Turkish domestic market. CAR's findings continually reinforce evidence that the group operates a major procurement network in Türkiye and has a direct supply line from Türkiye, through Syria, to the Mosul area' (European Parliament, 2017: 11–15).

It is worth noting that Şanlıurfa and other border towns in south-eastern Türkiye became key logistical hubs for these jihadist recruitment networks due to their proximity to the border crossings with Syria, their diverse population, and Ankara's inability to assert the state's monopoly on the use of force in the region. Caravans set off from these cities, documents were forged, and funds were channelled to areas controlled by Daesh. The Turkish state's institutional permissiveness during 2014 and 2015, focused at the time on overthrowing Assad and containing the PKK, allowed Daesh to consolidate structures that would later prove extremely difficult to destroy: 'The Islamic State has also cultivated looser networks of cells, operatives, and sympathisers in Europe, Asia, Africa, and the United States. Its networks in Türkiye facilitated the flow of fighters, weapons, resources and even oil exports' (USIP, 2017: 17).

Francesco Siccardi, deputy director of Carnegie Europe, the regional centre of the Carnegie Endowment for International Peace, explained in detail how Türkiye's initial policy towards Syria played a key—albeit unintended—role in Daesh's territorial and logistical expansion during the early years of the conflict. From 2011, Ankara adopted a strategy centred on the fall of Bashar al-Assad's regime. Under this approach, the Turkish government relaxed border controls to provide logistical and human support to Syrian opposition groups without making a clear distinction between moderate factions and radical Islamist insurgents (Siccardi, 2021). The Carnegie report details that this combination of permissiveness, relaxed border controls and the fragmentation of the Syrian insurgency facilitated the emergence of a jihadist highway connecting Europe, Türkiye and Syria.

Terrorism expert Kyle W. Orton (2017) concurs with this assessment and notes that between 2012 and 2014 thousands of foreign fighters used Turkish routes to enter areas controlled by Daesh, taking advantage of poorly guarded border crossings, smuggling networks and areas of fragile governance along the southern border. Türkiye did not act deliberately to favour Daesh, but it did create, through misguided strategic decisions, an operational environment in which the group was able to expand and consolidate its organisational structure. The boomerang effect of this policy became apparent between 2015 and 2017, when Türkiye suffered the aforementioned Daesh attacks in Ankara and Istanbul. These episodes, which represent the deadliest terrorist attacks in Türkiye's recent history, tragically revealed how the previous porous border and Türkiye's commitment to regime change in Syria had created conditions that were subsequently exploited by the jihadist organisation. The subsequent construction of the border wall, military reinforcement and doctrinal shifts in Turkish foreign policy became belated corrections to an initial phase marked by excessive permissiveness and an underestimation of the risk.

2.2 Returning fighters, domestic radicalisation and institutional counter-narratives

In 2020, the International Crisis Group (ICG) examined a critical dimension in depth: returning fighters. The think tank, currently led by Dr Comfort Ero, noted that Türkiye had to manage between five thousand and nine thousand citizens who, after fighting in the ranks of Daesh, had returned or attempted to return. The ICG highlighted that Ankara had improved the exchange of information and intelligence with its European allies, thereby managing to imprison hundreds of radicals and freeze financial assets. However, the report highlighted a structural limitation: the absence of deradicalisation and reintegration programmes. Türkiye had opted for a predominantly punitive approach, which could neutralise the threat in the short term but left unaddressed the risk that those released might reoffend or create new clandestine cells (ICG, 2020).

The ICG also warned of a geopolitical factor: hundreds of Turkish fighters who had sworn allegiance to Daesh were being held in prisons in northern Syria, under Kurdish control. As Türkiye did not cooperate with these militias, their future was uncertain:

if a new conflict broke out, many could escape and reactivate cross-border networks.

‘Türkiye has to deal with thousands of citizens who travelled to join ISIS and have now returned. Of the few convicted, many will soon be released from prison. Others are under surveillance. The fate of the rest is unclear [...] At the same time, Turkish state institutions have only recently begun to consider what they call “deradicalisation” or “rehabilitation” efforts—broadly speaking, policies designed to steer former militants away from jihadist ideology and violence. For the most part, the authorities rely on surveillance—monitoring those they believe may pose a threat—combined with short-term detentions designed to deter anyone they think is on the verge of joining militant circles from doing so’ (ICG, 2020).

According to the Institute for Economics & Peace’s Global Terrorism Index, Türkiye ranks 32nd among the countries most affected by the threat of terrorism. Although far from the levels of impact reached at the peak of violence in the mid-2010s, the country under Erdoğan’s control still occupies a worrying position, being among the group of countries significantly affected by terrorism (IEP, 2025). In other words, the jihadist threat has diminished in intensity, but it has not disappeared. The events of 2025 confirm this assessment: on 16 April 2025, Interior Minister Ali Yerlikaya announced the arrest of 89 suspects linked to Daesh in coordinated operations across seventeen provinces, including Istanbul; a few months later, between 5 and 12 September 2025, the authorities reported a new crackdown that resulted in 161 arrests across 38 provinces, with weapons, documents and digital material belonging to the group being seized (Xinhua News, 2025). These figures show that the Turkish state continues to face an active jihadist network and that Salafist terrorism remains a central concern in internal security assessments.

Domestic radicalisation constitutes another major concern. Various studies indicate that more than 2,100 Turkish citizens joined jihadist groups in Syria or Iraq as foreign fighters, highlighting an internal breeding ground that has neither been managed nor neutralised by Erdoğan or the MİT (Bingol, 2023). Against this backdrop, the authorities have launched counter-narrative campaigns through the *Diyanet İşleri Başkanlığı* (Presidency of Religious Affairs) to promote a moderate Sunni Islam, with the aim of discrediting Salafist ideology and offering an alternative identity framework for vulnerable young people. However, experts

in this field such as Ihsan Yılmaz and Ismail Albayrak warn that this counter-narrative may fail if it is reactive and politicised. The political instrumentalisation of religion erodes its legitimacy and generates rejection, particularly among Kurdish, Alevi or secularist minorities. When a state combats extremism solely by tightening coercion or manipulating official religiosity, it runs the risk of fuelling further radicalisation. Furthermore, prison overcrowding following the 2016 purges raises fears that prisons will become breeding grounds for extremism if effective deradicalisation programmes are not implemented.

‘The AKP, with the help of Diyanet, merged the concepts of democracy and jihad. Thus, it is no surprise that Erdoğan has called the failed coup “a gift from God”. [...] The events have allowed him to strengthen his conspiracy-laden narrative with the aid of the “divine” authentication of the narrative by Diyanet [...] Diyanet and the AKP evolved and moved towards Islamism and authoritarianism together. By strategising a congenial relationship between politics and religious rhetoric, the state and the mosque have transitioned from promoters of Islamic democratic conservatism to outright Islamist authoritarianism’ (Yılmaz and Albayrak, 2022).

2.3 Securitisation of the State and democratic costs

In 2014, at the height of Daesh’s rise and at a critical juncture in the Syrian civil war, the Turkish government passed Law No. 6532 (Republic of Türkiye, 2014), known for the reforms it introduced to the National Intelligence Organisation. This legislation altered the structure and remit of the MİT, expanding its powers to operate both within and outside the country. Prior to this reform, strict judicial authorisation was required to intercept communications, access private data or carry out covert activities. Law No. 6532 removed many of these restrictions, granting the MİT functional immunity, expanding its data-gathering powers and allowing it to carry out covert operations without effective judicial oversight.

Whilst the law was highly beneficial to security and defence officials, Human Rights Watch (HRW) reported that same year that the measure undermined essential democratic safeguards, as it authorised the interception of communications, access to personal records and legal protection for agents even if they acted without a court order. Although the official intention was to strengthen the fight against threats such as Daesh, the reform revealed a

clear trend: Türkiye was beginning to deeply securitise its state apparatus. This securitisation meant that the threat was shaping its legal, governmental and judicial evolution.

'A new law on Türkiye's National Intelligence Agency greatly increases its surveillance powers whilst threatening journalists who expose its abuses with prison terms. The law would reduce state accountability, media freedom, and the right to privacy. Several of its key provisions should be amended without delay because they violate Türkiye's obligations under international human rights law and domestic laws. Under the law, journalists and editors who publish leaked intelligence material face prison terms of up to nine years' (HRW, 2014).

In 2017, the Venice Commission of the Council of Europe warned that Türkiye's emergency decrees following the 2016 coup had adverse effects on the state's counter-terrorism capabilities. Political control was strengthened, but institutional and operational resilience was eroded by the mass purges of the police, the army and the judiciary. The Commission warned that a state which concentrates power without checks and balances increases its vulnerability in the long term. This warning is essential to understanding the limits of Türkiye's ultra-aggressive policies: if security tools are applied and implemented disproportionately and without accountability, the result will always be greater instability. As Mateusz Chudziak (2016), a researcher at the Centre for Eastern Studies, warned, the removal of expert personnel in security, justice and intelligence, under the pretext of the fight against terrorism, temporarily undermined the state's effectiveness in the face of the terrorist threat.

'Following the failed *coup d'état* of 15 July 2016, which was immediately condemned by the President of the Venice Commission, the Turkish Government declared a state of emergency and began legislating through emergency decree laws [...] It is particularly worrying that, through emergency legislation, the central authorities are enabled, in the framework of the fight against terrorism, to appoint unelected mayors, deputy mayors and members of local councils, and exercise, without judicial oversight, discretionary control over the functioning of the municipalities concerned' (Venice Commission, 2017: 3–21).

Despite the centralisation of power and the hyper-presidentialisation carried out by Erdoğan, the subsequent repressive measures

were ineffective and revealed significant limitations: comparative experience and analyses published a decade ago warned Türkiye that overly coercive policies, based solely on repression, could prove counterproductive, generating further radicalisation among men, women and children. When state action is perceived as indiscriminate or excessively punitive, extremist groups exploit this narrative to recruit new followers. The growing Islamisation of the public sphere under the AKP, coupled with the repression of secular, Alevi or Kurdish dissidents, indirectly reinforces jihadist propaganda that presents itself as the true defender of Islam against a Turkish state perceived as authoritarian (Taş, 2018).

After lifting the state of emergency in 2018, the Turkish government passed a new anti-terrorism law which, in the words of the opposition, amounts to a 'permanent state of emergency' under the pretext of the fight against terror, as argued by HRW (2018). This law extended the period of pre-trial detention without charge from four to twelve days, broadened the grounds for banning demonstrations, and allowed the passports of both officials dismissed following the coup and their family members to be confiscated. Furthermore, it granted the intelligence services almost total legal impunity, leaving their internal operations 'beyond any public scrutiny' (HRW, 2018: 560). These regulatory changes consolidated the securitisation of dissent: the authorities now have legal tools to criminalise opposition activities under vague definitions of terrorism and threats to national security.

There are several cases that illustrate the discretionary use of security laws to penalise political dissent and show that, in contemporary Türkiye, anti-terrorism laws are routinely used to prosecute journalists, academics, activists and opposition politicians on generic charges such as 'terrorist propaganda' or 'membership of an armed organisation', which often lack any real basis (Freedom House, 2023). For example, in 2023, a court sentenced around twenty Kurdish leaders to long prison terms for posting content on social media relating to the 2014 Kobane protests. The posts were interpreted *ex post facto* as incitement to terrorism (HRW, 2024). In 2025, the arrest of the mayor of Istanbul, Ekrem İmamoğlu (Amnesty International, 2025b), triggered a wave of mass protests across the country. A joint statement by Amnesty International and ARTICLE 19, among other organisations, condemned the abusive use of public order and anti-terrorism laws to restrict freedom of assembly and expression, calling on the government to cease attacks against peaceful protesters,

journalists and critical voices. Subsequently, a specific report by Amnesty International on the crackdown on the March protests found patterns of unlawful use of force—tear gas, kinetic impact projectiles, water cannons and ill-treatment in custody—which, in some cases, ‘could amount to torture or other cruel, inhuman or degrading treatment’ (2025b: 2).

3 Cyberspace: control and securitisation of the information domain

The global cyber-threat landscape shows an increase in both the volume and technical complexity of attacks, which can have devastating consequences for any player on the international stage. In the specific case of Türkiye, the country faces increasingly sophisticated cyberattacks that cause disruptions to essential services, significant economic losses and a decline in public confidence in the digital economy (SETA, 2025). Furthermore, its rapid digital transformation and regional importance have attracted the attention of *hacker* groups and hostile state actors.

The National Cyber Security Index (NCSI), compiled by the e-Governance Academy in Estonia, ranks Türkiye 50th out of 126 countries in its 2025 ranking. The accuracy of this assessment reveals a low score for cyber crisis management capacity (22%), in contrast to high scores for military cyber defence (67%) and the fight against cybercrime (81%) (NCSI, 2025). This particular asymmetry reflects the fact that Ankara’s robust defensive capabilities coexist with limited preparedness to manage large-scale crises. This assessment is explained by the partial implementation of the 2024–2028 National Strategy (Presidency of the Republic of Türkiye, 2024) and by the fragmented application of cybersecurity policies by the Information and Communication Technologies Authority. Although the legal framework at the cyber level will be discussed in greater detail in subsequent sections, it is worth noting that the BTK, as the regulatory body responsible for overseeing telecommunications and internet use, has sought to build a more robust national cyber defence through specific measures such as *Tedbir 581.4*, relating to threat intelligence using AI and big data, or the cross-sectoral dissemination of protocols to protect critical infrastructure during emergencies.

Cyber-threat monitoring firms such as ThreatMoN paint a worrying picture of these emerging threats, where cyber-attacks and activities on the dark web pose growing risks. The criminal use of

the dark web, the spread of ransomware and the diversification of advanced persistent threats (APTs) form a triangle of growing risk for Ankara. Nor should other high-level vulnerabilities be overlooked, such as the sale of sensitive Turkish medical data containing personal information, the hijacking of military credentials with access to government networks, or the attempted sale of the government's '.gov' domain:

'Türkiye is rapidly transforming into a critical player in the global digital landscape. However, this advancement comes with heightened cybersecurity risks. The 2025 National Cyber Threat Report provides a comprehensive analysis of the growing threats and regulatory changes shaping Türkiye's cybersecurity environment. Dark web marketplaces continue to be a hotbed for the sale of sensitive Turkish data, including personal information and government access credentials. High-profile incidents include the sale of data from a Turkish nursery and unauthorised access to a retail company's internal systems. The attempted sale of a .gov domain controller further underscores the need for stronger defence measures' (ThreatMoN, 2025).

According to ThreatMon's analysis, ransomware attacks have intensified, affecting key sectors such as the technology industry, manufacturing, healthcare and finance. Criminal groups identified as RansomHub, Hellcat and FunkSec have carried out intrusions that paralysed business operations and compromised sensitive data, with prominent Turkish software and food companies among their victims. Similarly, cybercriminals and hackers associated with third-party states have increased their use of APTs and expanded cyber-espionage campaigns against critical infrastructure. There has been a rise in activity by state-linked groups such as Promethium, Iranian hackers and pro-Russian groups, including 'Cozy Bear' (*APT29/Nobelium*) and 'Fancy Bear' (*APT28/Sofacy*), which focus their attacks on strategic sectors such as public administration, energy and aerospace (Yuldoshkhujaev *et al.*, 2025). These actors employ sophisticated techniques to steal sensitive information or sabotage capabilities, in line with the geopolitical tensions in the region.

3.1 Disinformation and digital threats

Bodies within the European Union in general, and the European Parliament in particular, have warned that foreign actors routinely

carry out manipulation campaigns, or Foreign Information Manipulation Interference (FIMI), aimed at spreading manipulative narratives within the Turkish information landscape and thereby undermining democratic cohesion² (European Commission, 2025). For example, in March 2025, the European External Action Service emphasised that Operation Doppelgänger³, a FIMI campaign attributed to Russia and active since 2022, was operating in the Turkish language to generate chaos, division and social polarisation (European External Action Service, 2025). From the perspective of local government, this hybrid and cyber-based issue is perceived as a matter of national security of the highest order, and they have emphasised the risk posed by mass disinformation campaigns. At the STRATCOM21 summit, organised by the Presidency's Communications Directorate, Erdoğan outlined his view on the matter:

'Disinformation has become a global security issue. The world's developed democracies are on high alert in the face of rising digital fascism and the wave of fake news. Disinformation has transcended the concept of national security and become a global security issue. [...] Social media, described as a symbol of freedom when it first emerged, has become one of the main sources of threat to democracy today' (Erdoğan, quoted in Özkan, 2021).

Since 2021, officials in Ankara have maintained that malicious actors are exploiting the digital ecosystem to polarise Turkish society, spread extremist propaganda or sow chaos during critical political processes, such as elections or referendums: 'We

² See: European Commission (2025), *Türkiye 2025 Report*, which sets out the EU's concerns: 'The EU's serious concerns about the continued deterioration of democratic standards, the rule of law, the independence of the judiciary and respect for fundamental rights were not addressed. The arrests of and charges brought against elected officials, opposition figures, political activists, civil society and business representatives, journalists, and others since the beginning of 2025 have raised increasing questions regarding Türkiye's adherence to its democratic tradition, and deepened concerns about the independence of the judiciary'.

³ See: European External Action Service (2025), *3rd EEAS Report on Foreign Information Manipulation and Interference Threats: Exposing the architecture of FIMI operations*, which states that 'Doppelgänger is a FIMI campaign attributed to Russia, active since mid-2022. According to data collected by the EEAS, it consists of 228 domains and 25,000 CIB networks operating across nine languages: English, German, French, Spanish, Turkish, Polish, Arabic, Hebrew and Italian. The campaign has a prominent presence within the Russian FIMI infrastructure and has been linked to 60 documented incidents in the analysed sample'.

are trying to protect our people, especially the vulnerable sectors of our society, from lies and disinformation without violating our citizens' right to receive accurate and impartial information' (Erdoğan, quoted in *The Independent*, 2021). Some time later, in 2023, at the STRATCOM23 summit, the President of the Republic of Türkiye made a fresh call to combat disinformation: 'We need to wage a comprehensive fight against the destructive effects of disinformation, which corrupts democracy and undermines individual rights and freedoms' (Erdoğan, 2023). The theme of that summit was the 'global fight against hybrid threats', making it clear that the country had already adopted an increasingly vigilant and proactive approach to information control.

The problem was that, under the pretext of protecting the population from digital threats, disinformation and fake news, the state apparatus was beginning to deploy a set of instruments that made it impossible to strike a balance between information security and media freedom. And, as European authorities have warned, this constitutes the most complex challenge facing Türkiye:

'With regard to hybrid threats, in the context of international conflicts and crises, the circulation of false information and propaganda on social and mainstream media was observed also in the Turkish information environment. Türkiye did not restrict the operations of Russian media outlets in the context of the Russian aggression against Ukraine. In addressing disinformation, it is crucial that Türkiye does not further restrict media freedom, but that it implements, in an objective and proportionate manner, any legal framework aimed at preventing the spread of false information' (European Parliament, 2022).

3.2 Legal framework and the fight against disinformation

Faced with the disruptive landscape emanating from cyberspace, Türkiye has adopted specific legal measures to respond to hybrid threats in the information sphere and to regulate the virtual and digital space. In 2022, Law No. 7418, known as the Law on Combating Disinformation (Republic of Türkiye, 2022), was passed, making the dissemination of 'false information' that threatens security, public order or public health a criminal offence punishable by three years' imprisonment. Furthermore, as noted by the law firm Elig Gurkaynak (2022), government

control over online news sites and social media was tightened, obliging digital platforms with over one million users to establish legal representation in Türkiye—a requirement already introduced in 2020—and to comply with orders to remove content and hand over user data, under threat of severe penalties (Amnesty International, 2022)

In 2024, the Government drew up the *National Cyber Security Strategy and Action Plan 2024–2028* (Republic of Türkiye Ministry of Transport and Infrastructure, 2024) and established national priorities in the field of cybersecurity: protection of critical infrastructure, incident response capabilities, digital governance and international cooperation. The Strategy assesses the country's geopolitical situation and cyber vulnerability: 'Due to its geopolitical importance, economic structure and the leaps in the field of technology, particularly those made in recent years, our country is a target for cyber threat actors' (R. T. Ministry of Transport and Infrastructure, 2024: 7). In the introduction, the president speaks of the need to establish cyber deterrence and for Türkiye not only to be a country that uses technology, but also one that produces it.

'The key issue is to have a strong cyber defence on a national scale [...] With the increase in cyber threat actors and attack vectors, threats have become increasingly complex, and the emergence of hybrid threats that include cyber threats reveals that the approach to cyber defence to counter these forces must be developed simultaneously and proportionately' (R. T. Ministry of Transport and Infrastructure, 2024: 6–18).

The document published by the Ministry of Transport and Infrastructure in 2024 identifies nine operational goals, among which the fourth stands out, focusing on strengthening cybersecurity and building user confidence. This objective sets out a series of specific measures, including: the creation of a daily coordination committee comprising the Presidency of Cybersecurity, the National Intelligence Organisation, the banking regulator and the main operators of critical infrastructure; the annual expansion of the National Incident Response Centre through the deployment of AI-based sensors and big data analytics platforms, capable of processing over three million events daily; and the requirement for provincial incident response teams, known as *SOME*, to obtain security certification issued by the Turkish Standards Institute, as well as exchanging real-time compromise indicators via the

Turkish Threat Intelligence Network. The plan also provides for the drafting of secondary legislation regulating remote electronic signatures; the approval of an emergency and cyber crisis management protocol to ensure the recovery of critical infrastructure within less than twenty-four hours; and the development of cyber hygiene campaigns. All of this contributes to strengthening the supervision of the radio spectrum, the security of fifth-generation networks and confidence in e-commerce, under an integrated and continuously operating response architecture.

In 2025, recognising the cybersecurity challenge, Erdoğan decided to establish the 'Cybersecurity Directorate' under the control of his presidency, demonstrating his intention to be a key player in the digital sphere (Kizilaslan, 2025). Months later, Türkiye passed Law No. 7545, or the Cybersecurity Law (Republic of Türkiye, 2025), which declares cybersecurity a national priority. Among its key pillars are the protection of critical infrastructure and sensitive data, the promotion of national cyber defence solutions, and the continuous improvement of security policies and capabilities. Its scope of application is exceptionally broad, applying to public authorities, institutions, natural and legal persons, and entities without legal personality that exist, operate or provide services in cyberspace, the latter being defined as an environment encompassing all information systems connected directly or indirectly to the internet, electronic communications or computer networks.

As set out in Article 9 of Law No. 7545, its adoption entails the creation of the 'Cybersecurity Council', which will be responsible for establishing national policy, identifying critical infrastructure, resolving jurisdictional conflicts and approving the national technology roadmap. Furthermore, the Presidency of Cybersecurity is strengthened as the central authority responsible for enforcing the law, conducting audits, coordinating incident response teams and managing cyber threat intelligence, including international cooperation (TRT Haber, 2025).

The new regulations also impose stringent security and notification requirements on organisations: they must carry out periodic risk assessments, implement appropriate protective measures in their information systems and promptly report any incident to the competent body (Kizilaslan, 2025). Furthermore, companies and agencies must establish internal incident response teams and use security products certified by the Cybersecurity Presidency. Penalties for non-compliance have been significantly tightened, including prison sentences for serious cybercrimes.

The law refers to various cases, including the unauthorised disclosure of data relating to essential public services, which can result in three to five years' imprisonment, whilst cyberattacks that compromise national security could be punishable by ten to fifteen years' imprisonment.

3.3 State surveillance and control of the flow of information

Since the 2014 reform of the Intelligence Act, and under the guise of combating terrorist and hybrid threats, Türkiye has stepped up its electronic surveillance capabilities and established a regulatory framework that makes mass surveillance a state policy (Freedom House, 2025). One example is that the MİT now has the power to tap lines and collect metadata without effective judicial oversight. Against this backdrop, the European Parliament has warned that Türkiye has become the country with the most restrictive legal framework for digital journalism in the Eurasian region, a point that had already been raised in 2023 when European institutions stated that the Disinformation Law constituted a threat to freedom of expression in the country.

'A highly concentrated and government-controlled media environment can lead to an informational autocracy, where the state or malign foreign actors can easily exert influence through the manipulation of information [...] Denounces signs of Turkish interference and persecution of political activists, opposition leaders and minorities within the EU; condemns Türkiye's new Disinformation Law proposal, which poses a threat to freedom of speech in the country' (European Parliament, 2023).

The application of current Turkish legislation results in internet blackouts whenever a political crisis erupts: In 2016, during the attempted coup, Twitter, YouTube and Wikipedia were blocked; In 2020, as wildfires ravaged the Turkish Mediterranean, the authorities reduced the bandwidth of Twitter and Instagram for twenty-four hours to stifle criticism of the state's inadequate response. In 2021, Signal was subject to a twenty-three-hour selective block after being used by university students to coordinate protests against the appointment of a pro-government rector at Boğaziçi University. In 2025, during the protests triggered by the arrest of the mayor of Istanbul, the government once again resorted to cutting bandwidth, and the people of Istanbul found social media virtually inaccessible for forty-two consecutive hours (Amnesty International, 2025a). As noted by the Open Observatory of

Network Interference (OONI, 2025), Twitter/X, Instagram, TikTok, YouTube, WhatsApp and Signal were reduced to 8% of their capacity, whilst Telegram became completely inaccessible to users of the TTNET and Turkcell Superonline networks. At the same time, the platform founded by Jack Dorsey was required to suspend the accounts of political opponents without a court order, as part of the response to these protests. Turkish legal experts denounced the arbitrary nature of these extrajudicial measures, pointing out that they were adopted under the pretence of preventing alleged fake news, but in the absence of a transparent legal basis. As Yaman Akdeniz, professor and director of Türkiye's Freedom of Expression Association—İfade Özgürlüğü Derneği (İFÖD)—, points out, Türkiye is moving towards a 'surveillance state', where digital tools are used for preventive censorship and social control.

'There was no court decision behind the bandwidth reduction or the attempt to block X accounts. These measures were put in place arbitrarily [...] We are moving towards a surveillance state [...] By law, the BTK can only keep the data collected for two years. However, we have seen data dating back 10 years being provided to prosecutors during the investigation into the Istanbul mayor. This data retention, in contravention of the law and for purposes that remain unknown, paves the way for arbitrary practices. Through facial recognition, the government is attempting to deter people from joining demonstrations, whilst hindering their mobilisation via social networks' (Akdeniz, 2025).

Control is not limited to blocking channels, as the state has also deployed a surveillance infrastructure comprising thousands of cameras equipped with facial recognition algorithms that turn the streets into an extension of the digital realm, reaching Orwellian levels, as investigative journalist Ylenia Gostoli (2025) points out: 'Türkiye is not hiding its ambitions to expand AI-driven security'. During the 2025 protests, the video surveillance network identified a huge number of protesters in just forty-eight hours, enabling targeted arrests the following night. Against this backdrop of state control, İFÖD, together with other organisations, published an open letter in May 2025 to social media companies regarding censorship in Türkiye⁴ (IFOD *et al.*, 2025).

⁴ See: IFOD *et al.* (2025). Letter addressed to Mark Zuckerberg, Chief Executive Officer, Meta; Shou Zi Chew, Chief Executive Officer, TikTok; Neal Mohan, Chief Executive Officer, YouTube; Linda Yaccarino, Chief Executive Officer, X.

The General Directorate of Security, with its units specialising in cybercrime and social media analysis, completes the so-called circle of control and monitoring: it has the capacity to process millions of posts from Twitter, Instagram or TikTok to generate influence maps and flag users with 'potential for radicalisation', information which it then cross-references with browsing histories retained by the BTK technology authority for ten years, in breach of the two-year legal limit set out in Law 5651. The result is a cumulative archive that allows criminal cases to be built on posts from a decade ago. This atmosphere of widespread censorship, where every click is recorded and can be used retroactively, turns any demonstration into a laboratory for mass identification: unlike what happened during the Gezi protests in 2013 when activists dominated social media, today every visible face can be recorded, linked to an identity and an address, and consequently face criminal charges.

'The scale of censorship in Türkiye is staggering: by the end of 2024, the total number of websites and domain names blocked in recent years reached 1,264,506, as documented by Dr Yaman Akdeniz of the Freedom of Expression Association (IFÖD). IFÖD's latest report shows that 5,740 news articles scraped last year were based on 803 court orders. Amid the crackdown, some persist in pushing back' (Inform, 2025).

Faced with this situation, civil society has woven networks of resistance that combine technology and self-organisation. An analysis of reports from Freedom House, MLSA, NetBlocks, Access Now, Top10VPN and ProtonMail reveals that between 2020 and 2024, the use of virtual private networks (VPNs) in Türkiye saw significant growth, particularly coinciding with episodes of social media blocking and information restrictions. Reports from service providers and internet monitoring organisations indicate that, during the lockdowns in March and September, VPN-related traffic increased several-fold compared to usual levels, placing Türkiye among the countries with the highest peaks in the use of these tools in contexts of digital censorship (Migliano, 2025).

On the streets, protesters have revived the use of scarves and caps as face coverings, but are also experimenting with anti-recognition make-up and glasses whose patterns confuse surveillance cameras and their identification algorithms; groups such as *DigitalMask* distribute 'adversarial face' templates that reduce

identification success rates (SWI, 2025a). In the courts, the İFÖD association and the Istanbul Bar Association have filed more than sixty constitutional challenges against the Cybersecurity Law and the 2025 blocks, the rulings on which are still pending⁵.

The government, however, is sticking to the line set by the president and is fighting on multiple fronts. When technical censorship is not enough, it resorts to official disinformation: during the 2025 protests, President Erdoğan accused the demonstrators of 'spreading terror', committing vandalism and desecrating mosques, claims which, despite being refuted by video footage, succeeded in delegitimising the mobilisation in the eyes of conservative sectors (Mourenza, 2025). This narrative counter-insurgency⁶ (Amnesty International, 2021) functions as an extension of technical censorship: if it is not possible to prevent the protest, at least its legitimacy is eroded. The result is a vicious circle in which the law enables surveillance, technology identifies, censorship silences and disinformation discredits, placing Türkiye at 159th out of 180 in Reporters Without Borders' press freedom index (2025).

From the White Palace (*Ak Sarayı*), the need to regulate the digital ecosystem is defended in order to protect citizens from the avalanche of hoaxes and malicious campaigns. Senior officials, including President Erdoğan, reject accusations of an authoritarian drift and instead emphasise 'the disruptive harm of disinformation' in contemporary society, as noted by Fahrettin Altun (2023), Director of Communications at the Presidency of Türkiye during the period 2018–2025. Burhanettin Duran, the current Director of Communications, takes the same line, even pointing out that many Western countries are legislating against fake news and arguing that Türkiye has the sovereign right to do the same to safeguard its democracy (Daily Sabah, 2025). This does not prevent independent observers from emphasising that the key will lie in how the law is interpreted and enforced: used prudently, it could curb malicious campaigns, but used in a partisan manner, it could further restrict the space for public debate (Hassan, 2025). It is unsettling and worrying to consider how this set of legal frameworks will be used to curtail public debate in the months leading up to the 2028 presidential elections.

⁵ See: Amnesty International (2025c).

⁶ See: Amnesty International (2021).

Conclusions

Over the last ten years, the way in which Türkiye has perceived and managed its risks has evolved as the phenomena affecting its security have transformed. Analysis of the three threats under study, understood as the main risks to Türkiye's stability and national unity, demonstrates that the country led by Erdoğan is as powerful as its internal security is stable. Thus, foreign policy and domestic policy are interconnected, demonstrating that it is correct to assert that Ankara's capacity for regional and global projection is entirely conditioned by the evolution of insurgency, terrorism and cybersecurity at the domestic level.

On Türkiye and its counter-terrorism strategy

Between 2016 and 2026, Türkiye has established itself as a regional power and has revolutionised its counter-terrorism strategy with remarkable success. Whilst confronting the PKK both within its own territory and beyond, in Syria and Iraq, Ankara has adapted its operational tactics and intelligence capabilities to manage the threat of terrorism in a preventive and proactive manner. As Murat Yeşiltaş (2025), Director of Foreign Policy at the SETA Foundation, explains, the improvements seen in the counter-terrorism strategy implemented by Türkiye are due, on the one hand, to a paradigm shift and a new understanding of the threat, and on the other, to tactical and operational transformations in the fight against various terrorist groups on the ground.

With regard to the paradigm shift and understanding of the threat, Erdoğan has been integrating and synchronising political, security, economic and technological efforts to strengthen the state's overall capacity to neutralise terrorist attacks, intercept their communications, curb their funding and disrupt their recruitment processes. Whereas in 2016 Türkiye's counter-terrorism strategy was based on an action-reaction plan and was consequently short-term and one-dimensional, by 2026 the approach had changed completely and counter-terrorism efforts are now conceived from a multidimensional and long-term perspective. Previously, it seemed limited to reacting to terrorist attacks against strategic military targets, particularly in the south-east of the country. Now, the counter-terrorism strategy focuses on constant and preventive military and security operations.

As terrorism evolved and became a more fluid, networked and resilient phenomenon, Türkiye transformed its understanding of the issue and came to interpret it as a structural threat requiring new approaches and capabilities: Ankara now operates simultaneously in the physical and virtual spheres, combining covert intelligence operations with high-profile police and military operations, acting in major urban centres and isolated rural areas, and applying its hard power in full conjunction with its soft power and sharp power.

With regard to tactical transformations, it should be noted that the reason for the success of recent police operations, in which more than three hundred and fifty terrorists linked to Salafist jihadism were arrested, lies in operational innovation and technological modernisation (Pluvinet, 2025). From the purge following the *coup d'état* up to the present year, 2026, it has become clear how Türkiye has devoted a significant number of resources to technological development and training programmes for the various security forces aimed at countering the terrorist organisations identified in its *National Security Strategy 2024–2028*. The reforms carried out under Erdoğan's leadership and the empowerment of certain ministries, agencies and bodies such as the MİT or the BTK have enabled Ankara to control virtually the entire operational domain and, consequently, to increase its capacity to dismantle the networks established by the various terrorist groups operating within its sphere of influence.

At present, as indicated in the Geopolitical Panorama of Conflicts 2025 (Sánchez, 2025: 119), Türkiye is effectively combining the combat experience accumulated over more than four decades by its police and military personnel with the development of cutting-edge technological capabilities, thanks to the work of organisations such as TÜBİTAK SAGE and companies such as Aselsan, Havelsan, TAI, Roketsan, Baykar and MKE. In relation to the technological sphere and the defence industry as applied to counter-terrorism and counter-insurgency, it is worth highlighting the Steel Dome or *Çelik Kubbe* project, launched in 2024 by the Defence Industry Executive Committee (SSİK); the Anka-III, Aksungur and Super Şimşek UAVs developed by TAI; the Bayraktar TB2, TB3, Akinci and Kizilelma UAVs, designed by Baykar; and the electronic warfare, video surveillance, facial recognition and artificial intelligence systems developed by Aselsan and Havelsan. Thus, technologies applied to the surveillance and monitoring of social media and public spaces, new counter-terrorism tactics and

strategies, improvements in training, the updating of intelligence cycles and the enhancement of mechanisms for collaboration and information exchange with European countries have undoubtedly helped to prevent further terrorist attacks.

However, the situation also presents challenges, concerns and uncertainties. Despite operational and technological advances, the achievements made are fragile, reversible and deeply dependent on unresolved structural factors. The regional power led by Erdoğan has demonstrated a remarkable capacity to neutralise immediate threats, but has failed to defuse the conditions that generate them. In this regard, the post-conflict Kurdish situation, the evolution of jihadism and hybrid threats from cyberspace form a triangle of structural risks that could trigger a new wave of violence or a crisis of state legitimacy in the medium to long term.

On Türkiye and the PKK

When it comes to the PKK, it is clear that we are dealing with an entrenched and chronic conflict characterised by a perpetual spiral of terrorist violence that transcends borders. The announcement of the organisation's dissolution in 2025 does not inspire much confidence, given the numerous and fruitless ceasefire declarations issued in 2002, 2006, 2009 and 2013. Furthermore, this announcement has not, at least for the time being, been accompanied by an inclusive, transparent peace process with meaningful civilian participation. Nor has it been accompanied by a process of disarmament, demobilisation and reintegration (DDR) of combatants. The fact that no concrete political reforms have been implemented or that the historical demands of the Kurdish movement have not yet been addressed breeds mistrust. And as is the case in other conflicts around the world, this implies an increased risk of internal fracture within the movement itself, where more radical factions could break the ceasefire if they perceive that the political path is blocked.

Furthermore, the PKK's influence over the YPG in Syria remains a source of geopolitical tension, as Türkiye cannot negotiate with them, yet cannot ignore their presence in a key border area. This leaves the door open to new unilateral military operations, which will fuel the cycle of violence.

For all these reasons, and despite announcements of an end to armed struggle, the Turkish state cannot and must not cease

to identify the PKK as a direct challenge to national unity, as a threat to the survival of the state, and as a strategic threat to its security. As with any form of ethnic or nationalist armed violence, the PKK is likely to fluctuate in intensity and visibility, but not to disappear completely. Hence, it is in Ankara's interest to maintain a strategy of permanent containment on the security front and a strategy of constant dialogue on the political and social fronts.

The resolution of the Kurdish conflict is a prerequisite for Türkiye to be able, from an operational standpoint, to act as a regional power and aspire to be a global actor in the future. Its ability to project its power abroad depends on how stable and secure its internal situation is.

On Türkiye and Daesh

When considering the Salafi-jihadist terrorism of Daesh, it is worth remembering that the decline in the number of attacks does not equate to an ideological defeat or a structural dismantling. The dismantling of cells in 2024 and 2025 confirms that jihadism has not been defeated, but rather decentralised. As is evident from the article *The Islamic State Is 'Back'. In Reality, It Never Went Away* by Clara Broekaert and Colin P. Clarke (2025), Daesh has been shifting towards less hierarchical and more autonomous and unpredictable forms.

Over the past decade, jihadism in Türkiye has evolved into more diffuse and digital forms, with micro-cells that do not rely on a central hierarchy, but rather on ideology, funding and recruitment networks that remain active in cyberspace and in marginalised neighbourhoods. Online radicalisation, the criminalisation of poverty and the lack of deradicalisation programmes make the country a breeding ground for a new generation of extremists, particularly among young Turks and Syrian refugees who see no economic or social prospects. Although the Turkish authorities' punitive response is increasingly effective in dismantling cells, it does not address the root causes of the threat, as Peter Neumann (2025), director of the Centre for the Study of Radicalisation, warns.

It is these ideas that allow us to assert that, despite the notable improvements described in the opening paragraphs of these conclusions, Turkish security policy has generated a negative feedback loop: the priority given to the fight against the PKK has

limited cooperation with key Kurdish actors in Syria and Iraq, hindering the control of jihadist networks. At the same time, the tightening of the counter-terrorism framework against jihadism has reinforced a security narrative that reduces Kurdish political space, fuelling tensions that perpetuate the conflict, as argued by Francesco Siccardi (2021), deputy director of Carnegie Europe. Türkiye thus embodies a security dilemma: how to contain the threat of terrorism without the state itself becoming a factor of instability. Ankara has built its security architecture on a foundation that reproduces the very problems it seeks to resolve. Law 6532, which granted functional immunity to the MİT, coupled with institutional purges and the securitisation of the Diyanet, has helped to combat Daesh and the PKK, but it also erodes public trust, fragments social resilience and generates new recruits for extremism.

On Türkiye and cyberspace

Turning to the field of cybersecurity, over the last decade it has become evident that Türkiye, due to its geostrategic position, has been suffering cyberattacks affecting critical infrastructure, governance and public opinion. Noteworthy are the warnings issued by the European External Action Service regarding the FIMI DOPELGÄNGER campaign attributed to Russia, the operations detected by ThreatMon concerning sabotage and interference carried out by cybercriminal groups such as RansomHub, Hellcat and FunkSec, and the intensive use of cyberspace by terrorist organisations such as Daesh and the PKK. Added to this are the theft of information from millions of citizens by hackers (Yinanç, 2016) and the ongoing data breaches affecting tens of millions of people, highlighted by the cybersecurity expert Minhac Çelik (2025). These and many other recurring harmful actions have highlighted Türkiye's cyber vulnerability.

For all these reasons, Erdoğan has decided to fully incorporate the digital domain into his national security architecture, explicitly integrating it into an expanded concept of sovereignty that links *Kara Vatan*, *Mavi Vatan* and *Siber Vatan* as interdependent spaces, as set out in the 2024–2028 Strategic Plan. From a strictly operational perspective, as the Turkish government explained at the STRATCOM23 summit, Ankara has demonstrated a growing capacity to identify, attribute and respond to cyberattacks, hybrid threats and disinformation campaigns originating

from both domestic and foreign rivals, such as terrorist organisations, insurgent opposition groups or third states. The successive adoption of four National Cybersecurity Strategies (2013–2014, 2016–2019, 2020–2023 and 2024–2028), the development of the *Ulusal Siber Güvenlik Stratejisi ve Eylem Planı 2024–2028* as a fully integrated Action Plan, the introduction of the first comprehensive and specific cybersecurity regulation in the form of the Cybersecurity Act of 2025 (Act No. 7545), the implementation of the Act on Combating Disinformation (Act No. 7418), the creation of the Presidency of Cybersecurity by presidential decree, the direct reporting of all structures and agencies to President Erdoğan, and the promotion of the domestic industry for the development of its own technological cyber capabilities, demonstrate political continuity, progressive technical maturation and the consolidation of the State's cyber resilience in the face of an increasingly hostile information environment.

Whilst all these medium- and long-term measures are positive and necessary, various organisations and bodies have raised concerns that excessive control undermines the freedoms of Turkish citizens. The European Union and non-governmental actors such as the Committee to Protect Journalists, Human Rights Watch, ARTICLE19 and IFOD have denounced these policies by taking legal action and issuing joint statements addressed to major technology companies such as META and X, urging them not to succumb to the government censorship implemented by the government: 'Under the United Nations Guiding Principles on Business and Human Rights (UNGPR), social media companies have a responsibility to respect human rights, which includes resisting government pressure to restrict freedom of expression in ways that violate international human rights law' (IFOD *et al.*, 2025).

The digital repression suffered by Türkiye continues to intensify and has been particularly severe following the arrest of Ekrem Imamoglu, the mayor of Istanbul, in March 2025, at which point platforms such as X and Bluesky complied with Turkish court orders and shut down their domains (Reci, 2025). Critics of the implementation of the Cybersecurity Law argue that security controls take precedence over rights, and that the legislation is being used to silence dissent or legitimate information critical of Erdoğan's hyper-presidentialism.

As Byung-Chul Han (2022), the philosopher who won the 2025 Princess of Asturias Award for Communication and Humanities,

points out, the power of a 21st-century state lies in its ability to access its citizens' information in order to exercise psychopolitical surveillance. Türkiye, with its current tools, has access to the entire flow of data generated by its more than eighty-five million inhabitants. On the one hand, this grants it the knowledge and power to anticipate cyberattacks and hybrid threats that jeopardise its security with increasing agility. On the other hand, it grants it the capacity to monitor and control citizens, shape public discourse, alter narratives, suppress dissent, reduce social and religious pluralism, and fragment the political opposition. In the medium term, this use of power derived from control of *Siber Vatan* will help Erdoğan steer the country's political will ahead of the 2028 presidential elections, but in the long term it will exacerbate the very threats he seeks to combat.

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Chapter Four

The geopolitical discourse of the Turkish political elite on human rights

Carmen Rodríguez López

Abstract

This article analyses the speeches delivered by Turkish representatives at the United Nations General Assembly, held annually in New York since 2002—just before the Justice and Development Party (AKP) came to power following the general elections in November of that same year—up to the present day. The analysis will focus on the geopolitical perspective that the ruling elite has put forward regarding the human rights situation on the international stage throughout this period. This will enable us to ascertain which regions are highlighted when denouncing human rights violations on a global scale and what role is assigned to Türkiye in relation to these phenomena. These discourses align with Türkiye's categorisation as an emerging middle power aspiring to regional and global relevance, and reveal that the state of relations with the countries and actors mentioned influences—as academic literature has also noted in other cases (Terman, 2023)—where and how certain human rights violations occur.

Keywords

Türkiye, Geopolitics, Human rights, United Nations.

Introduction and methodology

The discourse on human rights at the state level, which has proliferated significantly worldwide in recent decades, is a powerful rhetorical tool for influencing others, establishing legitimacy and promoting one's own interests. This article analyses the discourse on human rights put forward by Türkiye's representatives at the United Nations General Assembly, held annually in New York since 2002. In 2002, the representative of the tripartite government that had governed the country from 1999 until that year addressed the assembly. From 2003 onwards, the speakers have represented successive AKP governments to date or the Presidency of the Republic. These addresses were delivered by the Minister of Foreign Affairs, the Prime Minister or the President of the Republic, depending on the period in question. The aim is to analyse the image of the Turkish state projected in this sphere when defining its role on the international stage and in its relations with third countries.

The article will examine the most recurring themes in human rights discourses, following the widely used—though not uncontroversial—categorisation of first-, second- and third-generation human rights. And, in turn, what are the narratives surrounding them that serve the Turkish political elite to construct a narrative of victimisation, in which those under attack are identified; a narrative of accountability or shaming, in which those responsible for these human rights violations are identified; and a narrative of legitimisation, which extols the Turkish government's normative stance on these issues.

1 The geopolitics of human rights

Human rights are inalienable rights of human beings by virtue of their humanity, considered essential for leading a dignified life, regardless of a person's ethnicity, sex or gender, language, religion, origin, ideologies, mental or physical abilities, or any other distinguishing criterion (Anaya Muñoz, 2021; Forsythe, 2017).

In Western Europe, their legal and philosophical conceptualisation developed during the Modern Age. It was, however, after the Second World War that an institutional framework endorsed by the United Nations was established, with the aim of shaping an international order in which they would hold a prominent place.

The United Nations Charter already included in its Chapter I on purposes and principles 'the promotion and encouragement of respect for human rights and fundamental freedoms for all'. In turn, on 10 December 1948, the Universal Declaration of Human Rights (UDHR) was proclaimed by the United Nations General Assembly in Paris. The UDHR has served as an inspiration and stimulus for the adoption of more than seventy human rights treaties worldwide.

Authors such as Griffiths (2023) point out, for their part, the need to qualify the narrative regarding the formation of this institutional architecture as a fundamentally Western project, which has omitted the participation of countries from the Global South in its conception and development. Thus, the Organisation of American States (OAS) adopted the American Declaration on the Rights and Duties of Man in the same year, months before the UDHR. The author recalls that countries such as the United States, Great Britain, France and the Soviet Union were reluctant to address human rights issues at the Dumbarton Oaks Conference held in 1944, with the aim of establishing an international organisation following the Second World War, which would give rise to the United Nations. Griffiths (2023) notes, in turn, that the voices of thinkers from countries such as India, Lebanon and Chile, amongst others, were essential in the drafting of the UDHR; however, this does not detract from the fact that a large number of African and Asian countries were unable to participate in its formulation as they were under colonial rule (Perry, 1997).

This international framework has given rise to specific regional regimes for the protection of human rights within the OAS, as mentioned above, in Europe, both within the Council of Europe and the European Union (EU), in the African Union, which has the African Charter on Human and Peoples' Rights, and in the Association of Southeast Asian Nations (ASEAN), which adopted the ASEAN Declaration on Human Rights in 2012 (Anaya Muñoz, 2021: 15).

By the early 21st century, more than 160 States had formally acceded to the International Covenant on Civil and Political Rights and the International Covenant on Economic, Social and Cultural Rights, adopted in 1966. During this period, three regional human rights courts have been established: the Inter-American Court of Human Rights, the European Court of Human Rights and the African Court on Human and Peoples' Rights.

The 1949 Geneva Conventions, fundamental to humanising the context of war, have been universally ratified. In 1994, the United Nations General Assembly established the Office of the High Commissioner for Human Rights, and in 1998 the Rome Statute was adopted, leading to the establishment of the International Criminal Court. In 2006, the United Nations Human Rights Council, the principal intergovernmental body responsible in this field, replaced the United Nations Commission on Human Rights, which had been established in 1946 (Forsythe, 2017).

All this demonstrates the growth and evolution of an international institutional architecture which, despite its weaknesses, has managed to adopt important agreements and equip itself with legal instruments of great significance, although it has not been immune to being exploited. Indeed, at the state level, the discourse on human rights was used selectively to preserve and expand spheres of influence in both the Western Bloc and the Soviet Bloc during the Cold War. Other significant issues related to its evolution point to the momentum experienced by the defence of human rights, thanks to the role played by civil society with the emergence of organisations such as Amnesty International and Human Rights Watch in the 1960s and 1970s respectively, and to the process of decolonisation (Kaplan, 2021; Griffiths, 2023; Forsythe, 2017).

The specific development of these rights throughout the second half of the 20TH century has led to the categorisation of first-, second- and third-generation rights. First-generation rights are those related to civil and political rights, concerning the fundamental rights and freedoms of the individual. Second-generation rights are the so-called economic, social and cultural rights. These advocate for the guarantee of minimum material and social conditions that allow for the full development of the individual. Whilst the former extol freedom, the latter place the emphasis on equality. The protection and defence of the former are set out more specifically in the International Covenant on Civil and Political Rights, and that of the latter in the International Covenant on Economic, Social and Cultural Rights, both adopted in New York in 1966.

The so-called third-generation rights, a term coined by the Director of UNESCO's Legal Department, Karel Vasak, in 1979, also known as solidarity rights, include the right to self-determination, to a healthy environment, the right to sustainable development, the right to humanitarian aid and the right to peace. These rights concern groups, communities or nations, or even

humanity as a whole, and are not explicitly recognised, as are the two previous categories in the 1966 Covenants. Although they do not constitute an exhaustive list, they have served as a framework for addressing some of the most pressing issues facing the international system today. Decolonised states and those belonging to the non-aligned movements have played a decisive role in promoting these third-generation rights, which place the emphasis on development and sovereignty over resources, amongst other issues, at the centre.

Whilst the educational value of this classification has been emphasised, the importance of avoiding rigid categorisations has also been highlighted, given that the principles of the indivisibility and interdependence of rights have been recognised in legal doctrine. For example, the right to life cannot be guaranteed unless a minimum standard of living or a healthy environment is also guaranteed. Another risk of this classification is the possibility that first-generation rights may be prioritised, thereby minimising the importance of the rights demanded in subsequent generations (Falcón and Tella, 2003; Bonet de Viola, 2016; Luño, 2014; Rey Marcos, 2013).

Despite the large number of countries that have ratified the 1966 International Covenants, their categorisation has not been without criticism; from a culturalist and relativist perspective, their universalist aspiration has been called into question. More specifically, their 'Western' character has been criticised, although within the group of countries typically included in this category, there are also very different understandings of the content of human rights, their scope and hierarchy. It is common to find studies in the academic literature that highlight the ideological emphasis placed by Western Bloc countries during the Cold War on civil and political rights, and the emphasis placed by the Soviet Union on economic, social and cultural rights, although clear demands along these lines can be found in Western European countries as far back as the 19TH century (Perry, 1997; Griffiths, 2023). It has also been noted that 'it is appropriate to set out and highlight the social struggles that have led to their development, or the socio-historical and economic context in which they unfold' (Gándara Carballido, 2019).

Another crucial point to highlight in this section is the gap between rhetoric and the effective implementation of human rights by states, which are often accused of selective application and double standards when assessing the attitudes of allied

or rival governments in this field (Kuosmanen, 2021; Griffiths, 2023). Despite this, and although human rights have been the subject of flagrant violations during this period, one cannot deny the aspirational impact they have had on the shaping of political regimes worldwide and in the field of International Relations. Indeed, Vento (2020) concludes that:

‘the values invoked are gradually becoming institutionalised and, as a result, are becoming increasingly functional for epistemic governance, which favours the convergence of discourses in international politics. Although actors from different ideological, cultural and political backgrounds have emphasised different rights and issues when invoking the language of human rights, such appeals have been based almost exclusively on a common understanding, shared on a global scale, of the importance and essential nature of human rights’.

Chandler (cited in Jahren, 2013), for his part, argues that it is, in fact, easier for government actors to promote an ethical discourse in favour of human rights in the international sphere than in the domestic arena, as the former is far less subject to accountability.

If the discourse on human rights has become institutionalised in international relations, it is essential to examine a key phenomenon in this regard known as ‘shaming’—the open and public naming of those states that commit human rights violations. Whilst the rhetoric surrounding these rights has become institutionalised over the decades, the use of shaming as the primary tool to promote compliance with these norms has also grown exponentially, as only the most militarily and economically powerful states tend to use coercion as a method to ensure compliance with standards in this area. Shaming serves as pressure ‘from above’ by imposing social and reputational costs on states that violate human rights. Terman (2023) has shown in his research that states are more likely to criticise their geopolitical rivals than states considered allies, even though criticism and condemnation from like-minded states would be seen as more credible and could have a greater impact than that from rival states. Political leaders who publicly denounce antagonistic governments know in advance that their criticisms will have limited or no influence, but they also seek social recognition for the mere act of making them, whilst at the same time seeking to undermine the prestige of those they condemn. To this relational approach to the issue of condemnation, Salvia (2021) adds that the demand for respect

for human rights also depends on the extent to which they are upheld in the state criticising third parties, and on the avoidance of applying double standards to different countries.

This article has been framed from a critical geopolitical perspective. Critical geopolitics focuses on the construction of geopolitical discourse by institutional and governmental actors, academics and theorists, as well as popular and popularising voices, with the aim of analysing specific representations of the world that have a significant impact on the formulation of foreign policy. Critical geopolitics relies on discourse analysis to examine who constructs it and how, contributing significantly to identifying both explicit and hidden objectives in foreign policy and to unmasking their rhetorical justification (O'Tuathail and Agnew, 1992; O'Tuathail, 1996; Flint, 2007; Cairo, 1993). In this context, according to McGregor (2005), 'discourses on human rights constitute powerful narratives within geopolitical scripts, having become institutionalised on a global scale and being used to selectively classify, compare and admonish states'. Therefore, this article will analyse the discourse developed by the Turkish ruling elites since 2002 at the United Nations General Assembly, convened annually in New York, with the aim of identifying which human rights are emphasised and in which parts of the world their observance or violation is noted, in accordance with the prevailing Turkish geopolitical perspectives.

2 The evolution of the Turkish political regime

To contextualise the content of this article, it seems appropriate to make a brief but substantial reference to the evolution of the Turkish political regime during the years under study and the situation regarding fundamental rights and freedoms in the country. Their strengthening, or, conversely, their erosion, will have an enormous impact when it comes to endorsing and sustaining a normative discourse on human rights by the Turkish elites in the international arena.

Türkiye is a country that has been accustomed for decades to a multi-party system and electoral dynamics. The party tradition dates back to the Ottoman Empire. Shortly after the proclamation of the Republic in 1923, an authoritarian single-party regime was established, led by the Republican People's Party (CHP), which would govern the country until after the Second World War. The alternation of power came in 1950, when the Democratic

Party (DP), a splinter group of the CHP itself, won the elections. The successive *coups d'état* carried out in 1960, 1971 and 1980, however, had a significant impact on the political system (Sayari, 2002).

The 1980 *coup d'état* led to widespread systematic repression led by a military junta that ruled the country for three years and outlawed all political forces. The country resumed holding elections in 1983, but the process of democratic opening and liberalisation resulted in an incomplete transition (Rodríguez *et al.*, 2014). The resulting regime was a flawed democracy, with serious limitations on the exercise of fundamental rights and duties and under the tutelage of the army. Despite this, significant, albeit sporadic and incomplete, reforms were carried out during the 1980s and 1990s. However, the major window of opportunity for the democratisation of the system was brought about by the declaration at the 1999 Helsinki European Council, which recognised Türkiye as a candidate country for accession and established a roadmap for the opening of negotiations, which were to begin in 2005. The impetus given to Türkiye's EU candidacy by the tripartite government of Bülent Ecevit and, crucially, by the single-party AKP government that succeeded it in 2002, ushered in a new era of democratisation and liberalisation, which significantly curtailed state oversight and broadened the scope of fundamental rights and freedoms, such as freedom of association.

This reformist spirit stalled during the AKP's second term in office and took an authoritarian turn from 2013 onwards following the Gezi protests. At that point, the regime began to take on the characteristics of a flawed democracy, once again restricting civil and political rights and becoming delegative, as it was unable to guarantee a proper balance of powers (Rodríguez *et al.*, 2014). From 2015 onwards, academic literature began to make significant use of the 'competitive authoritarian regime' categorisation for the Turkish political system (Somer, 2016; Akkoyunlu, 2017; Esen and Gümüşçü, 2016; Yılmaz and Turner, 2019; Özbudun, 2015; Bayulgen *et al.*, 2018; Sözen, 2019; Aydın-Düzgit, 2020). Furthermore, following the attempted coup in 2016, a purge took place that affected not only individuals associated with the religious community of Fetullah Gülen—accused by the government of having orchestrated the coup—but also a wide range of actors from very different spheres (Aydıntaşbaş *et al.*, 2016).

During the state of emergency that followed the attempted coup, a referendum was called to replace the country's semi-presidential

system with a presidential system that concentrated all executive powers in the presidency, which in turn saw its legislative powers and influence over the judiciary increase (Adar and Seufert, 2021). The Venice Commission (2017) expressed concern about the scope this text provided for the establishment of a personalist and authoritarian regime.

Since then, general and presidential elections have been held in 2018 and 2023, which have reaffirmed President Recep Tayyip Erdoğan's hold on power and the AKP's dominant position in the Assembly, thanks to the formation of electoral alliances with other political parties.

The judicial harassment recently faced by the main opposition party, the CHP, which has led to the imprisonment of its future presidential candidate and current mayor of Istanbul, Ekrem İmamoğlu, has raised alarm bells regarding the possibility of a further hardening of the regime that could evolve into a system of hegemonic authoritarianism, in which there is no viable opposition alternative (Aksoy and Çevik, 2025).

Towards the end of 2024, a window of opportunity opened to negotiate the dissolution of the Kurdistan Workers' Party (PKK), designated as a terrorist organisation by Türkiye, the EU and the United States, and to address Kurdish political and cultural demands. This process enjoys strong parliamentary support, which, unusually, includes the ultra-nationalist party of Devlet Bahçeli, historically opposed to recognising collective rights for the Kurdish population. PKK leader Abdullah Öcalan called for the party's dissolution and an end to the armed struggle. Since then, a 51-member parliamentary commission has been established to propose and oversee the political and legal reforms intended to advance this peace process (Politico, 2025).

This opportunity, however, is set against a backdrop of democratic decline, highlighted by various international organisations, which may significantly constrain its future and scope. If we examine some of the world's most reputable rankings in the field of rights, freedoms and democratic quality, Türkiye, according to Reporters Without Borders (RSF) (2025), ranks 159th out of 180 countries in 2025 in terms of press freedom; in 2011–2012, it ranked 100th out of 139. The Freedom House report (2025) classifies it as a 'not free' country, scoring its standing on political rights at 17/40 and on civil liberties at 16/60. Whilst Norway has an overall score of 99/100, Türkiye, for its part, scored

only 33/100 in 2025. Added to this is the Bertelsmann Stiftung Transformation Index of 2024¹, which points to a deterioration in the democratic quality of the Turkish political system, which has reportedly gone from being classified as a moderate democracy in 2014 to a moderate autocracy today. The European Commission's annual report on Türkiye, published in November 2025, noted, in turn, that 'the implementation and enforcement of fundamental rights are insufficient and deteriorated during the period under review. Türkiye urgently needs to bring its human rights legislation and anti-terrorism legislation, as well as their implementation, into line with European standards, the ECHR, the case law of the ECtHR and the recommendations of the Venice Commission' (European Commission, 2025: 33).

All these data point to a process of autocratisation that is not a phenomenon exclusive to Türkiye, but rather forms part of a growing global trend (Aksoy and Çevik, 2025).

3 Türkiye's foreign policy under the AKP government

Turkish foreign policy had already undergone greater diversification before the AKP came to power in 2002. Traditionally, the Turkish establishment had focused primarily on its European and transatlantic partners and, on numerous occasions, had subordinated itself to the role of acting as a bulwark against Soviet influence as part of the Western Bloc. This did not, however, prevent friction from arising with the United States or with the countries of the European Economic Community, of which Türkiye was an associate member, nor did it prevent the door from being opened to closer ties with third countries and other regional areas. In the 1980s, Prime Minister Turgüt Özal significantly intensified relations with regions such as North Africa and the Middle East, broadening the scope of foreign policy. With the collapse of the USSR, he consequently took the opportunity to strengthen ties with the former Soviet republics in the Caucasus and Central Asia with which Türkiye shared the greatest cultural and linguistic affinity. Özal was advised by figures such as Cengiz Çandar (between 1991 and 1993), who, in 2001, together with Graham Fuller, articulated in their article 'Grand Geopolitics for a New Türkiye' the need to propose a new foreign policy approach that drew on the Ottoman past and helped to shape a more inclusive

¹ See: <https://bti-project.org/en/reports/country-dashboard/TUR>

and diverse national identity, both within and outside Türkiye, helping to expand the rigid and monolithic state vision. For these two authors, Turkish foreign policy had been shaped by a rigid security-focused approach heavily centred on the perception of threats. The new landscape resulting from the end of the Cold War presented Türkiye with the opportunity to become 'the region's great emerging power', a Türkiye that needed to move beyond its strictly 'Western orientation'. The country had to leave behind the negative aspects of the Ottoman period, particularly its imperial attitudes, but it had to 'emphasise the positive aspects of its past coexistence with a remarkable variety of peoples and religions' and demonstrate 'a global outlook that looked in all directions, north, south, east and west' (Çandar and Fuller, 2001). Çandar is regarded as the promoter of the term 'neo-Ottomanism' in Türkiye, albeit with a very different meaning from that which would be ascribed to it in later years under the AKP government (Yanık, 2011; Çolak, 2006).

In the 1990s, the Turkish ruling elite promoted a hybrid identity discourse in which it emphasised both its European and Asian sides and positioned itself as a bridge between these two worlds. Foreign Minister Ismail Cem, who held the post in successive governments from 30 June 1997 to July 2002, was characterised by his efforts to improve relations with neighbouring countries and to continue promoting a multidimensional foreign policy, without abandoning the Western anchor (Atmaca, 2024).

The AKP government maintained this expansive approach, marked by intense activism in this sphere. Its commitment to opening negotiations with the EU—a goal it achieved in October 2005—did not prevent it from fostering relations with other neighbouring regions, including Africa and the Middle East. This activism was channelled through soft power tools, visa liberalisation, economic agreements, the development of new trade routes and, through mediation efforts in regional conflicts (Rodríguez and Lois, 2022). In 2010, in fact, Türkiye and Finland launched the 'Mediation for Peace' initiative within the United Nations to strengthen preventive diplomacy in conflict resolution and secure more funding for such mechanisms.

With the outbreak of the Arab Spring, the AKP shifted its focus to the new regime changes taking place in neighbouring countries, favouring relations with political parties linked to the Muslim Brotherhood. This period was characterised by taking sides in the region's conflicts and by a growing reliance on hard

power, as evidenced by unilateral operations such as those carried out in Syria from 2016 onwards (Balta and Ozel, 2021: 541; Tüysüzoğlu, 2014: 95). During this period, the prominent figure of Ahmet Davutoğlu, who served as Minister of Foreign Affairs from May 2009 to August 2014, deserves special mention. His work *Strategic Depth* advocated for asserting Türkiye's role in the Arab-Islamic world, defined by its status as the heir to the Ottoman Empire, its geographical location, and its cultural and religious influence. Although this approach was also coined with the term 'neo-Ottomanism', Yanık (2011) and Torbakov (2017) help to highlight the differences with the first wave of neo-Ottomanism exemplified by Çandar's vision. Davutoğlu resolutely promoted Turkish hegemony in the region. Although this shift in priorities did not initially damage relations with European countries, it is worth noting that following the Gezi protests in 2013, the ruling elite began to develop an anti-Western discourse that was markedly more nationalist and defensive (Kaliber and Kaliber, 2019).

The attempted coup in 2016 further eroded relations with European countries and the United States. The Turkish president directly accused the US administration of having instigated the coup and criticised European countries for their lukewarm or lack of support on the night of the coup. This new context would favour Türkiye's rapprochement with Russia and China, in the first case for security and economic reasons and in the second for mainly economic reasons. Whilst the foreign policy of the previous era had been characterised as neo-Ottomanist, during this period analysts will highlight the Eurasian shift towards these two states (Atmaca and Torun, 2022; Erşen, 2019). In the second half of the decade, Türkiye's conflicts with neighbouring countries intensified across a wide range of fronts, from the Arabian Peninsula to the Eastern Mediterranean. Turkish government spokesperson İbrahim Kalin went so far as to champion 'Türkiye's cherished solitude' (Çevik and Seib, 2015).

Various factors, including the economic crisis that affected the country from 2018 onwards and the influence of US policy in the Middle East—which, among other objectives, promoted the establishment of the Abraham Accords—favoured a change of course that helped improve relations with neighbouring countries, leading, above all, from 2021 onwards, a period of normalisation that redirected Turkish foreign policy towards new avenues of dialogue and economic and commercial cooperation, including

with governments such as that of Egypt, which had not been recognised following the coup against Mohamed Morsi in 2013 (Duran, 2022; Yeşiltaş and Özdemir, 2022; Çevik, 2024).

The war in Ukraine has boosted Türkiye's role on the international stage, given its privileged relationship with both the Ukrainian and Russian governments; indeed, it has acted as a facilitator in negotiations for the exchange of prisoners of war and for the export of Ukrainian grain abroad. According to Ulas (2025), Turkish foreign policy, in this instance, has adopted a 'strategic ambiguity' that has allowed it to maintain flexible and contradictory positions, thereby preserving its autonomy and influence amongst rival powers. The impact of the attack carried out by Hamas on 7 October in southern Israel—classified as a series of war crimes and crimes against humanity—and the Israeli government's response has been very different. Faced with its indiscriminate attacks on the civilian population and the obstruction of humanitarian aid entering the Strip, the Israeli government is currently on trial at the International Court of Justice for genocide. Although the Turkish government initially called for de-escalation and condemned the loss of civilian lives, developments in Gaza led to an escalation of rhetoric between the Turkish and Israeli governments, a clear erosion of their recently normalised diplomatic relations, and the imposition of unilateral economic sanctions by Türkiye. It was, however, other Arab countries, such as Qatar and Egypt, that played a leading role in the initial negotiation processes between the parties (Rodríguez, 2025). Donald Trump's second term in the White House has ushered in a new scenario. Faced with a highly precarious ceasefire that has been violated on numerous occasions, preparations are underway for a second phase in which Türkiye will form part of the Committee that will oversee the Gaza Strip in the next stage—the scope of which remains uncertain—where the deployment of international forces authorised by United Nations Security Council Resolution 2803 is being considered. Although the Israeli government has been reluctant to accept Turkish intervention, the good relations between Trump and Erdoğan could pave the way for it (Çevik, 2025a).

Türkiye is often regarded as an emerging middle power (Jordaan, 2003), characterised not only by its growing regional prominence, but also by its quest for influence at the international level. This positioning is accompanied by a revisionist perspective on the global order, calling for greater weight to be given to the

countries of the Global South and promoting alternative alliances and coalitions (Tepeciklioğlu and Tepeciklioğlu, 2021; Kubicek, Dal and Oğuzlu, 2015). In its pursuit of greater international status, it has resorted to hard power, soft power and coercive diplomacy, through both multilateral and unilateral channels.

A clear example of this quest for international status was Türkiye's candidacy for a non-permanent seat on the United Nations Security Council for the 2009–2010 term, for which it did, in fact, secure support. As for the need so often cited by the Turkish government to reform the United Nations, thereby altering the established international order, this is summed up in the famous slogan of the Turkish president, Tayyip Erdoğan, 'the world is bigger than five', which has been repeated time and again at the United Nations General Assembly since 2014.

4 The discourse of the Turkish political elites on human rights at the sessions of the United Nations General Assembly from 2002 to 2025

In this section, a detailed analysis will be carried out of the speeches delivered by Türkiye's political representatives at sessions of the United Nations General Assembly from 2002². The analysis will adhere to the established categories of first-, second- and third-generation rights, as well as the narratives of victimisation, accountability or shaming, and the justifications employed. All of this will enable us to outline the geopolitical representation of the human rights situation on the international stage and Türkiye's role therein, as perceived by its ruling class.

In the discourses, we will analyse those parts of the text that make clear reference to some of the first-, second- or third-generation human rights. There are regions and countries that appear repeatedly in the discourses, but these will only be taken into account if their mention refers to these issues. A catalogue of the first two generations of rights can be found in the International Covenant

² The following are the names of the representatives, their positions and the years in which they participated in the United Nations General Assembly: Şükrü Sina Gürel, as Deputy Prime Minister and Minister of Foreign Affairs, in 2002; Abdullah Gül as Deputy Prime Minister and Minister of Foreign Affairs in 2003, 2004 and 2006, and as President in 2008, 2010 and 2013; Recep Tayyip Erdoğan as Prime Minister in 2005, 2007, 2009 and 2011, and as President in 2014, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024 and 2025; Ahmet Davutoğlu, as Minister of Foreign Affairs in 2012 and as Prime Minister in 2015.

on Civil and Political Rights and the International Covenant on Economic, Social and Cultural Rights³. Third-generation rights are not categorised in this way, nor has an *ad hoc* covenant been created to encompass them; however, in accordance with legal doctrine and interpretations, the right to peace, to a healthy environment, to sustainable development, the right to self-determination, to humanitarian aid, to territorial sovereignty and to natural resources has been incorporated into this sphere. The right to democratic government has also been included in this third category, understood as a collective right that draws on the fundamental individual rights and freedoms enshrined in the International Covenant on Civil and Political Rights, linked to the right of peoples to self-determination. Refugee rights have also been included, as this is a right that implies solidarity and international cooperation (Falcón and Tella, 2003; Bonet de Viola, 2016; Luño, 2014; Rey Marcos, 2013). In the analysis, a distinction will be made between the assessments made regarding individual economic and social rights and the emphasis placed by speakers on the right to sustainable development of certain regions and countries, as a collective right.

The analysis begins with the speech by the Minister of Foreign Affairs of the last government to lead the country before the AKP came to power⁴, Şükrü Sina Gürel, who in 2002 began by referring to terrorism (it should be remembered that the 11 September attacks had taken place the previous year), stating that: 'It cannot be confined to or identified with any particular culture, race, religion or geography', and defining it 'as the most blatant violation of human rights'. References to terrorism are found regularly throughout the years analysed, pointing to specific organisations or geographical areas that will be identified in the analysis.

In his speech, the minister will pay particular attention to three regions—the Balkans, the Middle East and the Caucasus—which are especially important to Türkiye as they are located in 'our part of the world'. These regions appear without fail in all speeches up to 2025.

³ The International Covenant on Civil and Political Rights is available at the following link: <https://share.google/ncnSE0X6jBEDbo9FY>; The International Covenant on Economic, Social and Cultural Rights is available at the following link: <https://share.google/qPQpZyuiZwnE2j7Si>

⁴ The coalition led by Prime Minister Bülent Ecevit governed from 1999 to 2002, becoming the 57th Government of the Republic. Sina Gürel was its last Minister of Foreign Affairs. Since then, governments have been formed by the AKP following the victory of its candidates in successive general or presidential elections to date.

4.1 The Balkans, the Middle East and the Caucasus

With regard to the Balkans, Minister Gürel (2002) set the tone for the statements that would follow in subsequent years: 'Now is the right time for the word "Balkans" to be freed from its negative connotations and to come to represent positive concepts such as ethnic harmony, mutual respect and peaceful coexistence'. In these statements, particular attention is paid to the establishment of viable state institutions in Bosnia and Herzegovina and the development of a peaceful transition in Kosovo (Gül, 2006). Indeed, the Turkish government supported Kosovo's independence (Erdoğan, 2011) and, subsequently, the normalisation of relations between Kosovo and Serbia (Erdoğan, 2023), as well as the integration, in general, of the Balkan countries into Euro-Atlantic institutions (Erdoğan, 2017). The speeches also highlight Türkiye's role in international peacekeeping missions in the region; Erdoğan's statements in 2024 are in line with this:

'We play a constructive role in promoting the prosperity and peace of the Balkans, of which we are an integral part, and we act in close cooperation with all actors in the region. As members of the Steering Board of the Peace Implementation Council, we emphasise in all forums the importance of the sovereignty, political unity and territorial integrity of Bosnia and Herzegovina, and we continue to contribute to Operation EUFOR-ALTHEA. Furthermore, we continue to successfully exercise command of KFOR, which we assumed last year, and we support the Belgrade-Pristina dialogue process⁵.

Another area consistently highlighted in the speeches is the Middle East. And, within this framework, the Palestinian-Israeli conflict will play a unique role, 'the heart of the problems in the Middle East' (Gül, 2006), 'the root of all evils' in the region for Erdoğan (2007). Over the years, a clear shift in tone and the articulation of a new framework for addressing the issue can be observed in the speeches. In the words of Foreign Minister Sina Gürel (2002), reference is made to the terrorist attacks suffered by the Israeli population, without clearly naming the perpetrators, and

⁵ Following the negotiation of the Dayton Peace Agreement in November 1995, a Peace Implementation Council (PIC) was established to assist with the implementation of the terms agreed at Dayton. Türkiye was a member of its Executive Committee. For its part, Operation EUPHOR-Althea is a military operation under the auspices of the European Union for the stabilisation and integration of Bosnia and Herzegovina. KFOR, meanwhile, is a NATO-led International Security Force for Kosovo.

to the abuses of power suffered by the Palestinians at the hands of 'Israel'. 'Violence persists, causing enormous losses on both sides' (Gürel, 2002). In these statements, as in subsequent ones, Turkish representatives presented themselves as mediators willing to contribute to the resolution of the conflict, following the so-called 'roadmap'⁶ (Gül, 2003). This 'mediating role was, in fact, evident in the indirect peace talks that Syria and Israel initiated under Türkiye's auspices in May 2008 (Gül, 2008).

Relations with Israel soured significantly following Israel's attacks on Gaza during the so-called Operation Cast Lead between December 2008 and January 2009. In his address to the United Nations General Assembly in 2009, Erdoğan, as Prime Minister, referred to the attack in these terms:

'The aggression against Gaza carried out in late 2008 quickly turned into a human tragedy and resulted in the deaths of nearly 1,400 people, most of them women and children, as a result of phosphorus bombs. More than 5,000 people were injured and Gaza's infrastructure was completely destroyed'.

The speech did not explicitly name those responsible for the aggression, but it did emphasise the humanitarian tragedy in the Strip. The then Prime Minister also pointed to the need to resume talks between Israelis and Palestinians and highlighted Türkiye's mediating role in the Middle East peace process (Erdoğan, 2009).

A genuine shift in tone can indeed be observed in Erdoğan's address, also as Prime Minister, to the United Nations General Assembly in 2011. In this speech, Israel is explicitly mentioned and accused of failing to comply: 'To be honest, the problem in this context is caused by the Israeli government. Those who govern the country take measures every day which, rather than paving the way to peace, erect new barriers to achieving it. Therefore, it is the Palestinian territories that are under occupation, not Israeli territory'. In this speech, the cause of this change in tone is made explicit: the 2010 assault in international waters on the Mavi Marmara, in which nine people were killed, who were part of a humanitarian flotilla seeking to break the blockade imposed on Gaza.

⁶ The 'roadmap' was a plan proposed by the 'Quartet' (the United States, the Russian Federation, the European Union and the United Nations) in 2003, setting out stages and deadlines to address the Palestinian-Israeli conflict and bring an end to the occupation of the territories.

'What we demand of Israel is clear. Israel must apologise, pay compensation to the families of our martyrs and lift the blockade of Gaza. Until Israel meets these demands and takes steps in this direction, our stance will not change. Let me also emphasise from this podium that we have no problem with the people of Israel. Our problem stems from the aggressive policies of the current Israeli government' (Erdoğan, 2011).

Relations between Türkiye and Israel improved in 2013, when Prime Minister Benjamin Netanyahu apologised for 'the mistakes that may have led to the loss of human lives' (The Guardian, 2013) during the raid on the flotilla; indeed, on 28 June 2016 a reconciliation agreement was signed between the two countries, ending six years of a diplomatic deadlock, in which Israel agreed to pay the families of the Mavi Marmara victims compensation of around twenty million USD, whilst the Turkish government, for its part, agreed to withdraw the lawsuits filed against the Israeli soldiers involved in the raid. However, no progress could be made on lifting the maritime blockade imposed by the Israeli government on the Gaza Strip, but Türkiye was permitted to deliver humanitarian aid via the Israeli port of Ashdod (Deutsche Welle, 2016).

Relations between the two countries became strained again in 2018, following US President Donald Trump's decision to move the US embassy to Jerusalem. At least sixty Palestinians who took part in protests against the move were killed by Israeli security forces. The arrival of a new government in Israel in 2021, as well as the impetus given by the US administration to the process of normalisation between Israel's neighbouring states, fostered a rapprochement with Türkiye, which in 2022 resulted in the restoration of diplomatic relations at the highest level between the two countries⁷ (Goren, 2022).

The speeches by Turkish leaders before the United Nations General Assembly reflected these ups and downs in relations. It is worth noting, as a new development, that in his 2015 address, Ahmet Davutoğlu introduced a new line of discourse in his references to the Arab-Israeli conflict, highlighting the protection of the holy sites located on the Temple Mount as a fundamental part of the peace process. This discourse ties in with the position put forward by Davutoğlu during his time as Turkish Minister of

⁷ See: <https://www.euronews.com/2022/08/17/turkey-and-israel-mark-milestone-by-restoring-full-diplomatic-ties>

Foreign Affairs, explained in greater detail in a previous section, in which he advocated a more decisive role for Türkiye in the Middle East, given its status as the heir to the Ottoman Empire, its geographical position, and its cultural and religious ties with neighbouring countries. The Turkish leadership sought to position the country as a leading figure in the Sunni Muslim world in this context.

The attacks of 7 October and the Israeli response once again strained relations between the two countries. In 2022, Erdoğan stated: 'As Türkiye, we are determined to continue developing our relations with Israel for the sake of the future, peace and stability not only of the region, but also of Israel, the Palestinian people and our own', in his speeches in 2024 and 2025 he accused the Israeli government of committing ethnic cleansing and genocide, and of having completely lost control. He also criticised, without specifying, the countries supporting Israel, accusing them of becoming its accomplices. Regarding the actions taken by Türkiye, he emphasised its humanitarian role, the economic and trade sanctions imposed on Israel, and its support for the genocide case brought by the Republic of South Africa before the International Court of Justice. In his 2024 speech, he clarified: 'We oppose anti-Semitism just as we oppose attacks on Muslims solely because of their beliefs. Our problem is with the Israeli government's policies of massacre' (Erdoğan, 2024).

These statements reveal how relations between the two countries—which have shown enormous resilience despite all the ups and downs—have been decisively shaped by the situation in the Occupied Palestinian Territories. This tough and forceful rhetoric against the Israeli government also allows Türkiye to connect with a significant segment of domestic society and enhance its prestige in the Arab-Islamic world (Çevik, 2025b).

When referring to the Middle East, another key country due to its importance to Türkiye—as a neighbour and the role it will play in interventions, particularly since the Arab Spring—is Syria.

In the initial phase, the speeches by Turkish representatives at the UN on the Arab region took on a certain tone of optimism. Thus, Erdoğan (2011) noted: 'We are witnessing a historic process of transformation and change in the Middle East'. The Arab Spring seemed to open the door to a complete political reconfiguration in North Africa and the Middle East, allowing for the formation of new governments led by Islamist parties aligned

with the Turkish elites. For the Turkish president, Abdullah Gül, as late as 2013: 'the advances in the region, including Tunisia, Libya and Egypt, are irreversible'. This was despite the fact that a *coup d'état* had already taken place in Egypt, overthrowing the Muslim Brotherhood government. This *coup d'état* ultimately led to a breakdown in relations with Egypt, and diplomatic contacts between Türkiye and Egypt at the highest level were not re-established until ten years later.

Turkish Prime Minister Tayyip Erdoğan took a stance in favour of the uprisings from the very outset in his 2011 address to the United Nations: 'The era of governments that fail to meet the legitimate needs and expectations of their people, and of administrations that oppress and repress their people and do not give the highest priority to justice, has come to an end'. In this speech, whilst he praised the democratic transitions in Egypt, Tunisia and Libya, he nevertheless denounced the actions of Bashar al-Assad's government in Syria as 'unacceptable' and called on it to heed the 'people's call for democracy' (Erdoğan, 2011). These statements also implicitly acknowledged the good relations that Erdoğan's government had enjoyed with the Syrian government, towards which it gradually adopted a harsher tone as the situation in Syria worsened. The following year, Foreign Minister Davutoğlu stated: 'The people of Syria have continued to suffer the brutality and tyranny of the Damascus regime over the past 18 months' (Davutoğlu, 2012). He thus clearly identified the victims and the perpetrators and explicitly called for the regime's downfall. A year later, Gül condemned the Syrian government's use of chemical weapons and demanded that: 'The perpetrators of this crime against humanity must be held to account and brought to justice' (Gül, 2013).

A significant shift in the narrative occurred in 2015, when Davutoğlu, in his capacity as prime minister, identified two new actors in the Syrian civil war—this time non-state actors—in addition to referring to al-Assad as 'a vicious tyrant'. The first was the self-styled Islamic State (Daesh) and the second, the Kurdistan Workers' Party (PKK), which he described as terrorist groups. In this speech, the then Prime Minister advocated establishing a security zone or protected area in Syria, a proposal that would be repeated in subsequent speeches. The Prime Minister also called for border controls on foreign fighters heading to the neighbouring state. Indeed, Türkiye had been heavily criticised, not only by European countries but also by Arab countries in the region, for

having become a transit point for these foreign fighters seeking to join Daesh in either Syria or Iraq (D'Alema, 2017).

The Turkish government's rhetoric shifted between 2016 and 2018, coming to justify direct military interventions such as Operation Euphrates Shield (OES), which took place between August 2016 and March 2017. The victims cited continued to be displaced civilians, refugees and residents of conflict zones, whilst the perpetrators identified included Bashar al-Assad, Daesh, the PKK and the People's Protection Units (YPG), forces affiliated with the PKK in Syria. The Turkish president linked the Turkish Army's military operations to the defence of human rights, the safety of the civilian population, the safe return of displaced persons and the liberation of territories. Türkiye presented itself as a military and humanitarian actor in the region. In these discourses, the use of hard power and soft power was justified.

In the first phase of Operation Euphrates Shield, the Turkish government argued that the intervention would have a limited geographical and temporal scope, with the aim of protecting the border and fighting Daesh. However, over time, the operation expanded its objectives. Gurcan (2019) has noted in this regard that another of the operation's 'implicit' aims was to prevent the territorial continuity of the Kurdish cantons under the Autonomous Administration of North and East Syria (AANES), initially known as Rojava.

In explaining the objectives of Operation Euphrates Shield, the Turkish president told the United Nations General Assembly: 'It became clear that, with the launch of that operation, the priority of the terrorist organisation the Kurdish Workers' Party, or the Kurdish Democratic Party, is not to fight Daesh' (Erdoğan, 2016). This comment was intended to discredit the image of the People's Protection Units (YPG), which had gained international renown in Syria for their fight against Daesh, particularly following the siege of Kobane in northern Syria, which was successfully repelled by Kurdish forces (Soler i Lecha, 2014–2015). The Syrian Democratic Forces (SDF) were, in fact, formed in October 2015, following the siege of Kobane, as a multi-ethnic military alliance, supported by the United States, with the primary aim of confronting the self-styled Islamic State. The core of the SDF, however, was the YPG and the Women's Protection Units (YPJ). The Turkish government regarded, and continues to regard, the SDF as an extension of the PKK in Syria, and this has been a major source of friction with the United States over the support granted to this armed coalition.

In 2017, Erdoğan accused the Democratic Union Party (PYD) and its armed wing, the YPG, of 'altering the demographic structure of the regions it has conquered, confiscating the property of the population and murdering or exiling those who oppose it', which constituted 'a crime against humanity'. Opposition to the establishment of the autonomous Kurdish entity in Rojava will be total, as it is perceived as a threat to national security (International Crisis Group, 2025). Contributing to all this was the collapse of the peace negotiations in Türkiye between the PKK and the Turkish government in 2015, which triggered a new spiral of violence with serious consequences within the country and a high human cost (International Crisis Group, 2016; Dinc and Ozduden, 2023).

Discussions on Syria also highlighted Türkiye's role as a humanitarian actor in hosting refugees.

'We are currently hosting 4 million refugees within our borders, 3.5 million of whom come from Syria. On a global scale, this is unprecedented. These refugees have access to every kind of service one might need. To date, the Republic of Türkiye has spent some 32 billion dollars on refugee care' (Erdoğan, 2018).

Alongside humanitarian efforts, military actions were justified to protect the civilian population from Daesh, the PKK, the PYD and the YPG, with the aim of 'liberating' territories in order to establish safe zones 'for millions of Syrians'. In this regard, the president also highlighted the Sochi agreement reached with Russia to prevent attacks in Idlib and thereby avert a potential new wave of refugees (Erdoğan, 2018).

In the following years (2019–2023), these ideas were reinforced, highlighting the growing number of refugees at its borders and Türkiye's role in addressing the humanitarian crisis caused by the civil war in Syria. It is also worth noting that references to the return of Syrian refugees to their country began to appear. The 2018 Turkish elections had highlighted a growing anti-refugee discourse in Türkiye, particularly among opposition parties. In fact, the Turkish president (2019) explicitly acknowledged that the country 'cannot withstand another wave of migration'. Whilst the government did not alter the main thrust of its welcoming rhetoric, it began to take measures to facilitate the return of refugees⁸. The president also declared the intention:

⁸ In fact, Amnesty International and Human Rights Watch investigated cases of forced deportations from Türkiye to Syria in 2019. See: Uras (2019).

'to establish a peace corridor in Syria, 30 kilometres wide and 480 kilometres long, where we hope, with the support of the international community, to facilitate the resettlement of 2 million Syrians. If we succeed in establishing this safe zone, we could confidently resettle between 1 and 2 million refugees' (Erdoğan, 2019).

In this context, military operations in Syria were justified on the grounds that the return of refugees is only possible to 'zones liberated' by Türkiye outside the control of the regime and of 'terrorist organisations such as the PKK-YPG and Daesh' (Erdoğan, 2019).

Alongside the military factor, Türkiye's humanitarian role continued to be defended, whilst the EU was criticised for its lack of financial support, despite the EU-Türkiye Migration Agreement reached in 2016, for having closed its doors to Turkish refugees and for violating the rights of asylum seekers (Erdoğan, 2019).

At this time, he also criticised, without specifying which countries, for supporting 'terrorist organisations in the region and using them as subcontractors on the ground', implicitly expressing his opposition to US support for the SDF (Erdoğan, 2021).

With the surprise fall of the al-Assad regime, in his 2025 address, Erdoğan expressed his explicit support for the transitional government, made up of opposition forces with whom the Turkish government had established significant ties during the Syrian civil war, and thanked the Gulf states for their collaboration in the prospects for the neighbouring country's reconstruction. It is worth noting that Erdoğan downplayed Türkiye's leading role in the regime change in order to secure the widest possible support for this new situation in Syria.

The Syrian civil war had an enormous impact on neighbouring Türkiye, which explains the importance accorded to its various ramifications in the speeches. The crisis with the al-Assad regime was exacerbated by the repression of protests, and the breakdown in relations went so far as to call for his overthrow. In the speeches studied, this is one of the most striking cases of international shaming. As has been observed, humanitarian considerations and references to human rights were also inextricably linked to national security concerns and geopolitical perceptions of the conflict.

Another Middle Eastern country that features repeatedly is Iraq. The main concerns regarding this country are summarised in the 2004 speech by Foreign Minister Abdullah Gül:

'The humanitarian, political and security challenges facing the Iraqi people continue to negatively impact one another. It goes without saying that events in Iraq are also affecting my country and causing suffering to my people, whilst, as we are a neighbouring country, most of Iraq's humanitarian needs are being met through Türkiye. The Iraqi transition does not merely affect the fate of the Iraqi nation. It affects the future of peace and prosperity throughout the region and beyond. That is why Türkiye strongly supports a united, territorially intact and democratic Iraq, an Iraq that is at peace with itself and with its neighbours'.

Over the years, the search for multilateral solutions with neighbouring countries was advocated, in some cases under the auspices of Türkiye (Gül, 2004).

From 2014 onwards, a shift in rhetoric can be observed, which also emphasised security concerns: 'Iraq has now become a haven for terrorist organisations' (Erdoğan, 2014), and concern over the possible arrival of new waves of refugees from that country as a result of the military clashes in Mosul (Erdoğan, 2016). In 2017, the Turkish government opposed the independence referendum launched by the autonomous government of the Iraqi Kurdistan Region in September of that year, which also lacked the support of other countries in the region, the United States and European nations. Türkiye advocated for the territorial unity of Iraq, prioritising this over other principles such as self-determination in this specific context.

In the speeches, no mention is made of the Turkish military deployment in Iraq (Çevik, 2022), and a call is made for 'genuine cooperation from the international community and Iraq regarding the dismantling of the PKK terrorist organisation, which has established itself in Iraq, just as happened with Daesh' (Erdoğan, 2020).

In 2024, a new aspect was introduced: the promotion of the Development Road Project, a proposal to integrate the region logistically and economically with Iraq and Türkiye with the aim of connecting Asia with Türkiye by land, serving as an alternative to the Suez Canal and as a route for 'collective development' (Erdoğan, 2024). 'The stability, security and prosperity of our neighbour Iraq are of great importance for peace in our region', Erdoğan continued to maintain in his 2025 address.

In addition to Iraq, other Middle Eastern countries mentioned in the messages to the Assembly in relation to the issues at hand are

Yemen, Saudi Arabia and Lebanon. As for Yemen, without mentioning specific actors, Erdoğan noted in 2020 that: 'History will not forget those who covet Yemen's sovereignty, political unity and territorial integrity with the intention of gaining influence in the region, nor those who turn a blind eye to the ongoing suffering of the Yemeni people'. In the case of Saudi Arabia, mention is made of the murder of the journalist Jamal Khashoggi, presented as a serious violation of human rights (Erdoğan, 2019). Türkiye linked Prince Mohammed Bin Salman to this incident. These accusations significantly strained the inter-state relations between the two countries, and Saudi Arabia implemented an informal boycott of Turkish imports. In 2022, within a new context that facilitated the normalisation of bilateral relations, the journalist's case was transferred to Saudi Arabia, a move that was heavily criticised by human rights defenders as it cast serious doubt on the guarantees of due process (Çevik, 2024).

References to Lebanon, meanwhile, are framed within a fundamentally humanitarian and multilateral perspective, highlighting support for Security Council Resolution 1701 adopted in 2006. In that same year, the Minister of Foreign Affairs, Abdullah Gül, hoped 'that the ceasefire would lead to a lasting peace for the Israeli and Lebanese peoples'. That year, Türkiye's diplomatic and humanitarian response was also highlighted, as was the country's support for United Nations mechanisms to halt the fighting. In 2024 and 2025, however, Erdoğan will express solidarity with Lebanon in the face of Israeli bombardments, moving away from the more balanced stance of previous years. Lebanon will also be mentioned as a host country for refugees in the region (Erdoğan, 2014).

Alongside the Balkans and the Middle East, the South Caucasus is frequently mentioned, with relations between Azerbaijan and Armenia over Nagorno-Karabakh playing a central role. It is interesting to note the evolution in the discourse of Turkish representatives before the United Nations General Assembly. Initially, the emphasis was on the importance of resolving territorial conflicts in the region—such as Nagorno-Karabakh—through peaceful means based on UN resolutions, territorial integrity and regional cooperation, even linking the resolution of this conflict to the normalisation of relations with Armenia. Along these lines, the then Foreign Minister, Abdullah Gül, spoke in 2003 and 2006. The tone shifted more markedly in 2011 in a speech by Erdoğan as Prime Minister when he declared: 'The illegitimate occupation of

Azerbaijani territories, which has been going on for many years, must end. It is unacceptable to allow the Nagorno-Karabakh conflict to remain unresolved to the extent that it is today'. However, this condemnation did not explicitly mention Armenia. Gül, in his capacity as president, would return to a conciliatory tone in 2013, proposing: 'A comprehensive strategy of economic cooperation and development, combined with a gradual withdrawal from the occupied territories' as a way out of the conflict. In 2020, Erdoğan, Gül's successor as president, accused Armenia of having attacked Azerbaijani territories and of being 'the greatest obstacle to lasting peace and stability in the South Caucasus'. In 2021 and 2022, Erdoğan defended Azerbaijan's military recovery of territories as an act of 'self-defence' that had resulted in the 'end of the occupation of its territory', presenting it as an opportunity 'in the region for lasting peace'. Whilst the Turkish president's remarks (2023) highlighted Türkiye's special alignment with Azerbaijan as 'one people, two states', they also underscored his support for negotiations between Azerbaijan and Armenia, in which the Trump administration has also been involved (Erdoğan, 2024; 2025). Azerbaijan's annexation of Nagorno-Karabakh in 2023 and the subsequent displacement of the Armenian population from the enclave drew harsh criticism from institutions such as the Lemkin Institute and the European Parliament⁹, which branded it as ethnic cleansing. In the speeches analysed, however, there are no mentions of the consequences of the annexation for the civilian population, which is consistent with states' reluctance to raise human rights issues affecting countries considered allies (Terman, 2023).

4.2 Human rights in other regions of the world

Having analysed the speeches focusing on the Balkans, the Middle East and the South Caucasus, this section will focus on the other countries and regions mentioned in relation to human rights.

In South Asia, interventions consistently highlight the situation in Afghanistan in humanitarian, security and political terms. They emphasise Türkiye's presence and leadership within the International Security Assistance Force (ISAF), its role in training Afghan security forces and in the country's reconstruction efforts. Calls for international solidarity are constant (Gürel, 2002; Gül,

⁹ See Oskanian (2025) and Harazim (2023).

2004; 2006). From 2021 onwards, following the withdrawal of US troops from the region, emphasis was placed on the need to provide the country with humanitarian aid regardless of the political regime, and on concerns regarding the possibility of a new wave of refugees potentially arriving in Türkiye (Erdoğan, 2021). In 2025, the Turkish president pledged to 'support our Afghan sisters and brothers in the future, as we have done before'. His appeal to the current government: 'it is our greatest wish that the current administration in Afghanistan adopts an approach that embraces society and upholds the common values of humanity' presents Türkiye as a country that could serve as an intermediary with the Taliban regime, justified on humanitarian grounds and in the interests of regional stability.

Also regarding South Asia, there are references to other conflicts such as that in Kashmir between India and Pakistan. In 2019, Erdoğan lamented the situation of the population: 'Kashmir remains under siege and eight million people remain trapped in Kashmir; they cannot leave'. His proposals to resolve this situation call for dialogue between the parties and reveal a Türkiye with a neutral stance on the conflict (Erdoğan, 2022; 2023; 2025).

In Southeast Asia, the situation of the Rohingya in Myanmar will take centre stage. Since 2012, Foreign Minister Ahmet Davutoğlu has been denouncing the 'desperate humanitarian need' of the Rohingya Muslims. In subsequent years, he lamented their humanitarian situation in the refugee camps in Bangladesh and the massacres committed in Rakhine State, where crimes against humanity and genocide were documented (Erdoğan, 2017; 2019). The perpetrators were not explicitly mentioned in the speeches. He also criticised the international community for 'as in the case of Syria [...] not having presented itself in a favourable light'. In response to this, Türkiye's diplomatic role is highlighted, aimed at 'helping to resolve this crisis as well', alongside its humanitarian efforts through the Turkish Cooperation and Coordination Agency (TIKA) and the Turkish Red Crescent, and even the personal involvement of the Turkish president's family in the refugee camps in Bangladesh (Erdoğan, 2017).

Furthermore, in this region of Asia, it is important to note that, in recent years, the Turkish elite has consistently expressed concern for the rights and freedoms of the Uyghurs, invoking historical and human ties, whilst always emphasising the importance of China's sovereignty and territorial integrity, and avoiding a

hostile stance towards that country (Erdoğan, 2021; 2022; 2023; 2024).

In the Eastern Mediterranean, the Cyprus conflict undoubtedly stands out as a constant point of reference. In the early years, Türkiye advocated for the United Nations settlement plan sponsored by Kofi Annan, which was also supported by the Turkish part of the island in the referendum held in 2004. Despite the rejection of the UN plan for the reunification of the island, the southern part of Cyprus, the only part internationally recognised as the Republic of Cyprus, was accepted as a member of the European Union, whose institutions had also supported the reunification plan. Turkish officials advocated for years for the continuation of negotiations, despite the failure of the 2004 referendum, and for an end to the isolation of the Turkish Cypriot side, a position also previously defended by the European Commission. The significance of the discovery of new gas reserves in the Eastern Mediterranean was presented by Turkish President Erdoğan (2017) as a window of opportunity for regional cooperation and integration. To this end, he proposed a regional conference, including the Turkish Cypriots, in which 'the rights and interests of the countries in the region would be taken into account' (Erdoğan, 2020). In fact, Türkiye had been excluded from the Eastern Mediterranean Gas Forum founded in 2019 in Cairo. From 2021 onwards, the discourse shifted towards an explicit defence of sovereign equality and international recognition of the Turkish Republic of Northern Cyprus, whilst also asserting the rights of Turkish Cypriots to the energy resources of the Eastern Mediterranean. In 2025, Erdoğan reiterated these two main ideas: the call for an Eastern Mediterranean Conference and the recognition of the Turkish Republic of Northern Cyprus as a state. It is worth noting that in the early years, despite the Cyprus issue remaining unresolved, good relations with Greece were viewed very positively (Gül, 2004). However, in 2022, Erdoğan would harshly criticise Greece, stating: 'In addition to its inhumane pushbacks of irregular migrants in the Aegean Sea, Greece, a member of the European Union, has been implementing discriminatory and oppressive policies against the Turkish Muslim minority, in violation of its legal obligations'.

In the Eastern Mediterranean region, it is also worth noting the emergence of Libya in the discourse, initially in the context of the Arab Spring, where support was given to the National Transitional Council and the view was put forward that 'Libya and its resources

belong to the Libyans' (Erdoğan, 2011). However, it is from 2019 onwards that references to the country take on greater prominence. Turkish discourse on Libya is based on a normative approach in support of the self-determination of its citizens and the pursuit of stability: 'We strive to ensure security and stability in the country by establishing a democratic administration based on the free will of the people' (Erdoğan, 2019). A year later, the Turkish president justified Türkiye's intervention in the country as follows:

'The attacks launched by the coup plotters in Libya last year to overthrow the legitimate Government of National Accord have brought nothing but pain and destruction to this country. The international community has failed to ensure that neither the coup plotters nor their supporters have been held to account for the massacres, human rights violations and, in particular, the mass graves in Tarhuna. Türkiye has been the only country to provide a concrete response and to support the legitimate Libyan government's request for assistance' (Erdoğan, 2020).

In this statement, Türkiye's alignment with one of the parties and its intervention in the conflict are justified, although there is no explicit mention of the perpetrators. Support for Libyan national sovereignty, its unity and territorial integrity, and the holding of 'free and credible elections' remained a feature of Erdoğan's discourse, including in 2022. A year later, the focus shifted to the humanitarian aid provided by Türkiye following the floods that devastated the country in 2023.

Libya has gained in geostrategic importance for the Turkish government, particularly since the second decade of the 2000s, due to its oil resources, its significance for Turkish construction companies and its location in the Eastern Mediterranean, at a time of new gas exploration. In fact, in 2019, two memoranda were signed: one on military cooperation and another on the delimitation of exclusive economic zones in the Mediterranean, which was strongly rejected by countries such as Greece, as it overlaps with maritime areas claimed by that country. Türkiye's support has been key to halting the advance of Marshal Khalifa Haftar, the main rival of the Tripoli government (Rodríguez, 2022). In Erdoğan's speeches at the United Nations, a discursive strategy can be observed aimed at legitimising and normalising the Turkish presence in Libya and portraying Türkiye as a guarantor and supportive actor on the international stage.

In the European sphere, meanwhile, mention must be made of references to the war in Ukraine since 2015. Davutoğlu (2015) defended Ukraine's territorial integrity, the protection of the Tatar minority in Crimea and the principles of the Minsk agreements. The war in Ukraine will be mentioned again from 2022 onwards, with calls for dialogue and diplomacy to resolve the conflict, based on Ukraine's independence and territorial integrity and Türkiye's role as a facilitator between 'our Russian and Ukrainian friends' and alongside the United Nations to promote, among other issues, the export of Ukrainian grain via the Black Sea (Erdoğan, 2022; 2023; 2024). This diplomatic work was also highlighted in the Turkish president's speech in 2025. In this instance, Türkiye's intervention to facilitate the exchange of prisoners and the bodies of soldiers killed in the conflict was emphasised.

The African continent has also played a very significant role in various speeches since 2003. The focus will be on issues related to second- and third-generation rights, such as the right to education, the fight against poverty and sustainable development. Türkiye's role as a donor country with a significant humanitarian role will be emphasised; Foreign Minister Abdullah Gül (2006), for example, claimed that Türkiye had been recognised by the World Food Programme as one of the continent's largest food donors. In this context, the work of TİKA and the Türkiye-Africa Cooperation Summits will be highlighted. Also, Türkiye's participation in peacekeeping forces in collaboration with the United Nations and the EU (Erdoğan, 2007; 2022). The discourse promotes a horizontal narrative, in which Türkiye is presented as 'an equal partner' (Erdoğan, 2022). The situation in the Sahel is specifically mentioned in Erdoğan's 2023 address, adding a security focus and highlighting the need for a democratic government in Niger as soon as possible.

Two conflicts, however, will feature prominently: those in Somalia and Sudan. In addressing them, emphasis will be placed on the resulting humanitarian crises without explicitly naming the perpetrators. In 2011, Erdoğan described the crisis in Somalia as a tragedy resulting from many years of civil war, international neglect and colonial legacies; he denounced human rights violations as crimes against humanity and promoted the establishment of a democratic and cohesive state capable of tackling piracy and terrorism. In 2017, Erdoğan stated that 'Türkiye has so far spent USD 1 billion on the reconstruction of Somalia' and reiterated the government's support for combating terrorism in that country

in his speech in 2025. Since 2024, the situation in Sudan and its serious humanitarian consequences have also been explicitly addressed; the Turkish president advocated for a collective effort to end the conflicts in Sudan and ensure humanitarian aid for the displaced Sudanese population (Erdoğan, 2024; 2025).

This section of the analysis concludes by highlighting cross-cutting issues that feature prominently in the various speeches analysed.

In the discourse of Turkish officials regarding first-generation rights, there are repeated statements against racism, xenophobia and, in particular, Islamophobia. At certain times, calls are made to strike a balance between preserving the right to freedom of expression and respect for religions (Gül, 2013). In this context, it is also common for anti-Semitism to be condemned. Both are designated as crimes against humanity by Erdoğan in his 2014 address; in recent years, he has supported the establishment of a World Day Against Islamophobia, which coincides with the anniversary of the attack on a mosque and an Islamic centre in Christchurch, New Zealand, on 15 March 2019.

The discourse in favour of equality and the empowerment of women also appears in various speeches (Gül, 2006; 2010; Davutoğlu, 2015); however, it is noteworthy that this eventually disappears. In its place, another narrative will emerge that emphasises the need to protect the family, as the fundamental unit of society, with a more traditionalist and conservative outlook, which will also have a significant impact in the domestic sphere. The Turkish president announced in 2025 that Türkiye had joined the United Nations Group of Friends of the Family. For its part, Türkiye was the first country to withdraw from the Istanbul Convention on preventing gender-based violence in 2021, although it had been the first to ratify it. It was argued that the treaty disregarded family values (Eldiario.es, 2021).

As for economic and social rights, references are also common to growing inequality at the international level and the widening gap between the poorest and the wealthiest strata of society. In the sphere of third-generation rights, there are constant references to the right to sustainable development, the protection of refugees and the risks posed by climate change, particularly for regions with fewer economic resources. Hence, the statements by Turkish representatives emphasise Türkiye's role as a humanitarian actor. In 2017, Erdoğan told the United Nations

General Assembly that Türkiye, having allocated six billion USD to humanitarian aid and cooperation in 2016, had become the world's second-largest donor country. This aid has been sent to many different parts of the world, including areas less frequently mentioned in speeches, such as Latin America and the Caribbean (Erdoğan, 2023), which helps to project its image as a global actor.

Conclusions

The speeches analysed are consistent with the categorisation of Türkiye as an emerging middle power, seeking a prominent role on the international stage. Türkiye's role as an emerging middle power is also evident through its use of hard power, soft power such as the Alliance of Civilisations or the Peace Mediation Initiative, and coercive diplomacy, carried out through both multilateral and unilateral actions.

References to the defence of first-, second- and third-generation human rights help to bolster its status as an actor and also allow us to identify its geopolitical priorities and those that are directly linked to issues considered fundamental to its domestic policy. These also reveal the general evolution of Turkish foreign policy, which during the period analysed opted for a 'zero problems with neighbours' policy and mediation tools in the early years of government, before shifting to taking sides in various regional conflicts, adopting more critical stances towards Western countries, and advocating a more explicit defence of the rights of Muslim communities from the second half of the 2000s onwards.

The selection of places mentioned reveals the importance attached to the immediate region—such as the Balkans, the Middle East and the South Caucasus—from before the AKP came to power to the present day. In the Balkans, the focus is on regional peace and institutional stabilisation in both Bosnia and Herzegovina and Kosovo.

In the Middle East, the countries that will feature most prominently in the speeches, both in terms of duration and scope, are Israel and Syria. It is precisely in these two countries that the speeches will explicitly refer not only to the victims of human rights abuses, but also to the perpetrators. Relations with these countries will, in the first case, be severely eroded and, in the second, completely severed from the previous regime, due to

issues related to human rights—not as the sole factor, but one that will play a significant role in the equation. Added to these were geopolitical perceptions of Türkiye’s role in the region and domestic considerations.

At this point, the thesis defended by (Terman, 2023) is confirmed, namely that it is easier to carry out ‘shaming’ or the highlighting of human rights violations committed by state or non-state actors considered rivals or enemies than by countries considered allies or like-minded. Thus, in the South Caucasus, the Turkish government will clearly align itself with the Azerbaijani government, reserving its criticism exclusively for the Armenian government.

Finally, its image as a humanitarian and committed actor—sometimes in stark contrast to a selfish and, on certain occasions, harmful West—is presented as an alternative model that aims to strengthen its presence and leadership not only in the region but also globally. The democratic erosion of its political system, reflected in relevant studies, analyses and international rankings, nevertheless undermines the impact of this international image.

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Chapter Five

Türkiye in the Middle East

Andrés de Castro García

Abstract

This article analyses Türkiye's geopolitical evolution from the Ottoman Empire to the current multipolar era, emphasising the Ottoman worldview (*Din ü Devlet*) that shapes its strategic realism. It explains the origins of NATO and the EU as asymmetrical structures where democratic principles are selective, tolerating illiberal moments in Türkiye's history and subsequently stalling its accession to the EU under the pretext of 'principles and values'.

In the Middle East, it highlights the importance of the Kurdish question and the historical moment of Daesh, periods in which Türkiye prioritised its national interest over idealistic Western narratives.

He concludes that Türkiye has anticipated multipolarity, diversifying its alliances and strengthening itself, whilst explaining how there is an opportunity for Spain to adopt a pragmatic realism for bilateral relations that are beneficial to both.

Keywords

NATO, EU, Multipolarity, Realism, Türkiye.

Historical introduction

The Ottoman Empire has received considerable academic attention from leading intellectuals over the past few centuries. Among them, Howard's (2017) contribution is particularly significant. This is especially true for his emphasis on the relationship between its history and its worldview, shared largely by Muslims, Christians and Jews, and comprising three layers.

The first of these is the Ottoman dynasty, the family of the Ottoman sultans, who possessed *Din ü Devlet*. *Din* is spiritual energy, the encounter between the human soul and God. Whereas *Devlet* is charismatic authority, the capacity to lead, to bring victory and prosperity. The aim of these powers was to facilitate the material and spiritual prosperity of the peoples under the dynasty's care. To a large extent, Ottoman politics consisted of the relationship between the Ottoman peoples and their sultans and their extended family. As Howard (2017) notes, its functioning changed as the public image of the Ottoman family evolved and, with it, the definitions of identity, loyalty and belonging.

The second of these was the concepts of prosperity and success and the appropriate strategies for achieving them. At the fiscal level, the Ottoman dynasty did not view the economy as an impersonal or independent category, but rather as an expression of material success that stemmed from both dynastic power and spiritual commitments. Thus, they allowed people to make decisions regarding their own well-being, as the circumstances of the late agrarian era in which the Ottoman Empire flourished, and its existing capabilities in transport and communications technology, compelled them to do so, whilst also inviting them to exercise prudence—a concept closely aligned with the realist theory of International Relations (Baqués, 2023). Leaving imperial rhetoric aside, absolutism was not something that empires of the agrarian era could easily implement. The Ottoman government generated grand ideas and, at times, made intrusive demands under threat of punishment. However, the more distant the province, the more likely it was that patience and a willingness to negotiate would be rewarded. Rationality prevailed in the form of government.

The third layer consisted of the set of spiritual convictions described above. Thus, when studying Ottoman literature, one observes the pervasive melancholy that accompanies loss, but one also perceives a sense of naturalness and humour. Despite

earthquakes, epidemics, droughts, famines, storms and fires. But also war and slavery. And the passage of time. And yet, for Ottoman writers and readers, transient reality, in all its apparent randomness, ultimately provided a complete description of the divine.

Furthermore, it is important to highlight the geopolitical significance of history (Burles, 2025) and the perspective afforded to the leaders of a state by having played a pre-eminent role in a particular part of the world. In this regard, it is worth recalling that, during the sultanate of Suleiman the Magnificent in the 16th century, the borders of his Empire were shared with those of King Charles I to the east (the Ottoman west) and extended to the Persian Gulf and the Red Sea, having subjugated Arab, Persian and Slavic peoples. Muslims, Christians and Jews. This is of great significance in relation to other empires and actors and lends the border factor crucial importance (Altić, 2022).

An understanding of the combination of historical motivations and the shaping of the Turkish character through the legacy of the Ottoman Empire must be a constant. Thus, an effort to analyse each of these stages could enrich a study which, due to limitations of time and space, will focus on the process that emerged from the mid-20th century onwards.

1 NATO (1952), 'values', opportunity cost, alliance of civilisations and multilateralism (EU)

Following the end of the Second World War and the onset of the bipolar era (1945–1989), the United States (US) and the Union of Soviet Socialist Republics (USSR) established their spheres of influence through military alliances: the North Atlantic Treaty Organisation (NATO) and the Warsaw Pact, respectively.

In the case of NATO (1949), its Treaty states that there is a common heritage and civilisation among its peoples based on the principles of democracy, individual freedom and the rule of law. It is true that the definitions of democracy and individual freedom were, then and now, quite heterogeneous. For they applied in 1949, for example, to Salazar's *Estado Novo* (1933–1974) and to the reign of Haakon VII of Norway (1905–1957). And, in 1952, to the Türkiye of Celâl Bayar, who had ended the one-party system twenty-one months before his country's accession to NATO.

In the case of the Warsaw Pact (1955), there was no need to mention democracy, but rather the importance of friendship, cooperation, mutual assistance and the principles of respect for the independence and sovereignty of states and the principle of non-interference in the sovereign affairs of other states.

Beyond the rhetoric of both sides, the truth is that the structure of the organisations allowed the US and the USSR to consolidate their power within their spheres of influence. In the case of Türkiye, which is neither an Atlantic nation nor located in the north, the United States sought to prevent it from falling into the hands of its strategic rival. This would have granted it access to the Black Sea, with crucial borders with the Middle East and the Balkans. In return, Türkiye gained protection against Soviet ambitions for control or territorial expansion and was placed under the same strategic umbrella as Greece, one of its traditional rivals. This prevented the latter from using the Alliance against it.

This is why neither NATO nor the US seemed particularly concerned about the rise of the *Demokrat Parti*, which, following the 1954 and 1957 elections, curtailed press freedom and other individual liberties until the gallows brought an end to Prime Minister Menderes's days on 17 September 1961. There is photographic evidence of this, including the signed death warrant hanging around his lifeless neck.

The subsequent stages were not all particularly peaceful and included the 1971 military memorandum by which the armed forces ousted the government of the time. In this context, the US Central Intelligence Agency produced a document entitled 'Türkiye: Winter of Discontent', in which it clearly states that '[...] the restoration of American military assistance to Greece demonstrates once again that Washington does not oppose military regimes *per se*' (CIA, 1971: 13). It should be remembered, in this regard, that the Junta of Colonels ruled Greece between 1967 and 1974.

Years later, in 1980, the Turkish Armed Forces staged another *coup d'état* and established a military regime that lasted until 1983. In none of the cases outlined above did either the United States or NATO express any kind of criticism of the situation. The founding principle of democracy and individual freedoms served, as has been demonstrated, a declaratory and propagandistic purpose. This is not confined, as has been shown, to Türkiye, but extends, at the very least, to Portugal and Greece.

In parallel with this process of establishing spheres of influence, structures began to emerge that were not only military in nature, but also economic. Initially, this took place through the European Coal and Steel Community (ECSC), which was a condition imposed on Europe to continue with specific elements of the Marshall Plan (Carolan, 2008), as outlined in the work of Dean Acheson, Secretary of State during the Truman presidency. In fact, the US was the first and main non-member to recognise the ECSC on 11 August 1952 and to grant one hundred million USD in loans¹.

The fact that, following the collapse of the USSR and the end of the bipolar era, the EU and NATO expanded into Eastern Europe almost consecutively also helps to explain how both mechanisms strengthen US power on the European continent (Diesen, 2024). This argument therefore challenges the prevailing perception in Europe that visionaries such as Jean Monnet, Robert Schuman, Jacques Delors and Konrad Adenauer had a dream of a better world. An independent dream, without an owner, without a puppeteer.

All of the above is important for understanding the pragmatism of the great powers. The United States and the Soviet Union during the bipolar era. Maintaining the rhetoric whilst acting pragmatically in terms of interests. Democracy is the guiding principle of foreign policy, yet non-democratic regimes are fostered. And, in the case of the USSR, the system is supposedly based on respect for sovereignty, yet Hungary is invaded in 1956.

However, with the advent of the unipolar era (1989–2014), the United States began to believe in the 'end of history' (Fukuyama, 1989) and no longer considered it necessary to maintain a foreign policy aimed at preventing disasters. This was because it did not believe its dominance had an expiry date. This moment is crucial for European integration, as the 'carbon copy' process that ensues suggests that NATO and EU member states are essentially the same, with a few minor exceptions.

Two years before the onset of the unipolar era, in 1987, Türkiye applied for membership of the European Economic Community and in 1999 was granted candidate status. This year, moreover, coincided with the accession of Poland, Hungary and the Czech Republic to NATO.

¹ See: <https://history.state.gov/historicaldocuments/frus1952-54v06p1/d194>

Accession negotiations began in 2005, after Türkiye had made significant efforts to reorganise its state apparatus and even its academic system to establish university courses aimed at training a bureaucratic elite capable of representing Türkiye's interests before the European Union. After years of negotiation, the Council decided in 2018 to suspend negotiations due to alleged shortcomings in the democratic system, respect for fundamental rights and the independence of the judiciary². The real reasons include conflicts with Greece and Cyprus. Germany's reluctance to cease being the most populous state and, therefore, the most represented, and Türkiye's status as a predominantly Muslim and Asian (non-Western) country. One might well question, however, the Western nature of the other candidate countries. Even of non-countries, as is the case with the Serbian province of Kosovo.

However, all these situations were already known when the 'Alliance of Civilisations' initiative was launched, conceived by the government of President Zapatero and the then Turkish Prime Minister Recep Tayyip Erdoğan, and well received by the global multilateralist establishment at the United Nations. In this case, under Secretary-General Ban Ki-moon.

However, the most significant factor was the end of the unipolar era and the need for Türkiye to seek a new playing field that would not have to bear the burden of pseudo-elites within the structures of an ideologised European Union, immune to any intellectual understanding of the changes that have been taking place in the world over the last twelve years (2014–2026) in the context of the multipolar era (De Castro, 2025). Nor of the previous ones, with less serious implications.

Thus, Türkiye has set out to be a geopolitical actor capable of adapting to multipolarity. In fact, it has been one of the actors that best foresaw the shift in global power structures and has planned its interests ahead of the other NATO countries.

In this regard, it is important to recall the speech given by the Prime Minister of Canada, Mark Carney, in January 2026 at the World Economic Forum in Davos:

'We knew the story of the international rules-based order was partially false—that the strongest would exempt themselves when convenient, that trade rules were enforced asymmetrically. And we knew that international law was applied with

² See: https://enlargement.ec.europa.eu/countries/turkiye_en

varying rigour depending on the identity of the accused or the victim.

This fiction was useful, and American hegemony, in particular, helped provide public goods, open sea lanes, a stable financial system, collective security and support for frameworks for resolving disputes.

So, we put the sign in the window. We took part in the rituals, and we largely avoided pointing out the gaps between rhetoric and reality. This bargain no longer works. Let me be blunt. We are in the midst of a rupture, not a transition³.

Türkiye was aware that there was a difference between rhetoric and reality and that there was no rules-based international system, as asymmetry undermined the integrity of the system. The Prime Minister says that 'the fiction was useful'. It was useful for Canada, but not for Türkiye, as it found itself excluded from that group and decided to strengthen itself, remaining in NATO for whatever suited it whilst at the same time bolstering its security apparatus with both internal and external objectives.

In short, liberal hegemony and the inane mental umbrella of liberalism, false at its core and rotten to its foundations, has destroyed Western hegemony (De Castro, 2022).

2 Türkiye and its spheres of influence: the Middle East

Whilst the concept of ethnicity is particularly difficult to grasp for a population such as the Spanish, which does not form part of an ethnic group, the notion is particularly important for Turkish society. This is because in Türkiye, ethnic Turks coexist with other groups, such as the Kurds.

This issue has generated tensions for centuries and has posed a challenge for the Turkish security apparatus, both within and beyond its borders. Perhaps the most significant example is that of the Kurdistan Workers' Party (PKK), regarded by many as a terrorist group and, by others, as a means of advancing political interests.

However, in the West, as a result of the infantilisation of analysis, a general lack of understanding of how the world works, and the

³ See: <https://www.weforum.org/stories/2026/01/davos-2026-special-address-by-mark-carney-prime-minister-of-canada/>

naivety that characterises a significant portion of its population—following decades of economic prosperity—a romanticised view of the PKK has also emerged, much as ETA was viewed by certain groups. This also extends to the situation in other regions of the world, such as the Tupamaros in South America (Bordas, 2015).

Thus, the element of protection against attacks from liberals on the right and left —democratic socialists— in the sense used by, for example, Mayer (2024) when suppressing internal and external threats, particularly during the unipolar era, has characterised the way in which their external discourse is constructed and has made them feel vulnerable to forces that are difficult to control, both by the states issuing them and due to internal implications. And the greater the weakness, the greater the need for state force. This is a dynamic misunderstood by most liberals, yet one that has produced precisely the opposite effect to that desired by them.

In the scenario that has emerged since 2014—a year that can be said to mark the beginning of multipolarity—the situation in Syria and Iraq is particularly significant for Türkiye and for the rest of the world.

In that year, DAESH, an Arab-Sunni armed group, seized control of a vast swathe of territory in Syria and Iraq. Bashar al-Assad's Syria and an Iraq controlled by the Kurds of the KDP and PUK in the north (Erbil and Sulaymaniyah, respectively), and by predominantly Shia parties in the south, proved incapable of controlling their entire territory.

In this historical context, the United States, many European countries, the Russian Federation, Iran, Hezbollah and other actors identified DAESH as a common enemy. This 'coalition' also included Kurdish militias in both Syria (YPG) and Iraq, creating a difficult situation for Türkiye, whose direct enemies were fighting against DAESH.

This scenario was analysed in great detail in a publication by the United States Air Force (USAF) (De Castro, 2020a), which explores the importance of US support for the YPG, as an affiliate of the PKK, and the position in which Türkiye finds itself in this scenario. In this context, Türkiye also benefited from the weakening of state structures in Syria and Iraq in terms of their capacity for regional dominance, although this had to be offset against the negative impact of migration flows, for which it received funding from the European Union. Obviously with the

aim of keeping them in their camps and preventing them from entering EU territory, despite the rhetoric on openness and the importance of human rights, thereby highlighting the contradiction of Western liberalism.

Furthermore, the aforementioned article highlights the mistake of deploying *proxy* forces in a region unfamiliar to the West (the Middle East) and argues that for the Syrian Kurds, the best-case scenario (2020) would have been to reach an agreement with the Assad government, rather than attacking it, particularly following the 'Olive Branch' operation in January 2018, in which Türkiye attacked Syrian Kurdish targets on Syrian territory by both air and land, with the aim of weakening or ending Syrian Kurdish self-government and also sending a message to the Kurds in northern Iraq (De Castro, 2020b) who had decided to hold a referendum in September 2017 despite opposition from the United States.

The Kurdish question is one of the key elements in the relationship between Türkiye, Syria and Iraq. The explanation lies in the difference between a realist structure of state organisation, based on national interest, and a structure such as that which was hegemonic in the West until recently, based on 'principles and values' that are applied unevenly and ultimately lead to disorder and a loss of power.

At present, Türkiye is fully aware of Israel's importance in the region, and of that country's ties to the United States (Mearsheimer and Walt, 2007), and is therefore seeking to capitalise on the opportunities arising from the changes.

Thus, first and foremost, the main consequence of the new Syrian president, Ahmed al-Charaa (Abu Mohamed al-Golani), taking control over the Syrian Kurds stands out. The Syrian government aims to end the situation of Syrian-Kurdish self-rule, having learnt the lessons regarding the importance of controlling the entire national territory. Türkiye sees this as an advantage, as it has a Kurdish population sympathetic to the PKK within its territory, but no indigenous Arab population, and therefore does not pose a threat.

Furthermore, the Syrian government's current challenges do not prioritise Türkiye, but rather focus on the challenge of internal control, preparing responses against potential attacks from Russia, China, Iran and Syrian groups with conflicting interests. In addition to other states viewing the Israel-Syrian government agreement with concern, there is Western support that appears

inconsistent with ‘principles and values’, adding yet another notch to the long list of inconsistencies. Western support is likely to shift, with statistical probabilities far outweighing conflicting interests with Türkiye.

In the case of Iraq, the aim is to counterbalance Shia power in Baghdad through relations with the KDP and the PUK, particularly at a commercial level. This involves the purchase of hydrocarbons and the sale of goods and services. Household appliances, food and construction, respectively. It also ensures the ability to intervene against groups linked to the PKK, regardless of which parts of its structure have been demobilised, as the political problem persists in terms of ethnic and political tensions between different groups.

Liberal left-wing groups in the West (democratic socialists) will continue to support Kurdish parties and groups, including armed ones, due to the traditional perspective on oppressors and the oppressed and the classic reductionism of those who fail to understand a complex reality (De Castro, 2021). Furthermore, this approach is detached from the importance of the national interest in their own country.

3 A look to the future and implications for Spain

Spain’s relationship with Türkiye, within the regional context of the Middle East, must be based on realism and the exploration of common interests to be shared on a mutually beneficial basis: a *win-win situation*.

The 2004 Common Position, based on supposed common interests, has turned out to be idealism on the Spanish side and realism on the Turkish side. However, the realism of other actors, such as Germany, has prevented Türkiye from finally becoming part of the European Union.

It is within this framework that Türkiye’s foreign policy has staked its claim on the end of liberal hegemony and has managed to avoid the negative consequences of attacks by the West, whilst consolidating its power in the East, serving as a bridge between the two worlds—Türkiye’s natural geopolitical sphere, a country that presents itself as bi-continental and the heir to an empire—and what is now a leading player in armaments, for example in the field of drones. It has managed to establish itself in the multipolar world both as a buyer and a seller and is a necessary player in the Middle East and North Africa.

Spain has strategic interests in Türkiye, particularly in the banking sector, and could explore joint industrial ventures in both civilian sectors such as the automotive industry and in the security and defence industry.

However, if the concept of 'principles and values' re-enters the equation and Spain were to launch a public information campaign to justify this situation, the current landscape of alternative information flows would dispel the smokescreen and, with it, the prospects of exploring a relationship that could be beneficial to both parties.

The all-too-obvious decline of multilateralism and the loss of trust among states in NATO and the EU (both internally and externally) leads us into a world where realist analysis (without necessarily referring to prescription, as that is another debate) leaves no room for any other approach if the aim is to uncover the truth.

Therefore, international anarchy has never ceased to be a feature, even if the West had no need to perceive it, as it lay outside the European garden, which now lies fallow, and that is why some fail to fully appreciate either its delightful sensory qualities or its floral splendour.

Force, and not 'principles and values', settles international conflicts. As the great Roman jurist Ulpian, born in Tyre around 170 AD, reminds us: *Quod principi placuit, legis habet vigorem*. That which the prince wills has normative force. The importance of power, which ended his own life in the year 228 AD, and which does not seem to have had many negative legal consequences despite the immorality of the act and its contradiction of 'principles and values'.

States are the actors in international relations. In contrast to the dreams of certain social engineers and naive pseudo-intellectuals with a penchant for being puppets, searching for the most mediocre puppeteer they can find and ignorant of the world in which they live. Its rules and characteristics, which are those of our species. In a human nature that does not change. But, as the great Calderón set in stone: 'dreams are but dreams' (Calderón de la Barca, 2018).

Conclusions

The conclusions drawn from the text highlight the relationship between the historical trajectory of the Ottoman Empire, Türkiye's internal evolution and its strategy in the current multipolar era.

Firstly, the Ottoman worldview described by Howard (2017)—centred on the dynasty (*Din ü Devlet*), the concept of prosperity, and the worldview shared by Muslims, Christians and Jews—helps us understand that Turkish politics has never been reducible to purely institutional or legal categories, but is organised around notions of legitimacy, charismatic authority and material-spiritual success that continue to this day.

This conceptual continuity explains, among other things, the enduring importance of the dynastic-personalist dimension of power (now channelled through political leadership) and the centrality of pragmatic realism in decision-making, both domestically and internationally.

Secondly, Türkiye's integration into the Cold War alliance system clearly illustrates the dissonance between the powers' normative discourse and their actual behaviour. The text highlights how NATO was founded on declared principles of democracy and freedoms, whilst tolerating authoritarian regimes in Portugal, Greece and Türkiye itself, as well as repeated military coups (1960, 1971, 1980) which in no case posed a problem for the Alliance, demonstrating the primacy of power over 'principles and values'.

On the Soviet side, there were also inconsistencies between the rhetoric of sovereignty and non-interference, which coexisted with interventions such as that in Hungary in 1956.

The result is that the supposed 'rules-based international order' reveals itself, for actors such as Türkiye, to be a profoundly asymmetrical mechanism: respect for principles is selective and subordinate to the interests of the great powers, which reinforces a realist interpretation of the international system.

This tension became even more evident following the unipolar moment. The end of the USSR and the almost parallel expansion of the EU and NATO into Eastern Europe consolidated US primacy on the continent, whilst fuelling the fiction of an emancipated Europe, built on 'values' rather than power relations. The article shows that Türkiye experienced the limits of this rhetoric: although it was recognised as a candidate country in 1999 and accession negotiations were opened in 2005, the process was frozen in 2018 on the grounds of an authoritarian drift and the deterioration of the rule of law.

However, these democratic deficits were visible long before, and the decision to halt accession is inseparable from geopolitical

factors (tensions with Greece and Cyprus, demographic balance within the EU, cultural and religious identity) that qualify the normative narrative. Once again, practice confirms that power and national interest take precedence over the coherence of principles.

Mark Carney's speech in Davos in 2026, cited in the text, encapsulates this realisation from within the West itself: the explicit acknowledgement that the liberal order was largely a useful fiction, based on the asymmetrical application of rules and the self-exemption of the strongest.

What may have been a 'useful' fiction for Canada was, for Türkiye, an exclusionary framework that denied it full access to the European core whilst demanding sacrifices and strategic alignment. Türkiye's shift towards a more autonomous policy—maintaining its NATO membership whilst diversifying its alliances and room for manoeuvre—can thus be understood as a rational response to the realisation that there is no neutral 'rules-based' arena, but rather a power arena where those outside the inner circle must develop their own capabilities if they wish to avoid vulnerability.

In the Middle East, the Kurdish question and the DAESH episode provide a particularly revealing test case for this contrast between visions. On the one hand, Türkiye has for decades faced an internal security challenge linked to the PKK and the articulation of ethnic identities in territorial terms; on the other, much of Western public opinion and progressive circles tend to interpret the Kurdish militias within a romantic framework of 'oppressed peoples' that obscures the Turkish state's security logic.

In this sense, Western support for the YPG in Syria, as 'proxy' forces against Daesh, placed Türkiye in an awkward position: its internal and border adversaries were simultaneously partners of its formal allies. Hence, Ankara has prioritised a regional strategy centred on the national interest, combining military operations (such as Operation Olive Branch) with tactical agreements with Damascus or Erbil, whilst managing refugee flows in transactional coordination with the EU. The text emphasises that this approach, criticised by liberals, has proved more effective than Western policy based on 'principles and values' applied inconsistently.

All these factors point to one conclusion: Türkiye has been one of the actors that has best anticipated the shift towards multipolarity, adapting its foreign policy to maximise its power in an environment

where neither the waning US hegemony nor the European project can any longer guarantee stability or predictability.

Its dual status as heir to the Ottoman Empire and as a bridge state between Europe and Asia allows it to strike a balance: it is a member of NATO, yet cooperates with Russia on energy and defence; it maintains a tense relationship with the EU on the political front, yet one that is indispensable on migration and trade; it negotiates with Arab and Iranian actors, yet shares only selective agendas with them. This flexibility is underpinned by a historical strategic culture in which strength, prudence and negotiating ability count for more than declared ideological affinities.

As for Spain, the implications are clear. The text suggests that Spanish-Turkish relations have been excessively influenced by idealistic frameworks, such as the Alliance of Civilisations. Whilst Germany and other member states openly prioritise their national interests, Spain runs the risk of becoming trapped in a discourse of 'principles and values' which, when it comes down to it, are scarcely shared by other states when complex issues come into play.

If Madrid wishes to capitalise on the strategic opportunities offered by Türkiye—in banking, the automotive sector, energy, defence and access to markets in the Middle East and North Africa—it will need to reorient its approach towards realism: identifying common interests, building industrial and security projects, and managing differences with pragmatism.

Finally, the text advocates realism not as the only possible course of action, but as the sole analytical tool capable of explaining international anarchy. The reference to Ulpian—'*quod principi placuit, legis habet vigorem*'—and to Calderón—'*los sueños, sueños son*' [dreams are but dreams]—serves as a reminder that power, the will of those in command, and human nature remain the fundamental drivers of politics.

In this sense, the Turkish experience is of great value to Spain and to European countries: clinging to fictions about an order based on universal norms may be intellectually comfortable for those with childish tendencies, but it leads to strategic errors that are costly for everyone.

Recognising the disconnect between rhetoric and reality, as Türkiye has done in most of its approaches, is a necessary condition for developing a foreign policy focused on its national interest.

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Chapter Six

The geoeconomics of Türkiye in Eurasia

Lucía Alberich Lanzas, Elena Gosálvez Frías

Abstract

This paper analyses Türkiye's geoeconomics in Eurasia, understood as the strategic management of trade, energy, investment and connectivity flows to maximise room for manoeuvre in an environment of structural vulnerabilities. Firstly, it examines the internal foundations of the Turkish model under the AKP, highlighting export-led industrialisation and high energy dependence as key determining factors. Secondly, it studies Türkiye's differentiated projection across four regional blocs: the Caucasus and Central Asia, the wider Europe (the European Union and the Balkans), the Middle East and the Black Sea. The analysis shows that Türkiye combines deep productive integration with the European Union, energy and logistical interdependence in the Caucasus, functional diversification in Central Asia, and a compensatory strategy of liquidity and sovereign investment in the Middle East, alongside energy and trade links with the Black Sea region. Overall, the study argues that Türkiye does not seek homogeneous integration, but rather functional diversification aimed at securing critical flows and consolidating its Eurasian geoeconomic centrality.

Keywords

Türkiye, Geoeconomics, Eurasia, Energy, Connectivity.

1 The evolution of the AKP's economic policy: from macroeconomic stabilisation to Türkiye's geoeconomic projection

Türkiye's foreign economic policy under the Justice and Development Party (AKP) has followed a sequential evolution that reflects the adaptation of the Turkish economic model to internal and external structural changes. This trajectory can be analysed through different phases, characterised by varying priorities, instruments and constraints.

Between 2002 and 2008, the priority was macroeconomic stabilisation following the 2001 financial crisis. The new government inherited an economy marked by high inflation, a fragile financial system and a loss of international credibility. The agenda focused on fiscal discipline, structural reforms, trade liberalisation and attracting foreign direct investment, in coordination with international financial institutions and with the European Union as a regulatory benchmark (Öniş, 2012). This period was characterised by sustained growth, a reduction in inflation and a notable increase in FDI (World Bank, n. d. a; n. d. b).

From 2009 until the mid-2010s, the model shifted towards more expansive growth, supported by investment and credit expansion. Following the global financial crisis of 2008, Türkiye recovered its growth relatively quickly, with particular impetus coming from construction, infrastructure and export-oriented industrial sectors. This approach consolidated an investment-intensive pattern, accompanied by a persistent preference for maintaining low interest rates as the main instrument to stimulate consumption and investment. However, this pattern would begin to show structural limitations as the decade progressed.

Since 2016, the model based on investment and cheap credit has shown signs of structural exhaustion. Far from correcting it, the AKP exacerbated the situation by maintaining exceptionally low interest rates, a decision that gradually took shape as an ideological stance against the interest-based system, as Erdoğan recently reaffirmed at the *Global Islamic Economy Summit* in Istanbul (Reuters, 2025). This approach led to growing divergence with international financial institutions, which recommended monetary tightening and the rebuilding of reserves for macroeconomic stabilisation (Gürkaynak *et al.*, 2023). In practice, this approach resulted in persistently negative real interest

rates, as the depreciation of the lira and high inflation systematically outpaced the nominal rates set by the monetary authority.

This stimulus operated, however, against a backdrop of limited productive capacity, marked by structural rigidities, dependence on imported inputs and pre-existing macroeconomic vulnerabilities. These vulnerabilities, already visible from 2018, intensified with the COVID-19 pandemic from 2020 onwards, when disruptions in supply chains and production bottlenecks exacerbated inflationary pressures and supply constraints.

As a functional response to this internal deterioration, Türkiye reoriented its foreign economic strategy towards an increasingly geoeconomic approach. This reorientation involved deliberately diversifying trade and investment partners towards the Middle East, Africa, the Balkans and Central Asia, relying on instruments of economic diplomacy, the internationalisation of Turkish companies and the strategic use of currency swaps to sustain critical trade flows.

However, this outward expansion did not resolve internal vulnerabilities. The Turkish economy developed a strong dependence on external financing and high private-sector exposure to foreign-currency debt, resulting in high macroeconomic volatility, recurrent depreciation of the lira and persistently high inflation, which deteriorated financing conditions (International Monetary Fund, 2013).

Faced with the need to preserve access to external financing (particularly from Gulf countries, but also from international markets), the government implemented a partial normalisation of the macroeconomic framework following the May 2023 elections. This adjustment took the form of a significant tightening of monetary policy, with a cumulative increase in interest rates from 15% to 50% between June 2023 and March 2024, as well as the announcement of a fiscal consolidation path (Organisation for Economic Co-operation and Development (OECD), 2025; U.S. Department of State, 2025). In September 2024, the government formalised this commitment by publishing the Medium-Term Programme (MTP) 2025–2027, which set inflation control and the attraction of foreign direct investment as priority objectives (Republic of Türkiye Ministry of Treasury and Finance, 2024).

This normalisation, however, does not represent a paradigm shift, but rather a tactical adaptation within the aforementioned geoeconomic approach to maintain critical capital flows and credibility

with strategic financial partners. In this latest phase, the objective appears to have shifted from maximising short-term growth to focusing on managing structural vulnerabilities and securing critical flows of trade, capital and energy. Thus, the diversification of partners, the selective attraction of sovereign capital and the control of energy and trade transit are established as central tools of the Turkish strategy (Ülgen and Coşkun, 2022).

2 Industrialisation as a pillar of Türkiye's geoeconomic strategy

Industrialisation constitutes the structural pillar upon which Türkiye's geoeconomic strategy is built, providing the productive base necessary to sustain its international integration and expand its strategic room for manoeuvre. In 2024, the manufacturing sector accounted for 16.8% of Turkish GDP (U.S. Department of Commerce, 2025). This base does not aim for self-sufficiency, but rather for selective integration into regional and global value chains, in line with the strategic objectives defined in the official 'Century of Türkiye' vision and in the 12th Development Plan (Presidency of Strategy and Budget of the Republic of Türkiye, 2023).

The industrial base features a sectoral structure centred on selective specialisations, with a significant weighting in the automotive, household appliances, machinery, metallurgy, chemicals, defence and intermediate goods sectors, which account for a substantial share of industrial value added and exports. In 2024, the manufacturing industry accounted for 94.1% of total exports, reaching a value of USD 261.9 billion (Turkish Statistical Institute [Turkstat], 2025), with a growing share of medium and medium-high technology-intensive segments, which rose from 30.4% in 2002 to 40.3% of manufacturing exports in 2023 (Daily Sabah, 2024; FocusEconomics, 2024). This trajectory demonstrates a gradual process of productive sophistication that has enabled Türkiye to play a significant role in various global value chains and to transition from an economy with a basic manufacturing sector (dominated in the early 2000s by low-technology manufacturing, particularly textiles) to one characterised by more complex manufacturing and services (Aydın, 2025).

The geographical spread of this industrial capacity has been supported by specific institutional mechanisms. Organised Industrial Zones (OIZs) account for a significant proportion of manufacturing employment and export production, facilitating economies

of scale, reducing logistics costs and acting as hubs for attracting domestic and foreign investment (World Bank and Ministry of Industry and Technology of the Republic of Türkiye, 2020). Complementarily, technology parks and tech parks, linked to universities and R&D centres, play a growing role in the strategy of industrial *upgrading* and reducing technological dependencies, concentrating activities in *software*, electronics, defence, dual-use technologies and advanced manufacturing.

Integration into European value chains has been decisive for the consolidation of this productive base. The European Union consistently absorbs around 40–45% of Turkish exports, particularly in the automotive, machinery and intermediate goods sectors, consolidating Türkiye as an industrial link in the European productive space (European Commission, 2025). This anchoring has made it possible to combine competitive costs, geographical proximity and partial regulatory alignment stemming from the 1995 Customs Union, although it has also generated structural dependencies that limit the scope for autonomy in trade policy.

Beyond the European axis, the logistical dimension of this industrial base is increasingly structured around transcontinental connectivity projects. The Middle Corridor, a rail corridor crossing the South Caucasus and the Caspian Sea to connect Central Asia with Europe, positions Türkiye as the western hub of this axis, complementing integration with European supply chains through links to the east. In parallel, the Development Road project with Iraq—a 1,200-kilometre multimodal corridor from the port of Al Faw in Basra to the Turkish border—reinforces Türkiye's reach into the Gulf and links industrial zones along the route as value-added platforms. Both corridors operate as geoeconomic instruments that extend Türkiye's industrial influence beyond its borders, simultaneously integrating the country into multiple Eurasian connectivity axes.

This logistical expansion is complemented by the projection of industrial capabilities into emerging markets. Turkish construction, industrial machinery and defence companies have played a central role in the Middle East, the Balkans, the Caucasus and Central Asia, acting as vectors of economic influence in areas where local institutional and productive capacities face significant limitations. This strategy is driven by a logic of market diversification and the reduction of risk concentration in the European sphere.

3 Energy as a structural vulnerability and geoeconomic lever

This open, export-oriented industrial base presents a key structural vulnerability that shapes Türkiye's geoeconomic projection in Eurasia: its high energy dependence. Türkiye is the second country in the world, after China, whose energy demand has grown the most over the last twenty years (Ministry of Foreign Affairs of the Republic of Türkiye, n. d.). According to the World Bank and Türkiye's Ministry of Energy and Natural Resources, the country imports between 70% and 75% of its total primary energy, making stable access to energy a critical factor for its industrial competitiveness, balance of payments and macroeconomic stability (The World Bank, 2023; Central Bank of the Republic of Türkiye, 2025).

At the same time, Türkiye's geographical position, situated between the Middle East, the Caucasus, Central Asia and Russia—regions that account for around 60% of global oil and gas reserves—enables Ankara to transform this vulnerability into a geoeconomic opportunity, by articulating a strategy based on the diversification of energy suppliers, routes and technologies (Ministry of Foreign Affairs of Türkiye, 2023).

3.1 Managing energy dependence: suppliers, sources and methods

In accordance with Türkiye's official energy policy, the national strategy is structured around a deliberate diversification of sources, supplier countries and supply methods, combining fixed infrastructure with more flexible mechanisms. Due to its high population density and rapid economic growth, Türkiye has been one of the OECD economies with the highest increase in energy demand in recent years (OECD, 2025). This dynamism contrasts with its limited domestic resources, making the energy factor a central determinant of its geoeconomic strategy.

Türkiye's energy consumption structure relies on oil and oil products, natural gas, and coal and coal substitutes, accounting for approximately 30%, 26% and 25% of the total, respectively (U.S. Energy Information Administration, 2024). This energy demand profile explains the country's high degree of external dependence.

The *natural gas* supply combines pipeline infrastructure with flexible supplies of liquefied natural gas (LNG). This system is largely

managed by the state-owned company BOTAŞ, which controls approximately 90% of the supply. In terms of origin, around 75% of imported gas arrives via pipeline from Russia ($\approx 40\%$) through Blue Stream and TurkStream, from Azerbaijan ($\approx 20\%$) via the Trans-Anatolian Natural Gas Pipeline (TANAP) and from the Islamic Republic of Iran ($\approx 14\%$) via the Iran-Türkiye (Tabriz-Ankara) pipeline. The remaining 25% consists of LNG, imported mainly from Qatar, the United States and Algeria via onshore terminals and floating regasification units (FSRUs) (Republic of Türkiye Energy Market Regulatory Authority, 2024).

Against this backdrop of high structural dependence, the discovery of the Sakarya gas field in the Black Sea in 2023 is seen as a positive factor in Türkiye’s efforts to progressively reduce its energy dependence on foreign sources (U.S. Energy Information Administration, 2023).

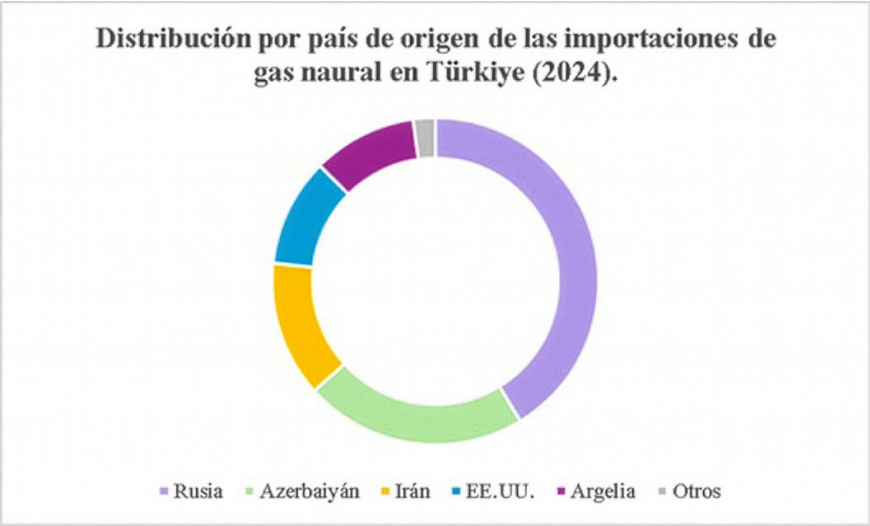


Figure 1. Geographical distribution of Türkiye’s natural gas imports, 2024.
Source: own compilation based on data from the Republic of Türkiye Energy Market Regulatory Authority (2024), Natural gas market 2024 sector report

According to the international database of the U.S. Energy Information Administration (EIA), Türkiye increased its primary production of *crude oil* and liquids at source by almost 50% between 2022 and 2024, far exceeding the growth rate observed in the period 2010–2019. This break in the trend suggests a strategic intensification of policies aimed at reducing external energy

dependence. However, total production of refined products remained relatively stable between 2021 and 2024, indicating that, despite progress in domestic extraction, the overall supply structure, as in the case of gas, continues to depend on significant imports of crude oil and derivatives (Republic of Türkiye Energy Market Regulatory Authority, 2024).

The supply of crude oil depends almost entirely on imports ($\approx 90\%$) and is facilitated through a combination of strategic pipelines and maritime transport, demonstrating logistical diversification (U.S. Energy Information Administration, 2025). Approximately 56% of imported crude oil comes from Russia, mainly by sea, whilst Iraq accounts for around 16%, via the Kirkuk-Yumurtalık (Kirkuk-Ceyhan) pipeline. Kazakhstan and Saudi Arabia supply around 10% and 5%, respectively (Republic of Türkiye Energy Market Regulatory Authority, 2024).

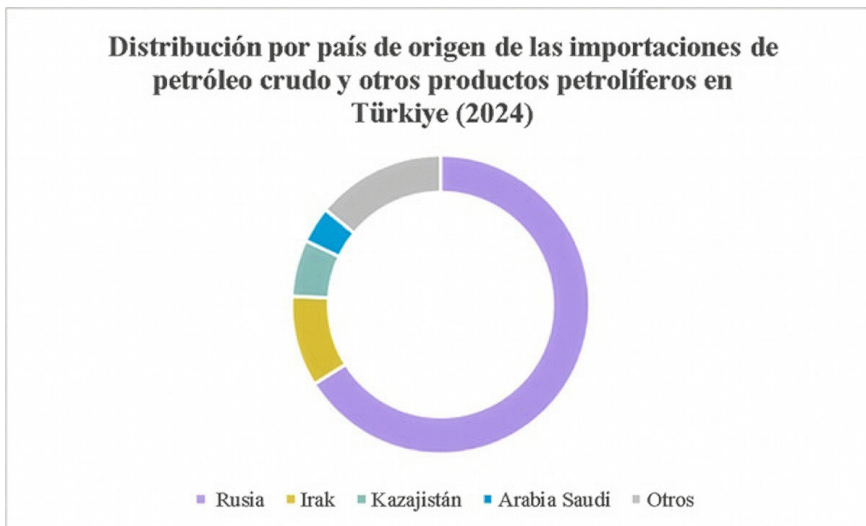


Figure 2. Geographical distribution of Türkiye's imports of crude oil and petroleum products, 2024. Source: Republic of Türkiye Energy Market Regulatory Authority (2024), Petroleum market annual report 2024

**The data refers to the total sum of crude oil, diesel types, fuel oil types, aviation fuels, marine fuels and other petroleum products.*

In addition to gas and oil, *coal* plays a central role in the Turkish energy system, particularly in electricity generation, where it accounted for approximately one-third of domestic production in the period 2022–2024, combining domestic lignite and imported coal (Ember, 2024; Maguire, 2024). Although Türkiye has its own

lignite reserves and possesses robust coal production capacities, around 60% of the coal used comes from abroad (International Energy Agency, 2024). Russia supplies the majority of imported coal, followed by Colombia and Australia, and to a lesser extent, the United States. In the context of the European Green Deal and the implementation of the Carbon Border Adjustment Mechanism (CBAM), the prominence of coal in Türkiye’s energy mix creates a structural friction with the European Union, as it threatens to make exports more expensive and reduce their competitiveness (European Commission, n. d.; Euracoal, 2022).

Beyond domestic supply, Türkiye has turned its energy transit infrastructure into one of its main sources of geoeconomic power. The gas and oil pipelines crossing its territory directly link producing regions with European markets, positioning Türkiye as an indispensable hub in the Eurasian energy architecture. In this regard, Asad Majeed Khan, Secretary-General of the Economic Cooperation Organisation (ECO), described Türkiye as the driving force behind regional development and the gateway to the Western world (Hürriyet Daily News, 2025).

Supplier country	Type of energy	Supply method	Geoeconomic relevance
Russia	Natural gas (~40%)	Gas pipelines (Blue Stream, TurkStream)	Largest single supplier; strategic interdependence
Azerbaijan	Natural gas (~20%)	TANAP (Southern Gas Corridor)	Pillar of diversification away from Russia; Caspian-Anatolia-EU link
Islamic Republic of Iran	Natural gas (~14%)	Tabriz-Ankara gas pipeline	Structural relationship conditioned by sanctions and geopolitical vulnerabilities
United States	LNG (~11%)	Spot contracts	Diversification and reduction of contractual rigidity
Algeria	LNG (~10%)	Long-term contracts	Mediterranean stability
Russia	Crude oil (~56%)	Maritime transport	Main source of imported crude oil; consolidation of its role as a regional refining hub

Supplier country	Type of energy	Supply method	Geoeconomic relevance
Iraq	Crude oil (16%)	Kirkuk-Ceyhan pipeline	Structural vector of energy, security and regional stability; Türkiye as a gateway to the Mediterranean.
Kazakhstan	Crude oil (≈10%)	Maritime transport	Diversification of supply
Saudi Arabia	Crude oil (5 %)	Long-distance maritime transport	Complementary supplier
Russia, Colombia, Australia, South Africa, USA	Coal	Long-distance maritime transport	Electricity security, but climate friction with the EU

Table 1. Summary of Türkiye’s energy imports by type, supplier country and method. *Source:* own compilation based on Republic of Türkiye Energy Market Regulatory Authority (2024); U.S. Energy Information Administration (2025); International Energy Agency (2024).

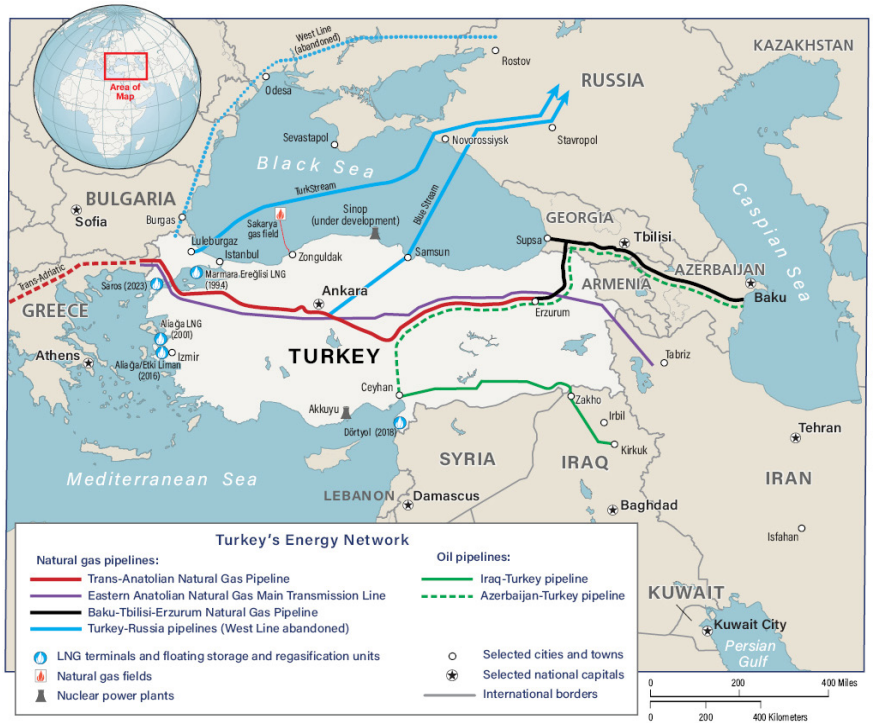


Figure 3. Türkiye’s energy network. *Source:* Siccardi, F. (2024). Available at: <https://carnegieendowment.org/research/2024/02/understanding-the-energy-drivers-of-Türkiyes-foreign-policy?lang=en>

Infrastructure	Type	Origin–Destination	Goeconomic value
SCP/BTE-TANAP-TAP	Gas	Azerbaijan–Türkiye–Europe	European diversification
TurkStream	Gas	Russia–Türkiye–the Balkans	Strategic interdependence
Tabriz–Ankara	Gas	Islamic Republic of Iran–Türkiye	Diversification of supply and regulatory body
Blue Stream	Gas	Russia–Türkiye	Security of supply
BTC	Oil	Azerbaijan–Georgia–Türkiye	Direct access to global markets
Kirkuk–Ceyhan	Oil	Iraq–Mediterranean	Regulatory actor and energy hub

Table 2. Main energy corridors crossing Türkiye. *Source:*Table compiled by the author based on data from the Turkish Ministry of Foreign Affairs (2025)

3.2 Logistical connectivity and Eurasian corridors

In the case of Türkiye, the energy strategy is complemented by a broader logistics ambition. As stated by the Ministry of Foreign Affairs of Türkiye, connectivity is conceived as a means of simultaneously sustaining commercial, economic, political and cultural relations between regions.

Corridor	Connects	Key infrastructure	Goeconomic function
Middle Corridor	China-Central Asia-South Caucasus-Türkiye-Europe	BTK Railway; ports of Baku/Alat, Aktau/Kuryk, Turkmenbashi; Turkish rail and port network	Alternative to Russian routes and the Suez Canal. Strategic central location
Development Road	Iraq-Türkiye-Europe	Motorway and railway (~1,200 km, under development)	Middle East-EU integration, Diversification of trade routes from the south
Ports (Mersin, İzmir, Ambarlı)	Industry–global markets	—	Reduction in logistics costs

Table 3. Main logistics corridors promoted by Türkiye. *Source:* own compilation based on the Ministry of Foreign Affairs of Türkiye, Türkiye’s Connectivity and Multilateral Transportation Policy.

The Middle Corridor (MC) is positioned as the most significant axis of Türkiye’s logistics connectivity strategy. Although its transit volume remains low compared to the northern corridors and

the maritime route, freight transport along this route increased by around two and a half times between 2022 and early 2023, against a backdrop marked by the war in Ukraine and the reconfiguration of Eurasian routes (Dušek, 2023, cited in Sánchez Tapia, 2024). This trend could become established in the medium term. According to the OECD (2023), the volume of freight transit along the MC is expected to triple by 2030, serving primarily as a regional corridor rather than an intercontinental one. However, the realisation of this scenario will depend on strengthened regional coordination, the harmonisation and digitalisation of customs procedures, and the reduction of regulatory bottlenecks.



Figure 4. The Middle Corridor among other corridors connecting Europe and Asia. Source: (Figure 1, World Bank, 2023)

4 Türkiye as a key player in Eurasian geoeconomics: an analysis by regional blocs

Building on the geopolitical framework developed in the previous chapter, which characterises Türkiye as a pivotal state in the Eurasian space (Castro, 2026), this chapter analyses how this centrality translates into specific economic and industrial dynamics. The focus is therefore not on territorial position or the projection of power in the classical sense, but on the management of critical flows (trade, energy, investment and connectivity) that shape the geoeconomic dimension of Türkiye's strategy and confer upon it a functional centrality within multiple overlapping

economic architectures. This position allows Ankara to influence Eurasian circuits without the need for full integration or exclusive alignments.

From this perspective, Turkish geoeconomics is structured around a strategy of functional diversification, aimed at reducing structural vulnerabilities, securing essential flows and preserving strategic room for manoeuvre. Türkiye does not project a homogeneous integration into Eurasia, but rather adapts its economic instruments in a differentiated manner to specific regional environments. Therefore, the aim of the analysis is to identify structural patterns of interdependence, tensions and complementarities that explain Türkiye's role as a central geoeconomic actor in Eurasia.

Based on this approach, the analysis is organised into four geographical blocks:

1. The Caucasus and Central Asia, as a platform for Eurasian connectivity.
2. An enlarged Europe, serving as an anchor for industry, regulation and demand.
3. The Middle East, as a functional hub for financial and energy trade
4. The Black Sea, as a critical area for transit and risk management.

4.1 Central Asia and the Caucasus

The Caucasus and Central Asia constitute one of the most strategic geoeconomic blocs for Türkiye within Eurasia, as they simultaneously concentrate energy, logistical and political-identity functions. This region acts as a structural axis of connectivity between the Caspian, Anatolia and Europe, reinforcing Türkiye's role as an indispensable transit hub.

From a geoeconomic perspective, the bloc fulfils three central functions:

1. Energy diversification, reducing dependence on dominant suppliers;
2. land and multimodal connectivity between Asia and Europe;
3. deepening of the Turkic space, which facilitates economic and political cooperation without the need for deep institutional integration.

Since the mid-2000s, and with greater intensity after 2020, the importance of this bloc has been reinforced by the reconfiguration of energy routes, the war in Ukraine and the growing interest in alternative corridors that avoid geopolitical bottlenecks (Asian Development Bank, 2022).

4.1.1 Institutional and regulatory architecture

Türkiye's geoeconomic influence in the Caucasus and Central Asia is underpinned by a hybrid institutional architecture, designed to maximise connectivity and economic cooperation without moving towards rigid integration schemes. In this region, Türkiye prioritises instruments that facilitate transit, energy and business establishment.

A central element is the Organisation of Turkic States (OTS), which acts as a platform for political and economic coordination within the Turkic space. Although its degree of institutionalisation is limited, the OTS plays a significant role as a framework that legitimises and facilitates initiatives in trade, transport, customs and economic cooperation, reducing political friction and promoting the gradual alignment of national and regional priorities. Recently, the OTS has promoted the creation of the Turkic Investment Fund, designed to finance projects that strengthen trade integration and attract intra-regional investment (Organisation of Turkic States, n. d.).

Furthermore, as a member of the OTS, Türkiye also participates in other regional initiatives such as TRACECA, a technical-operational intergovernmental framework focused on trade and transport in the Caucasus, Central Asia and the Black Sea; alongside logistics coordination mechanisms such as the Trans-Caspian International Transport Route (TITR), both of which form part of the Middle Corridor framework (Ministry of Foreign Affairs of the Republic of Türkiye, n. d.). Türkiye's involvement in multilateral trade agreements helps to reduce transaction costs, standardise and digitise procedures, and improve physical connectivity; this, in turn, contributes to its positioning as a trade and logistics hub in the region (OECD, 2023).

In parallel, Türkiye maintains a broad network of bilateral agreements, including BITs, with the main countries in the bloc. These instruments provide legal certainty for economic flows and allow the depth of the relationship to be adapted to the political realities of each partner, with a particular focus on Azerbaijan and

Uzbekistan, with whom it maintains preferential trade agreements (PTAs) (Ministry of Trade of the Republic of Türkiye, n. d.).

4.1.2 Foreign direct investment and business presence

Turkish investment and business presence in the South Caucasus and Central Asia constitute a significant instrument of economic outreach that complements Ankara's diplomatic efforts. Through the expansion of capital and companies in sectors such as construction, infrastructure, energy and logistics, Türkiye not only participates in Eurasian connectivity but also actively contributes to its realisation and operation.

According to the Eurasian Development Bank (EDB, 2026), Turkish capital in the region exceeds twelve billion USD and accounts for 15.5% of Asian investment, ranking behind China and the Gulf states. According to data from the International Monetary Fund (IMF, 2025), between 2017 and 2024 Turkish outward investment was concentrated mainly in Kazakhstan (USD 6.419 billion), Azerbaijan (USD 5.1 billion), Turkmenistan (USD 2.078 billion) and Georgia (USD 2.3 billion), whilst the volumes directed towards Uzbekistan and the smaller Central Asian economies were smaller. This distribution suggests a prioritisation of countries with greater energy or logistical significance within the Trans-Caspian region. Turkmenistan has been the recipient of a significant portion of Turkish capital in Central Asia, mainly directed towards energy and infrastructure projects (Kabar News Agency, 2026).

Within this pattern, Azerbaijan occupies a unique position. Between 1995 and 2021, Turkish FDI in Azerbaijan reached USD 13.3 billion, concentrated mainly in the energy sector, whilst Azerbaijani investment in Türkiye amounted to USD 20.3 billion, making Azerbaijan the leading investor from the Caucasus and Central Asia in the Turkish economy (Embassy of the Republic of Azerbaijan to Türkiye, 2025). This trend has intensified in recent years: cumulative data show that Azerbaijan has invested USD 55 billion in Türkiye (IMF, 2025), far exceeding other regional partners such as Georgia (USD 5 billion) or Kazakhstan (USD 738 million). For its part, the Turkish capital accumulated during this period in Azerbaijan, amounting to approximately USD 5.1 billion, is the largest in the Caucasus and Central Asia region, although considerably lower than that of Azerbaijan. The presence of thousands of companies in both countries and flagship projects such

as the STAR refinery in İzmir demonstrate a long-term investment foothold that distinguishes this relationship from Türkiye's other ties with the South Caucasus.

This centrality with Azerbaijan is fundamentally underpinned by three structural factors identified by Ordukhanyan *et al.* (2025): a political and military alliance strengthened after 2020, which has reduced perceived political risk; a deep energy interdependence centred on shared infrastructure such as the BTC oil pipeline and the TANAP gas pipeline; and Azerbaijan's role as the territorial anchor of the Middle Corridor in the Caucasus. Taken together, these elements consolidate Azerbaijan as the central economic and energy hub of the South Caucasus for Türkiye and as the main node of its Eurasian geoeconomic architecture.

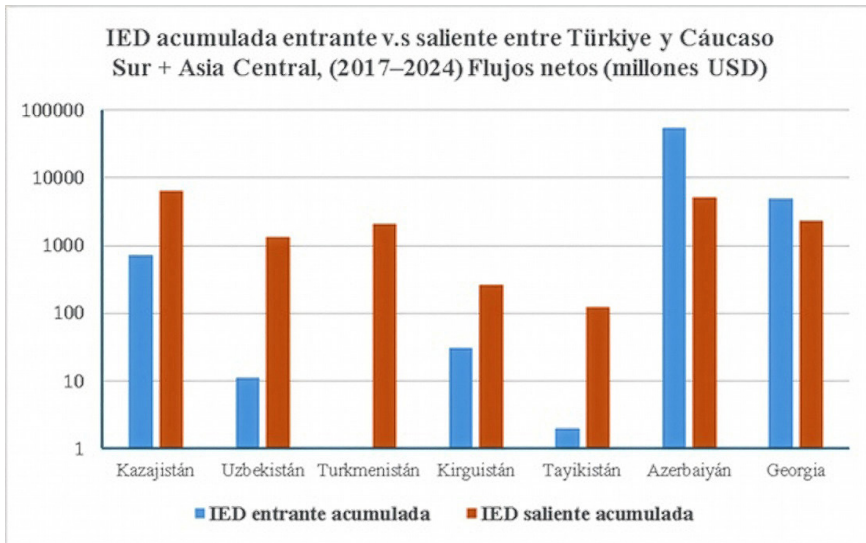


Figure 5. Comparison of Türkiye's inward and outward investment with the countries of the Caucasus and Central Asia between 2017 and 2024, in millions of USD. *Source:* own compilation based on IMF, Direct Investment Position Database 2025, net inward FDI, all instruments, all entities, 2017–2024. Amounts in millions of USD.

4.1.3 Trade and economic integration

Türkiye ranks among the top five trading partners of virtually all countries in both regions (with the exception of Armenia), being the leading supplier of imports to Georgia and Turkmenistan, and the second largest for Azerbaijan, which reinforces its structural importance in the regional economies (World Bank, 2023).

The trade relationship between Türkiye and *Azerbaijan* is structurally asymmetrical due to the weight of energy imports, although the aggregate trade balance has consistently been in Türkiye's favour between 2000 and 2023, as shown in Figure 6 (World Integrated Trade Solution [World Bank], 2025). Bilateral trade, which reached USD 6.13 billion (United Nations, 2024), follows this pattern: Türkiye mainly imports hydrocarbons, which accounted for around 88.3% of total imports from Azerbaijan in 2024, with a clear predominance of natural gas and other fuels ($\approx 82\%$ of the total) compared to crude oil ($\approx 7\%$); whilst it exports manufactured goods, machinery, consumer goods and industrial components, establishing itself as a key industrial and logistical partner for Baku. Thus, this asymmetry does not result in an overall deficit, but rather in sectoral dependence concentrated in the energy sector, whilst the total trade balance favours Ankara (World Integrated Trade Solution [World Bank], 2025).

For its part, Turkish investment in Georgia is active and comprises more than three hundred projects with a cumulative value of around USD 5.6 billion (Republic of Türkiye, Ministry of Trade, 2025). Bilateral trade stands at approximately USD 3.36 billion (United Nations, 2024) and shows a structural surplus in Ankara's favour. This pattern is confirmed in the 2000–2023 series, where Türkiye has maintained a sustained positive balance since the mid-2000s (WITS, 2025). The economic relationship follows a functional logic: Türkiye supplies capital goods, machinery, and industrial and construction materials, whilst imports from Georgia are limited and concentrated on products such as ferroalloys, reinforcing an asymmetrical but stable pattern.

Armenia, by contrast, appears as an economic relationship constrained by geopolitical factors, with limited direct trade that is largely channelled indirectly. Although trade flows were historically minimal, the data show a significant upturn in 2022 and 2023, exceeding USD 20 million annually in Turkish exports (WITS, 2025). Nevertheless, the latent potential for connectivity is not negligible, as a gradual normalisation of relations would open up additional transit options, reduce exclusive reliance on the Georgian corridor and expand Türkiye's logistical manoeuvring room in the South Caucasus.

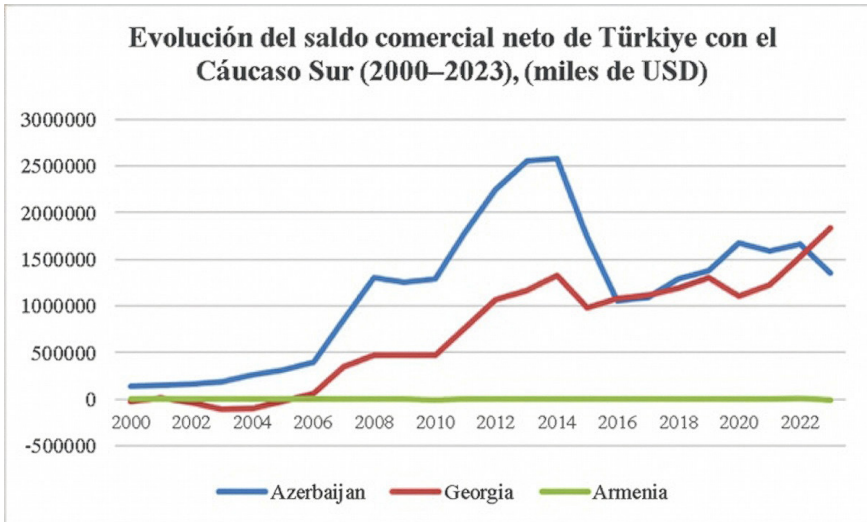


Figure 6. Comparative evolution of Türkiye's net trade balance with the South Caucasus (2000–2023). *Source:* Author's own compilation based on data from the World Bank, World Integrated Trade Solution (WITS), trade data by partner country (2000–2023)

Central Asia

In Central Asia, the pattern of economic integration is complementary and functional, with a clear division of roles. Türkiye exports manufactured goods, machinery, intermediate goods and services, particularly in construction and logistics; whilst it imports hydrocarbons, metals and raw materials.

Kazakhstan stands out for its economic scale and its key role in the Trans-Caspian corridor. For Türkiye, it represents both a resource partner and a critical hub on an alternative route; for Kazakhstan, Türkiye serves as a logistics and industrial platform for Mediterranean and European markets. Bilateral trade, which exceeded six billion USD in 2024, exhibits a structural imbalance in favour of Kazakhstan in terms of the trade balance, reflecting the weight of Turkish imports of Kazakh hydrocarbons and metals; meanwhile, Türkiye exports manufactured goods, machinery and intermediate goods (United Nations, 2024). This relationship reinforces the rationale behind the Middle Corridor and consolidates Ankara's position as a western gateway to Central Asia.

Uzbekistan has become a priority partner due to its market size and industrial complementarity, particularly in textiles and light manufacturing. Türkiye imports cotton and iron from Uzbekistan,

whilst exporting energy derivatives, industrial manufactured goods and agro-industrial products (United Nations, 2024). Recent economic liberalisation has generated a dynamic of growth in trade and the Turkish business presence, with bilateral trade standing at around USD 3.2–3.5 billion in 2023–2024 and a sustained surplus in Türkiye’s favour since the late 2010s, reinforcing the productive dimension and a progressively integrated textile value chain.

Trade with Turkmenistan reached two billion USD in 2024, showing a structural surplus for Türkiye for most of the period 2008–2022, albeit with a one-off reversal in 2023, characterised by an asymmetry in value added between Turkmenistan as a supplier of refined petroleum products and Türkiye as an industrial and technological supplier. Its potential for Türkiye lies in the diversification of supplies and the reinforcement of the energy hub narrative, still in its infancy in material terms, as illustrated by the preliminary gas supply agreement signed in 2025 between BOTAŞ and Türkmengaz (Anadolu Agency, 2025).

Finally, Kyrgyzstan and Tajikistan operate as smaller-scale markets and as an extension of Turkish commercial influence. Their strategic weight is limited, but they help to consolidate Türkiye’s regional presence and densify the economic network of the Turkic

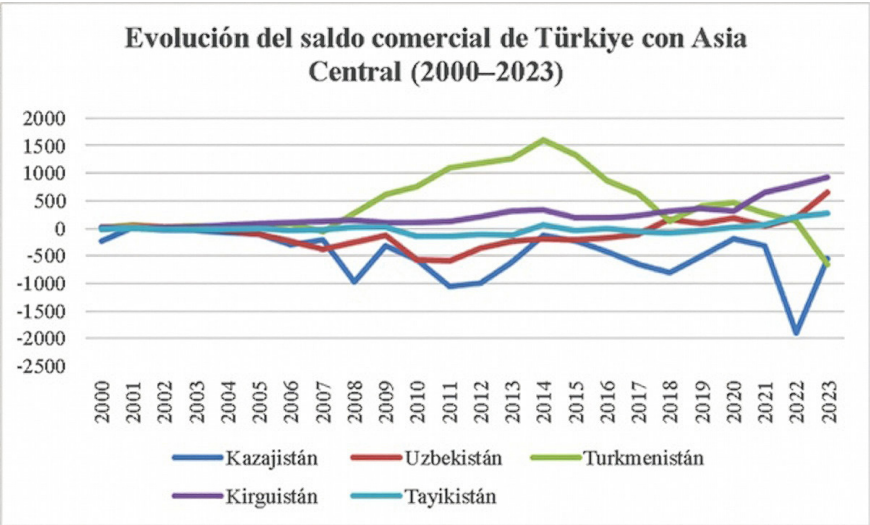


Figure 7. Comparative evolution of Türkiye’s net trade balance with Central Asia (2000–2023). *Source:* own compilation based on data from the World Bank, World Integrated Trade Solution (WITS), trade data by partner country (2000–2023)

space, with bilateral trade amounting to around 1.4–1.5 billion USD in the case of Kyrgyzstan and approximately 500–600 USD million in that of Tajikistan, based on a basic complementarity between Turkish manufactured goods and local raw materials.

Country	Investment	Bilateral trade	Geoeconomic role
Azerbaijan	Very high and bilateral (energy and strategic infrastructure)	High volume (~USD 6 billion). Turkish trade surplus with sectoral energy dependence	Central energy hub and anchor of the Middle Corridor
Georgia	High and two-way (infrastructure and logistics)	Medium-high (~USD 3–3.5 billion). Sustained surplus for Türkiye	Caspian–Anatolia logistics gateway
Armenia	Very low	Very low (<USD 50 million). Incipient and volatile trade	Alternative transit potential
Kazakhstan	High (industry, construction, logistics)	High (>USD 6 billion). Structural deficit for Türkiye	Trans-Caspian hub and resource partner
Uzbekistan	Medium–high and growing (textiles, manufacturing)	Medium (~USD 3–3.5 billion). Recent surplus for Türkiye	Emerging industrial market
Turkmenistan	High in energy and infrastructure	Medium (~USD 2 billion). Turkish surplus with recent volatility	Potential energy diversification
Kyrgyzstan	Low–medium	Medium-low (~USD 1.5 billion U). Strong Turkish surplus	Peripheral absorption market
Tajikistan	Low	Low (~USD 0.5 billion). Balance in Türkiye's favour	Peripheral trade extension

Table 4. Summary of Türkiye's investment and trade relations with the South Caucasus and Central Asia. *Source:* Compiled by the author using data from UN Comtrade (2024), supplemented with information from the World Bank (2023), the OECD (2023) and official trade and investment sources from Türkiye.

4.2 Enlarged Europe: European Union and the Balkans

Enlarged Europe constitutes the most structural and stabilising geoeconomic bloc for Türkiye within its Eurasian architecture. Unlike the Caucasus-Central Asia region, where transit and energy considerations prevail, this area serves as an anchor and

driver of industrial diversification, as well as a source of demand, for the Turkish economy.

From a functional perspective, the European Union and the Balkans operate in a complementary manner. The EU acts as a hub for productive integration, providing access to high-income markets, competitive discipline and integration into advanced industrial value chains. The Balkans, for their part, function as a space for regional economic projection, where Türkiye extends its industrial, commercial and financial footprint into smaller-scale economies of close geographical proximity.

Taken together, the enlarged Europe provides three key geoeconomic functions for Türkiye:

1. Stability of external demand, which is fundamental for an export-oriented economy.
2. Integration into industrial value chains, particularly in medium- and high-tech manufacturing.
3. A platform for regional expansion, enabling Türkiye to project economic capacity into South-Eastern Europe without bearing the regulatory costs of the EU core.

4.2.1 Institutional and regulatory architecture

The geoeconomic function of the enlarged Europe is underpinned by a dense and asymmetric institutional architecture, which combines formal frameworks with mechanisms for strict regulatory alignment.

The central pillar is the EU-Türkiye Customs Union (1995), which eliminates customs duties and quotas for industrial goods and processed agricultural products, and has been a decisive factor in Türkiye's integration into European value chains, as well as in the diversification and modernisation of its manufacturing portfolio (OECD, 2023; European Commission, n. d.). Although the agreement excludes services, agriculture and public procurement, it has led to extensive regulatory alignment in technical standards, industrial quality and business practices. Nevertheless, the EU and Türkiye aim to modernise the scope of the agreement, with the aim of maximising cooperation and joint resilience, given the global context of growing complexity and geopolitical and economic uncertainty, as well as ecological and digital challenges (Europa Press, 2026).

Although the accession process remains politically stalled, sectoral regulatory convergence and institutional cooperation mechanisms have reduced risk and reinforced Türkiye's role as a production and logistics hub for Europe. Added to this are new conditional variables, such as the CBAM, which directly impact the future competitiveness of Turkish industry and reinforce the regulatory nature of the relationship.

In parallel, Türkiye maintains a broad network of bilateral free trade agreements (FTAs) with most non-EU Balkan countries (Albania, Bosnia and Herzegovina, Serbia, Montenegro, North Macedonia and Kosovo), which minimise industrial tariffs and facilitate the entry of Turkish companies. Furthermore, investment treaties and economic cooperation mechanisms also underpin this economic relationship. These instruments offer greater flexibility than the EU framework and allow the depth of the relationship to be adapted to each specific context (Ministry of Trade of the Republic of Türkiye, n. d.). In this sense, the Balkans function as an extension of the European economic area, with lower regulatory costs and greater political manoeuvring room for Türkiye's economic outreach.

4.2.2 Foreign direct investment

FDI from Türkiye to the European Union

The European Union constitutes the structural anchor of the Turkish production model, both as the dominant source of capital and as a key destination for Turkish capital, creating an asymmetric interdependence that reinforces its industrial integration into the European economic area. This stabilising function has gained in importance since 2018, when domestic macroeconomic volatility and tensions with Western partners have increased the strategic value of maintaining a solid economic anchor, even in the absence of full political convergence.

According to OECD data, in terms of stock, the main investor countries in Türkiye are Germany (12.8%) and the Netherlands (12.2%), ahead of Russia (6.9%), the United States (6.0%), the United Kingdom (5.1%) and Qatar (4.9%). European investment is concentrated in manufacturing, the automotive sector, household appliances, machinery, banking, insurance, energy and advanced services (Lloyds Bank, n. d.). Although the net FDI balance between Türkiye and the EU results in a surplus

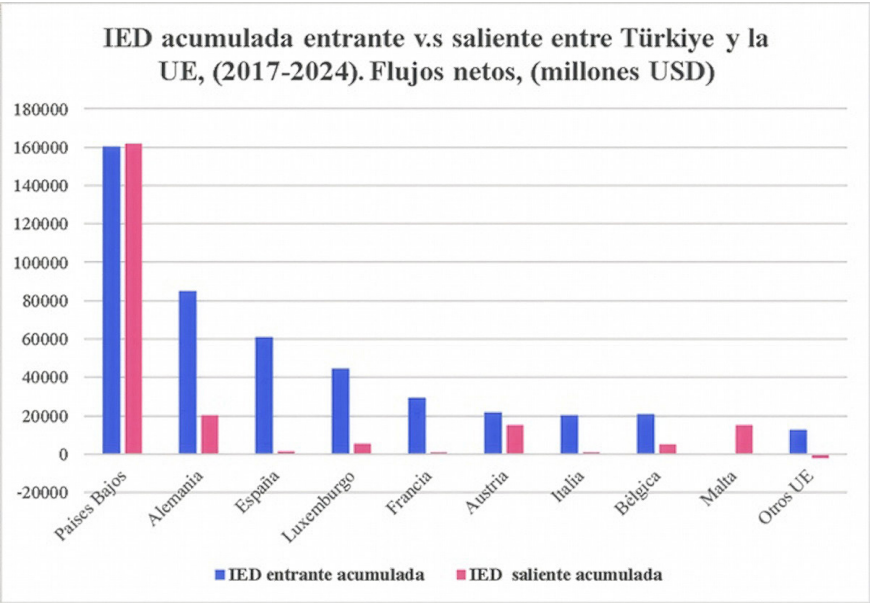


Figure 8. Investment interdependence between Türkiye and European Union countries (2017–2024): cumulative net FDI flows. Source: own compilation based on IMF, Direct Investment Position Database 2025, net inward FDI, all instruments, all entities, 2017–2024. Amounts in millions of USD

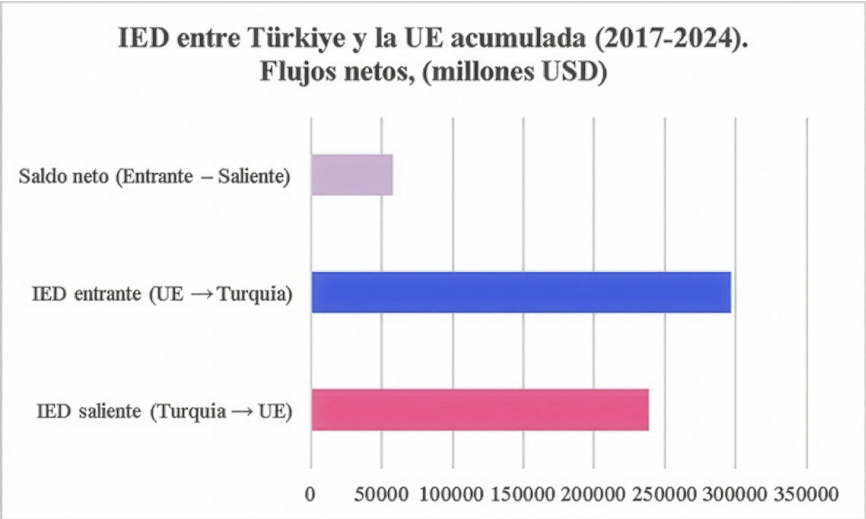


Figure 9. Investment interdependence between Türkiye and the European Union as a bloc (2017–2024): cumulative net FDI flows. Source: own compilation based on IMF, Direct Investment Position Database 2025, net inward FDI, all instruments, all entities, 2017–2024. Amounts in millions of USD

for the former, Turkish companies have been gaining relative investment prominence, even surpassing the Netherlands' contribution in cumulative investment between 2017 and 2024 (IMF, 2024).

Türkiye's FDI in the Balkans

In the Balkans, the situation is reversed: it is Turkish FDI that takes on greater significance. Türkiye has established a significant presence in banking, infrastructure, energy, construction, telecommunications and distribution – sectors with a high structural impact on small economies – with an approximate cumulative *stock* of direct investment of thirteen billion USD between 2017 and 2024. Albania is the Balkan country that attracts the most Turkish investment, accounting for around 42% (IMF, 2024).

Strengthening economic ties with the Balkans is an objective aligned with the narrative of promoting the 'Turkish-Balkan space', through which Türkiye's influence in the region is reinforced, whilst also expanding its operational base within the European space without the need for deep regulatory integration (Ministry of Foreign Affairs of the Republic of Türkiye, n. d.).

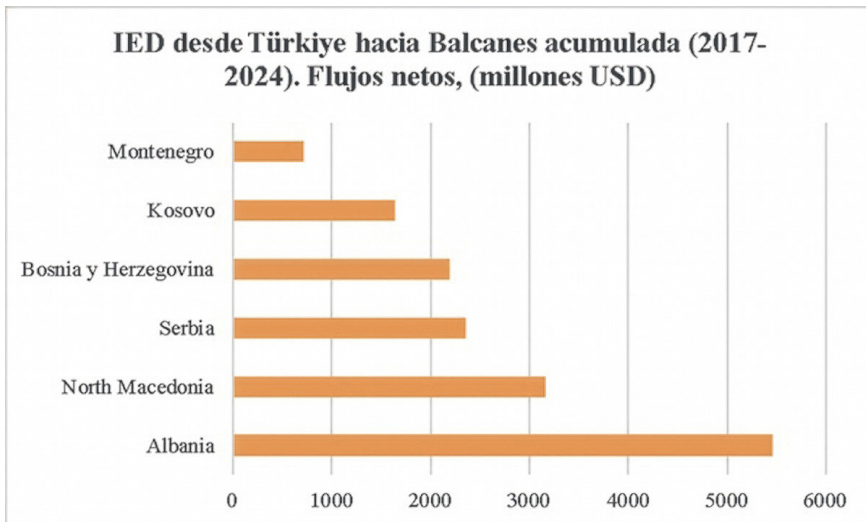


Figure 10. Distribution by country of outward investment from Türkiye to the Balkans (2017–2024), in millions of USD. *Source:* own compilation based on IMF, Direct Investment Position Database 2025, net inward FDI, all instruments, all entities, 2017–2024. Amounts in millions of USD

4.2.3 Trade and productive integration

Türkiye's trade in goods with the EU

The European Union is by far Türkiye's main trading partner. As noted at the start of this chapter, the EU consistently accounts for around 40–45% of Turkish exports, whilst also contributing approximately 25% of its imports. The trade balance shows a coverage ratio of close to 110%, indicating a relatively favourable export position for the EU. Within the framework of European foreign trade, Türkiye ranks fifth as an export partner and seventh as an import partner of the EU (OECD, 2023) (European Commission, 2025).

Bilateral trade in goods has more than quadrupled since 2002, growing relatively symmetrically in both directions, to exceed EUR 211 billion. For most of the period 2000–2016, Türkiye maintained a deficit with the EU, which peaked following the global financial crisis and the eurozone debt crisis (2011–2013), when the country stepped up its imports of European capital goods. From 2017–2018 onwards, however, the trade balance shifted significantly (European Commission, 2024).

From a sectoral perspective, EU–Türkiye trade remains predominantly industrial. Industrial exports consistently account for around 80–90% of bilateral trade, in both exports and imports, confirming Türkiye's role as a manufacturing hub integrated into European value chains. Although the relative weight of manufactured goods has fluctuated, with cyclical increases in metals and fuels, particularly since 2022, in 2024 manufactured goods still accounted for approximately 85% of Turkish exports to the EU, indicating that the underlying industrial pattern remains intact.

The composition of trade reveals structural complementarity: Türkiye exports automotive products, machinery, household appliances, technical textiles and chemicals (medium and medium-high complexity manufactured goods), whilst importing from the EU advanced machinery, electrical equipment and specialised chemicals—key inputs for its export base. This two-way pattern creates an asymmetric but stable productive interdependence, in which the EU acts as a technology supplier and Türkiye as an intermediate industrial link combining geographical proximity, competitive costs and regulatory convergence.

Within this framework, Germany occupies a central position, being the main destination for Turkish exports (8.25%) and the third-largest supplier of imports globally (7.93%), reflecting a high level of bilateral industrial integration (World Bank, 2023). Overall, the data confirm that, despite growing diversification towards other global partners, such as China or the BRICS, the EU—and particularly the German-Turkish axis—continues to act as the main structural anchor of Türkiye’s foreign economy, consolidating a relationship of deep and resilient interdependence. (World Bank, 2023; Aydın, 2025).

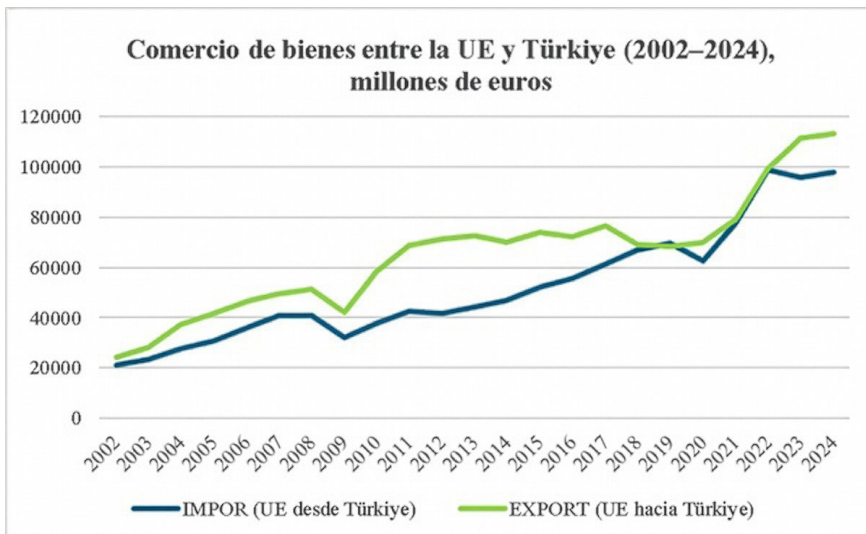


Figure 11. Evolution of trade in goods between the European Union and Türkiye (2002–2024), in millions of euros. *Source:* graph produced by the author based on data from Eurostat (2025), International trade in goods statistics

Türkiye’s trade in goods with the Balkans

Bilateral trade between Türkiye and the Balkans (Albania, Bosnia and Herzegovina, Montenegro, North Macedonia and Serbia) shows a pattern of increasing trade intensity since the early 2000s. As shown in Figure 12, from 2010 onwards the volume of trade accelerated, followed by a further surge in the period 2021–2024. In 2024, total trade reached approximately USD 3.86 billion with Serbia, USD 1 billion with Albania, USD 1.07 billion with Bosnia and Herzegovina, USD 0.91 billion with North

Macedonia and USD 0.21 billion with Montenegro (World Bank, 2025). Serbia has established itself as the leading regional partner in terms of volume, whilst Albania, Bosnia and Herzegovina, and North Macedonia show steady growth trajectories, albeit on a smaller scale.

In the Balkans, economic relations with Türkiye follow a different logic to those with the EU: trade exhibits clearly asymmetrical patterns, with a structural Turkish surplus, as it relies on smaller economies that are highly dependent on imports. In 2024, the trade balance was in Türkiye's favour in all cases, with a surplus of nearly USD 1.52 billion with Serbia, USD 0.86 billion with Albania, USD 0.54 billion with Bosnia and USD 0.52 billion with North Macedonia, whilst the surplus with Montenegro was less than USD 0.15 billion (World Bank, 2025). This favourable balance reflects a pattern of specialisation in which Türkiye acts as the dominant exporter of manufactured goods, consumer goods, chemicals and industrial materials, whilst importing mainly metals, primary products and, to a lesser extent, energy. The sectoral structure thus confirms a relationship that is less integrated in terms of production and closer to a model of regional manufacturing projection.

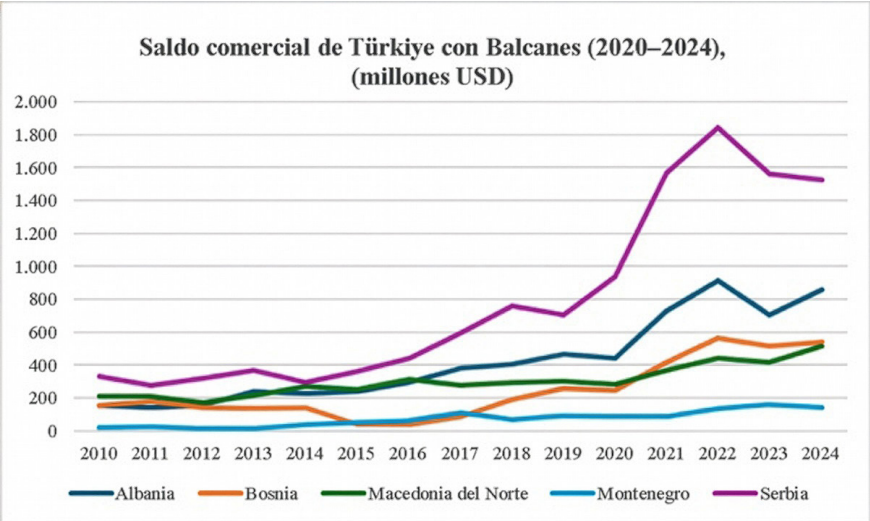


Figure 12. Evolution of the trade balance in goods between Türkiye and the Balkans (2010–2024), in millions of USD. Source: Author's own work based on UNCTADstat (United Nations Conference on Trade and Development), International Merchandise Trade Database

4.3 The Middle East

Türkiye's relationship with the Middle East is driven more by a functional strategy aimed at meeting specific economic and financial needs than by a logic of regional integration. From a geoeconomic perspective, the region plays an essentially compensatory role, acting as a space for managing structural macroeconomic vulnerabilities. Since 2018, and with greater intensity from 2020 onwards, this approach has been reinforced in response to the deterioration of domestic macroeconomic conditions.

Ankara is adapting its economic strategy in the region by assigning distinct roles to each sub-region:

1. The Gulf States (United Arab Emirates, Saudi Arabia, Kuwait, Oman, Bahrain and Qatar) play a central role as a source of external liquidity. Their importance is articulated through three main mechanisms: bilateral currency swaps, which bolster reserves and financial stability; direct investment in strategic sectors such as energy, infrastructure and financial services; and access to Gulf capital markets for corporate and sovereign financing.
2. Iraq and Syria constitute an area where Turkish economic activity is closely conditioned by security factors. Trade, investment and infrastructure projects depend to a large extent on border management, control of logistics corridors and territorial stability.
3. Israel, Lebanon and Jordan occupy a secondary position within Türkiye's strategy. These countries function primarily as destination markets for Turkish exports and as hubs for Mediterranean connectivity, without their economic weight being decisive.
4. In the case of the Islamic Republic of Iran, the economic relationship centres on the supply of natural gas and is heavily influenced by the international sanctions regime.

4.3.1 Institutional architecture and bilateral frameworks

In the Middle East, Türkiye has not promoted formal economic integration schemes comparable to those developed with the European Union or within the Turkic space. Its institutional approach is based on a pragmatic and flexible logic. This

preference stems from three factors: the high level of regional political volatility, which makes the construction of stable regulatory frameworks unfeasible; the heterogeneity of regimes and economic systems, which hinders regulatory harmonisation; and the strategic need to preserve tactical autonomy in the face of exclusive alliances that could limit Türkiye's room for manoeuvre in scenarios of geopolitical reconfiguration.

The most structured pillar of this architecture is formed by the states of the Gulf Cooperation Council (GCC). The Framework Agreement for Economic Cooperation laid the foundations for gradual trade liberalisation, which reached a turning point in 2024 with the start of negotiations for a Türkiye–GCC Free Trade Agreement (ADB, n. d.). This framework is reinforced by a consolidated network of Bilateral Investment Treaties (BITs) with Qatar (2001), the United Arab Emirates (2005), Kuwait (1989) and Saudi Arabia (2006), which provide legal protection for sovereign capital flows directed towards strategic sectors (UNCTAD, n. d.).

With Iraq, the institutional architecture is geared towards the management of strategic interdependencies. The Agreement on the Reciprocal Promotion and Protection of Investments, in force since 2014, is complemented by the Joint Economic and Commercial Committee (JETCO) as a bilateral coordination mechanism (Ministry of Foreign Affairs of the Republic of Türkiye, n. d.). Added to this is the Development Road project, which introduces a specific framework for transcontinental infrastructure (Reuters, 2024).

In the energy sector, the management of the Kirkuk-Ceyhan pipeline requires complex coordination between Baghdad, the Kurdistan Regional Government (KRG) and international companies, particularly following the International Chamber of Commerce arbitration ruling in favour of Iraq in 2023 regarding the KRG's crude oil exports through Turkish territory without the authorisation of the Iraqi federal government (Reuters, 2025). With regard to cooperation on water management, Baghdad and Ankara signed the 2024 Framework Agreement on Cooperation in Water Resources in 2025, a financing mechanism that channels Iraqi oil revenues into water infrastructure projects carried out by Turkish companies (Reuters, 2025).

Relations with Iran are characterised by minimal and highly conditional institutionalisation. They are based on basic economic

cooperation agreements and the Türkiye-Iran Joint Economic Commission, reflecting a logic of preserving essential strategic flows, in particular the supply of natural gas (Ministry of Foreign Affairs of the Republic of Türkiye, n. d.).

In the Levant, attempts to establish a multilateral economic institutional framework resulted in the creation of a High-Level Cooperation Council between Türkiye, Syria, Jordan and Lebanon, which became defunct following the outbreak of the Syrian conflict in 2011 (Ministry of Foreign Affairs of the Republic of Türkiye, n. d.). Since then, the regional architecture has evolved in a fragmented manner.

With Syria, institutionalisation is based on ad hoc sectoral agreements linked to reconstruction following the fall of the al-Assad regime. Notable examples include the 2025 Memorandum of Understanding on energy investments, as well as agreements for the rehabilitation of electricity infrastructure and the supply of natural gas via Türkiye (Özkizilcik and Kemal, 2025; Reuters, 2025).

Economic relations with Lebanon and Jordan are underpinned by association and free trade agreements (2010 and 2011), although their impact is limited due to the low level of trade and investment (Ministry of Trade of the Republic of Türkiye, n. d. a; n. d. b).

The institutional framework with Israel has entered a phase of marked deterioration following the outbreak of the Gaza conflict in October 2023. Despite the prior existence of free trade agreements and bilateral treaties, Türkiye formally suspended all direct trade with Israel from May 2024 (Siboni and Winner, 2026). Finally, the economic relationship with Palestine carries a political weight far greater than its actual economic significance. Although both countries have a Free Trade Agreement in force, trade volumes have no structural impact on the Turkish economy (Ministry of Trade of the Republic of Türkiye, n. d. c).

4.3.2 Foreign Direct Investment

Inbound FDI: macro-financial stabilisation

In the case of the Middle East, inward foreign direct investment into Türkiye does not stem from a logic of deep productive integration, but rather serves a function of macroeconomic

stabilisation and financial security. Unlike FDI from the European Union (anchored in industrial value chains), flows from the Gulf operate primarily as strategic sovereign capital, channelled through state funds or quasi-sovereign vehicles with the aim of bolstering reserves, sustaining financial confidence and acquiring stakes in strategic Turkish assets.

Between 2017 and 2024, net FDI inflows from the Middle East reached approximately USD 190 billion. As shown in Figure 13, over 93% of this investment came from Gulf Cooperation Council (GCC) countries, confirming the strong geographical concentration of regional capital (IMF, 2025). Qatar was the leading investor, accounting for 49.2% of the total, followed by Kuwait (19.7%) and the United Arab Emirates (19.5%).

The evolution of these flows over time (see Figure 14) reveals a close correlation with periods of domestic macroeconomic tension. Qatar recorded a significant peak in 2019–2020, coinciding with major strategic capital operations channelled through the Qatar Investment Authority (QIA), including the acquisition of a 10% stake in Borsa İstanbul AŞ (Türkiye Wealth Fund, 2020; Anadolu Agency, 2020). For its part, the United Arab Emirates has shown a trend of sustained growth since 2022, linked to diplomatic normalisation and the institutionalisation of joint investment mechanisms, such as the launch of the Türkiye Technology Fund–ADQ TWF in 2022 (ADQ, 2022; Türkiye Wealth Fund, 2022).

Beyond its volume, the defining feature of this FDI is its institutional nature. The involvement of sovereign wealth funds, QIA, ADQ, the Public Investment Fund (PIF), the Abu Dhabi Investment Authority (ADIA) and Mubadala indicates that this is strategic capital with a geoeconomic dimension, rather than conventional private investment focused solely on financial returns. This pattern is in line with the FDI Strategy 2024–2028, which explicitly prioritises attracting investment channelled through sovereign and quasi-sovereign institutions (Investment Office of Türkiye, 2024).

Furthermore, the timing of these flows is revealing. During the currency crises of 2018 and 2021–2022, when the lira depreciated by more than 40% annually and the central bank's net reserves fell into negative territory, capital from the Gulf acted as a systemic buffer, reducing pressure on the balance of payments and bolstering external credibility (Central Bank of the Republic of Türkiye, 2023; OECD, 2025). In this context, although currency swaps, such as the Türkiye-Qatar agreement initiated in 2018 for

a volume of up to fifteen billion USD, do not constitute FDI in the strict sense, they fulfil a complementary macro-financial function by bolstering liquidity and exchange rate stability.

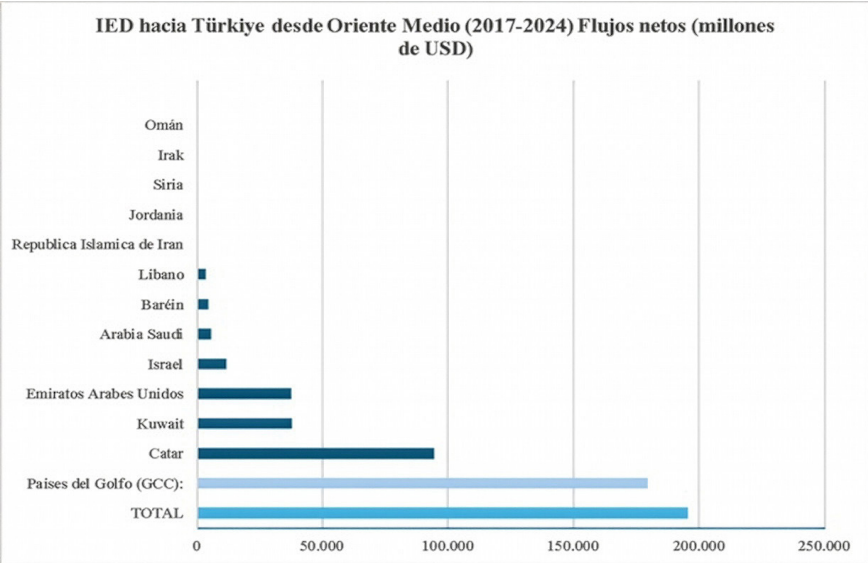


Figure 13. Distribution by country of inward foreign direct investment into Türkiye from the Middle East (2017–2024), in millions of USD. *Source:* own compilation based on IMF, Direct Investment Position Database 2025, net inward FDI. The OFFICIAL series (TUR.O.) has been used

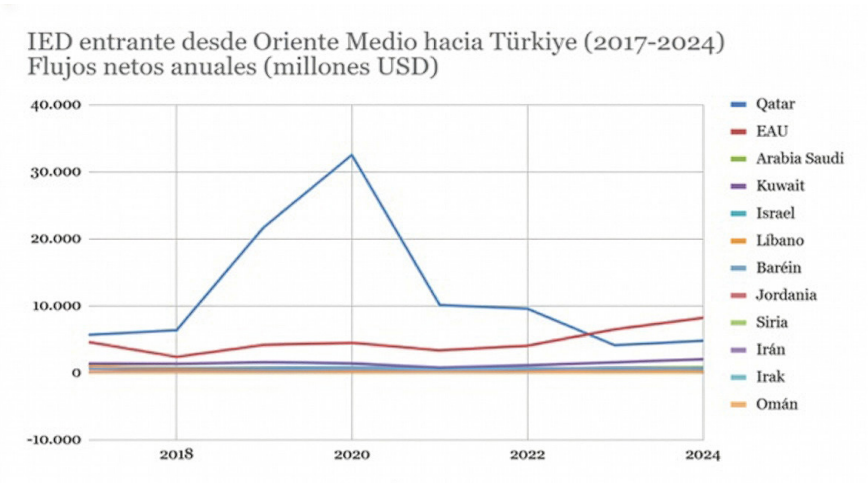


Figure 14. Trend in net inflows of foreign direct investment into Türkiye from the Middle East (2017–2024), in millions of USD. *Source:* Author’s own calculations based on data from the IMF, Direct Investment Position Database 2025, FDI (all instruments and entities). The OFFICIAL series (TUR.O.) has been used

In structural terms, Gulf FDI fulfils a compensatory role within the Turkish geoeconomic model. It does not replace the European productive anchor nor does it generate deep industrial integration, but it reduces the financial vulnerability stemming from energy dependence and domestic macroeconomic volatility. Thus, Gulf sovereign investment fits coherently into Türkiye's strategy for managing critical flows, reinforcing its room for manoeuvre in an environment of high external exposure

Outward FDI: structural projection

Unlike inward FDI, which is primarily geared towards macroeconomic stabilisation and financial reinforcement, outward direct investment from Türkiye to the Middle East follows a logic of structural projection and the consolidation of economic spheres of influence. In this case, Turkish capital acts as an instrument of strategic positioning in economies undergoing transformation, post-conflict reconstruction zones or markets linked to state-led megaprojects, where international competition is limited and local institutional capacity is fragile.

Between 2017 and 2024, Türkiye invested approximately USD 30.674 billion in the region. The geographical distribution of these flows reveals a strong strategic selectivity: Saudi Arabia accounted for 29.3% of the total, followed by Bahrain (24.7%) and Iraq (14.3%) (International Monetary Fund, 2025). The evolution of these flows over time, shown in Figure 15, reveals a close correlation between investment dynamics and regional geopolitical cycles.

The case of Saudi Arabia clearly illustrates this interdependence between diplomacy and capital. Between 2017 and 2023, flows recorded negative values, reaching a low in 2022 against the backdrop of the diplomatic crisis stemming from the Khashoggi case. The normalisation that began in 2021 and President Erdoğan's official visit in April 2022 marked a turning point. In 2024, the first significant positive flow in several years was recorded, suggesting that political reconciliation facilitated the return of Turkish companies to megaprojects linked to Saudi Arabia's Vision 2030 (IMF, 2025).

In contrast, the Islamic Republic of Iran shows sustained structural deterioration. Between 2017 and 2024, Turkish investment flows to Iran fell by approximately 67%, against a backdrop shaped by the reimposition of international sanctions since

2018. After peaking at USD 575 million in 2020, investment fell sharply in 2021 and stood at around USD 130 million in 2024 (IMF, 2025).

Bahrain shows the opposite trend. Turkish investment increased by 514% over the period analysed, consolidating its position as the second-largest regional recipient. This pattern is largely due to its role as a regional financial hub, which facilitates the structuring of Turkish investments in the Gulf thanks to a favourable regulatory environment for holding companies and investment vehicles (IMF, 2025). In this sense, Bahrain operates not only as an end market but also as an intermediate financial platform.

In the cases of Syria and Iraq, investment takes on an additional structural dimension linked to reconstruction and critical infrastructure. In Syria, IMF data show virtually zero flows between 2017 and 2024 due to the civil war and international sanctions. However, the fall of the al-Assad regime in December 2024 marks a turning point. In May 2025, a USD 7 billion energy agreement was signed, led by a Turkish-Qatari consortium (Kalyon, Cengiz, UCC Holding) with US participation, for the development of natural gas and solar power plants (Alkousaa, 2025). The same consortium was awarded the contract for the expansion of Damascus International Airport. Furthermore, energy integration includes the Kilis-Aleppo gas pipeline (operational since August 2025), which supplies Azerbaijani gas via Türkiye with Qatari funding, as well as the Reyhanli-Harim power line (operational by the end of 2025) (Özkizilcik and Kemal, 2025).

In Iraq, the Turkish presence shows greater structural continuity. The country is the third-largest global market for Turkish construction firms. In 2024, Turkish companies were awarded thirteen projects in infrastructure, energy and transport (Engineering News-Record, 2024). The Development Road project represents the central axis of this expansion: Türkiye committed approximately USD 19.9 billion to infrastructure aimed at connecting the port of Al-Faw in Basra with the Turkish border and, from there, with Europe via Mersin (Reuters, 2024). In this case, the investment seeks not only an economic return but also the consolidation of a strategic logistics corridor that reinforces Türkiye's central role in Eurasia.

Overall, outward FDI to the Middle East does not constitute a homogeneous regional integration strategy, but rather a

selective policy of structural positioning. Through participation in energy, logistics and urban megaprojects, Turkish capital establishes a tangible presence in areas undergoing economic transformation, sets technical standards compatible with its industrial base, and generates long-term, recurring trade flows. Thus, whilst inward FDI from the Gulf helps to stabilise Türkiye’s macro-financial architecture, outward investment in the Middle East consolidates economic spheres of influence that reinforce Ankara’s geoeconomic projection in its immediate neighbourhood.

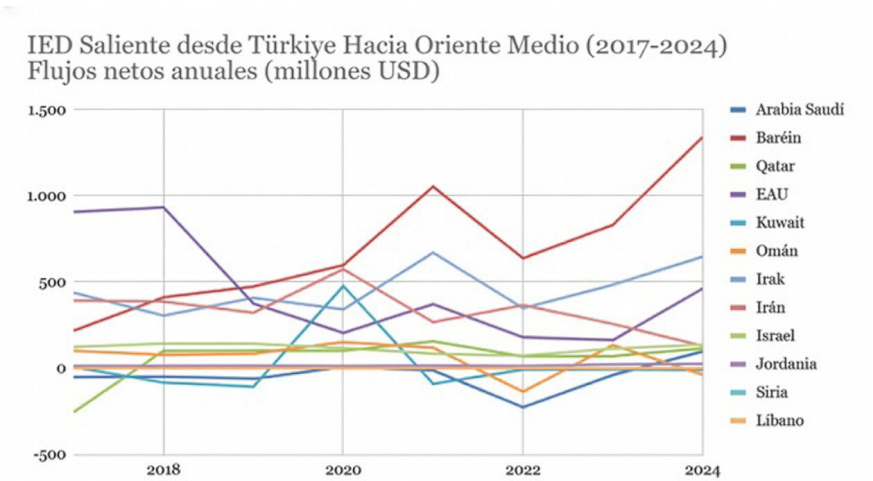


Figure 15. Evolution of net Turkish investment flows to the Middle East (2017–2024), in millions of USD. *Source:* Author’s own compilation using data from the IMF Direct Investment Position Database (2025). The official series (TUR.O.) is used for direct bilateral relations, and the counterparty series (TUR.SCC.) for Bahrain

4.3.3 Bilateral trade

Trade constitutes the most stable and widespread aspect of Türkiye’s relationship with the Middle East, although patterns of interdependence vary significantly by sub-region.

The Gulf Cooperation Council countries account for the largest share of Türkiye’s trade volume in the region. As shown in Table 5, the dominant pattern is: Türkiye exports manufactured goods, machinery, construction products, food and consumer goods, whilst importing energy, metals and strategic intermediate products (OECD, 2023; UN Comtrade, 2023).

The United Arab Emirates has established itself as the main regional trading partner. In 2023, it ranked among the top five global destinations for Turkish exports, accounting for around 5% of total exports (Statista, 2023). Bilateral trade volume reached approximately USD 20.1 billion, with a surplus in Türkiye's favour (UN Comtrade, 2023).

However, the structure of bilateral trade presents a significant peculiarity: gold dominates flows in both directions (OEC, 2023). This characteristic introduces volatility and distorts the conventional reading of the trade balance. From a geoeconomic perspective, gold fulfils strategic functions for Türkiye: a hedge against inflation and currency depreciation, a mechanism for reserve diversification, and a tool for managing international liquidity. Furthermore, the UAE acts as a re-export platform to Africa and Asia through its free zones, indirectly expanding Türkiye's trade reach (Anadolu Agency, 2023).

With Qatar, trade reflects a structural complementarity reinforced by financial links. Doha supplies aluminium, energy products and petrochemicals, whilst Türkiye exports industrial goods, machinery and consumer products (OEC, 2023). Although the total volume (~USD 1.3 billion) is lower than that of the UAE or Saudi Arabia, the strategic nature of the relationship outweighs its quantitative dimension, partly due to its integration with financial mechanisms such as the bilateral swap (Central Bank of the Republic of Türkiye, 2023).

Saudi Arabia's trade relationship has been shaped by diplomatic dynamics. Following the political deterioration after 2018, bilateral trade contracted significantly, particularly in Turkish exports of textiles and machinery. However, the normalisation that began in 2021 allowed for a gradual revival of trade, which reached approximately USD 5.7 billion in 2023 (UN Comtrade, 2023). The pattern remains asymmetrical: Türkiye exports manufactured goods and machinery, whilst importing petrochemical products (OEC, 2023).

Overall, the Gulf functions as a compensatory market for Turkish industry. Although it does not generate deep productive integration, it absorbs manufacturing surpluses and provides critical inputs, diversifying European dependence without replacing it.

Country	Total volume (thousand million USD)	Balance	Main trading partner
UAE	~20.1	Favourable to TR	Gold (↑76%) / Gold (↓74%)
Saudi Arabia	~5.7	TR deficit	Textiles, machinery / Petrochemicals (↓70%)
Qatar	~1.3	TR surplus	Food, furniture / Aluminium (↓67%)
Kuwait	~0.7	TR surplus	Machinery, construction / Oil
Oman	~1.4	TR surplus	Machinery, construction / Energy
Bahrain	~0.6	TR surplus	Textiles, food / Oil, chemicals

Table 5. Türkiye’s bilateral trade with Gulf countries: volume, balance and main trade items (2023). *Source:* own compilation based on data from the Observatory of Economic Complexity (OEC, 2023) for the main trade and data from UN Comtrade (2023) obtained via World Bank WITS for volumes.

In its immediate neighbourhood, Türkiye treats Syria and Iraq as hybrid spaces where security, trade and connectivity are structurally intertwined. The underlying logic is to securitise in order to trade, and to trade in order to stabilise.

Iraq is one of the main non-European export destinations. In 2023, it ranked among Türkiye’s top five export markets (≈5% of the total) (Statista, 2023). As shown in Table 6, sales are concentrated in food, agri-industry, household appliances, light machinery and construction materials: consumer goods and reconstruction materials with a high social impact in an economy heavily dependent on imports (OEC, 2023). Conversely, Turkish imports from Iraq are dominated almost exclusively by crude oil (≈85–90% of the total). The political dimension of this energy trade relationship is articulated through the simultaneous management of Baghdad and the KRG. Ankara uses trade and logistics corridors as tools for stabilisation and as a mechanism to influence customs and energy flows (Altunışık and Göçer, 2025). The Development Road project extends this logic by anchoring the relationship in long-term shared infrastructure. For Türkiye, it consolidates its role as a Eurasian logistics hub; for Iraq, it offers a path to economic diversification and regional integration (Reuters, 2024).

In the case of Syria, bilateral trade has, since 2011, been reduced to a mere functional supply system, concentrated mainly in the north-west of the country. Turkish exports are dominated by food, energy, pharmaceuticals and construction materials, reflecting an extreme dependence of Syrian territories under Turkish influence on supplies from Türkiye (OEC, 2023). Syrian exports to Türkiye are marginal, constituting a centre-periphery relationship.

For Türkiye, the Levant constitutes an area of limited trade interdependence, characterised, as shown in Table 6, by small to medium-sized markets.

In the case of Israel, the relationship has been based on significant sectoral interdependence in intermediate and industrial goods, albeit politically contingent. The formal suspension of trade announced by Ankara in May 2024, in the context of the Gaza conflict, highlighted that the economic link operated more as an instrument of political leverage than as a structural strategic dependency. However, the subsequent partial reconfiguration of flows via third countries suggests the persistence of selective economic pragmatism (Siboni and Winner, 2026).

Although Israel possesses significant offshore natural gas reserves, energy cooperation with Türkiye has remained limited due to diplomatic fragility and regional tensions. Furthermore, Israel has promoted alternative energy export frameworks that exclude Türkiye as a transit hub, as illustrated by its participation in the EastMed project (Esen, 2025).

Lebanon and Jordan maintain stable but asymmetrical trade relations: both depend on Türkiye as a supplier of consumer goods, construction materials and services, whilst their exports to the Turkish market are limited and concentrated in specific sectors.

The Islamic Republic of Iran constitutes a specific case, characterised by structural energy interdependence conditioned by the regime of international sanctions. As noted in the section on energy, the core of the link is natural gas, supplied via the Tabriz-Ankara pipeline. Beyond its quantitative significance, this flow acquires geoeconomic relevance due to its nature, which makes it difficult to replace in the short term, especially in a context of regional and global energy volatility.

Country	Total volume (thousand million USD)	Balance	Main trading partner
Iraq	~14.3	TR surplus	Food (↑25%), construction / Oil (↓90%)
Israel	~7.1	Balance	Steel, textiles / Fertilisers, chemicals
Iran	~5.4	TR deficit	Food, textiles / Natural gas, chemicals
Syria	~2.5–3	TR surplus	Food, pharmaceuticals / Cotton (low volume)
Lebanon	~2.4	TR surplus	Food, consumer goods / Marginal volumes
Jordan	~0.9	TR surplus	Food, textiles / Phosphates, chemicals

Table 6. Structure and balance of Türkiye’s trade in goods with its immediate eastern neighbours (Iraq, the Levant and the Islamic Republic of Iran) (2023). *Source:* own compilation based on data from the Observatory of Economic Complexity (OEC, 2023) for the main trade flows and UN Comtrade (2023) data obtained via World Bank WITS for volumes

In structural terms, the role of the Middle East for Türkiye presents a central geoeconomic paradox: whilst Ankara aspires to establish itself as a Eurasian energy hub through control of transit infrastructure, it simultaneously maintains a critical dependence

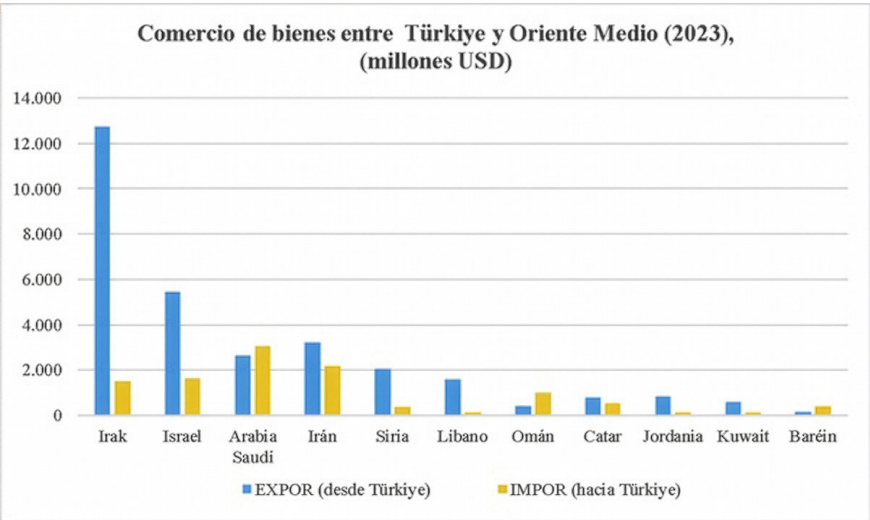


Figure 16. Breakdown by country of trade in goods between Türkiye and the Middle East (2023) in millions of USD. *Source:* own compilation based on UN Comtrade (2023) data, obtained via the World Bank’s World Integrated Trade Solution (WITS)

on energy supplies from the region itself. This asymmetry limits Türkiye's bargaining power in the regional energy sphere and constrains its scope for strategic autonomy in the face of supply disruptions. Unlike its productive ties with Europe or its logistical integration with the Caucasus and Central Asia, Türkiye's economic relationship with the Middle East is structurally susceptible to short-term political dynamics

4.4 Black Sea

From a geoeconomic perspective, the significance of the Black Sea region for Türkiye lies not in the existence of deep economic integration among the littoral states, but in its role as a critical transit corridor. Essential flows of trade, energy and food supplies pass through this corridor, meaning that any disruption immediately results in tangible economic impacts.

From a functional perspective, the Black Sea fulfils three key functions for Türkiye: (i) a critical trade and energy transit corridor, connecting Black Sea markets with the Mediterranean and Europe, particularly for the supply of gas, oil and derivatives; (ii) an essential hub for food security, given the concentration of grain exports from Russia and Ukraine; and (iii) a geoeconomic buffer zone, where Ankara manages asymmetric interdependencies with actors of high systemic importance (Russia, the EU, NATO) to contain external disruptions before they translate into internal macroeconomic tensions.

The war in Ukraine since 2022 has not created these functions, but it has intensified and brought them to the fore, transforming the Black Sea into a central vector for the transmission of global volatility. In this context, logistical, energy and trade decisions taken in the region have immediate effects on prices, inflation and the balance of payments, both in Türkiye and in its immediate surroundings. Against this backdrop, Türkiye's strategy is geared less towards maximising direct economic returns and more towards preserving the continuity of essential flows.

4.4.1 Institutional and regulatory framework

The institutional architecture of the Black Sea is characterised by fragmentation, low formal economic density and strong security constraints. The Black Sea lacks a robust regional framework that provides a stable framework for economic cooperation.

The main regional forum is the Black Sea Economic Cooperation Organisation (BSEC), established in 1992 and initially promoted by Türkiye. Although its operational capacity is limited and its direct economic impact modest, the BSEC plays a significant role as a platform for multilateral economic dialogue and minimal institutional coordination among the littoral states and regional partners (Ministry of Foreign Affairs of the Republic of Türkiye, n. d. a). Complementarily, the Black Sea Trade and Development Bank (BSTDB) acts as the financial arm of regional cooperation (Black Sea Trade and Development Bank, n. d.). However, its scale is insufficient to bring about structural transformation of the bloc's economy.

As a central pillar of Black Sea governance, the Montreux Convention (1936) regulates the transit of vessels through the Istanbul Strait and the Dardanelles, granting Türkiye the capacity to regulate maritime access, limit the risks of escalation and preserve the security of trade routes. Since the start of the war in Ukraine in 2022, Ankara has strictly enforced the Convention, closing the straits to military vessels from belligerent states and preventing further militarisation of the Black Sea. This approach has helped to contain the risk of direct escalation between Russia and NATO, whilst simultaneously preserving the continuity of commercial and energy traffic, and reinforcing Türkiye's role as a manager of systemic maritime risk with direct implications for trade, energy and regional logistics (Ministry of Foreign Affairs of the Republic of Türkiye, n. d. b).

In addition, initiatives such as BLACKSEAFOR, TRACECA and Operation Black Sea Harmony (2004) foster cooperation in maritime security, surveillance and transregional connectivity, thereby indirectly contributing to the stabilisation of trade and logistics flows (Ministry of Foreign Affairs of the Republic of Türkiye, n. d. c)

Beyond these mechanisms, governance of the Black Sea is primarily structured through functional bilateral relations. In this regard, the relationship with Russia occupies a central position and is structured around long-term energy agreements, infrastructure projects such as TurkStream, and specific operational arrangements that enable trade flows to be maintained in a context of sanctions. Relations with Ukraine, Bulgaria and Romania present distinct profiles. With Ukraine, pre-war agreements continue to provide a minimal basis for the preservation of essential economic ties and eventual future reconstruction. With Bulgaria

and Romania, both Member States of the European Union, economic interaction is embedded within the EU regulatory framework

4.4.2 Foreign direct investment

FDI in the Black Sea region exhibits an asymmetrical pattern: inward flows to Türkiye are marginal, concentrated in Russian energy megaprojects, whilst Turkish outward flows are directed mainly towards Romania and Bulgaria.

Inward FDI into Türkiye from the Black Sea

Between 2022 and 2024, Türkiye received between ten and fourteen billion US USD annually in total FDI (U.S. Department of State, 2024a, 2025; Investment Office of the Presidency of the Republic of Türkiye, 2025). The Black Sea region contributed between two hundred and two hundred and eighty million USD annually in net flows, barely 1.4–2.8% of the total. This marginal share demonstrates that the Black Sea is not a significant source of inward capital, except in the specific case of Russia.

In terms of cumulative *stock*, Russia accounts for approximately 7% of the total *stock* of FDI in Türkiye, ranking among the top ten foreign investors (Lloyd's Bank Trade, n. d.; OECD, n. d. b). During 2017–2024, net inflows from Russia reached USD 52.28 billion, accounting for 99.7% of the regional total. Bulgaria, Romania and Ukraine together contributed just USD 162 million; these limited flows lack any significant sectoral concentration (IMF, 2025).

This concentration reflects a quantitative and qualitative asymmetry. Russian investment is channelled almost exclusively through two strategic megaprojects: the Akkuyu nuclear power plant and the TurkStream gas pipeline, both linked to Türkiye's energy security and Russia's geopolitical projection in the eastern Mediterranean (Akkuyu Nükleer A.Ş., n. d.; TurkStream, n. d.).

With Bulgaria and Romania, EU Member States, economic interaction takes place within the EU regulatory framework, providing regulatory predictability. However, investment flows remain limited, acting primarily as regulatory bridges between the volatile Black Sea environment and the European economic area, rather than as significant channels for capital transfer.

Figure 15 illustrates the evolution of Russian FDI flows to Türkiye between 2017 and 2024. The peak in 2018 (+103.3%) reflects

disbursements into strategic projects such as Akkuyu and TurkStream. Following this peak, flows normalised between 2019 and 2021 during the implementation phase of both megaprojects. The period following the invasion of Ukraine is particularly illustrative. In 2022, despite Western sanctions, flows remained stable (-22.2%). In 2023, the largest year-on-year increase (+121.1%) in the series occurred, eighteen months after the start of the conflict. This increase reflects the relocation of Russian capital to non-sanctioning jurisdictions and the acceleration of the Akkuyu project ahead of its planned commissioning in 2025. The correction of (-14.7%) does not reverse this trend, with flows remaining above pre-conflict levels.

This dynamic consolidates an asymmetric strategic interdependence: Russia depends on Türkiye as an energy corridor and a non-sanctioned market, whilst Türkiye continues to depend on Russian gas and associated capital as a macroeconomic buffer against its structural energy vulnerability.

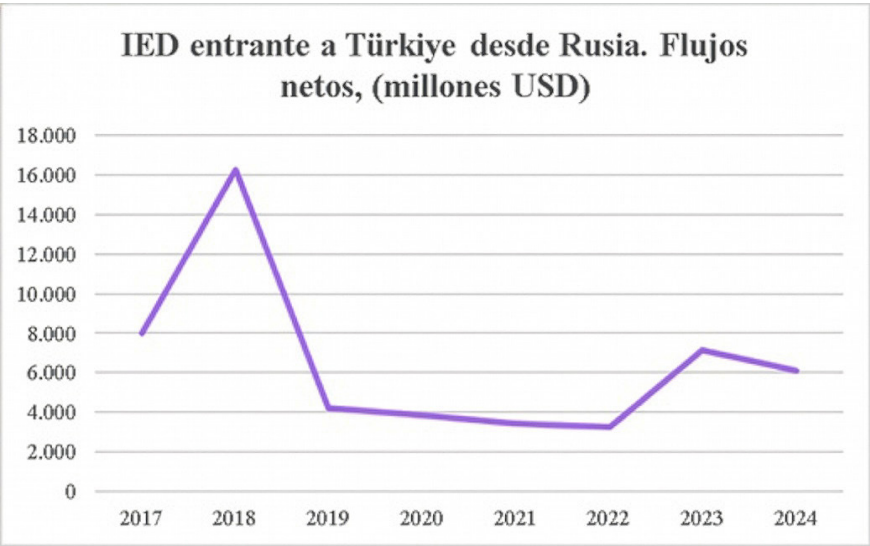


Figure 17. Trend in inward foreign direct investment into Türkiye from Russia (2017–2024) in millions of USD. *Source:* own elaboration based on IMF data, Direct Investment Position (DIP) 2025

Inward FDI into Türkiye from the Black Sea

Romania is the main destination for Turkish investment in the bloc, with a *stock* exceeding USD 7.5 billion by the end of 2023, concentrated in manufacturing, banking, energy, construction

and wholesale trade (OECD, n. d. c; Investment Office of the Presidency of the Republic of Türkiye, 2024). This investment remains stable thanks to the EU regulatory framework, geographical proximity and the size of the market.

Bulgaria ranks second, with recent annual inflows of USD 1.2–1.5 billion and a stock of USD 3–4 billion (OECD, n. d. c; IMF, 2025), linked to light industry, logistics, construction, energy and financial services. Its EU membership provides regulatory predictability that facilitates cross-border investment.

Russia and Ukraine show highly volatile or non-existent flows. In Russia, Western sanctions since 2014, which were intensified after 2022, have disrupted official reporting of Turkish FDI since 2021 (IMF, 2025). In Ukraine, the Russian invasion led to an almost total halt in new investment, limiting Türkiye's presence to pre-conflict projects and defence exports (UNCTAD, 2024).

4.4.3 Bilateral trade

Bilateral trade in the Black Sea region is highly exposed to geopolitical and logistical shocks. As previously mentioned, for Türkiye, this region is a critical functional space where the priority is to ensure continuity of supply, price stability and control of essential flows.

In aggregate terms, Türkiye's trade with the main Black Sea countries is clearly concentrated on Russia and Ukraine, with Bulgaria and Romania as secondary but more stable partners. The trade pattern is dominated by energy, cereals, agri-food products and raw materials, which generates structural deficits for Türkiye.

The relationship with Russia constitutes the central axis of Black Sea trade. Both before and after 2022, bilateral trade volume has remained at high levels, with a balance that is clearly unfavourable to Türkiye, as can be seen in Figure 16 (UN Comtrade, 2023). In 2023, Russia ranked among Türkiye's main trading partners for imports, accounting for approximately 9% of total imports, alongside China and Germany (Statista, 2025). As can be seen in Table 7, Turkish imports are dominated by natural gas, oil, coal and cereals, whilst exports are concentrated in manufactured goods, machinery, consumer goods and agro-industrial products.

With Ukraine, prior to the outbreak of the war, bilateral trade stood at approximately seven billion USD according to UN Comtrade data (Table 7), with a structure centred on cereals, vegetable oils, metals and intermediate products on the Ukrainian side, and manufactured goods, machinery and consumer goods on the Turkish side. The conflict has reduced volumes and disrupted routes, but has not eliminated interdependence, particularly in the agri-food sector. Türkiye has sought to preserve these flows due to their direct impact on domestic prices, inflation and food security, accepting greater logistical complexity and higher transport costs.

In this context, the Black Sea Grain Initiative represented a turning point. The agreement, brokered by Türkiye together with the United Nations, allowed for the temporary resumption of Ukrainian grain exports via the Black Sea, mitigating disruptions in global markets and stabilising prices (UNCTAD, 2023). From the Turkish perspective, the agreement served a dual purpose: on the one hand, to ensure critical food flows; on the other, to convert its control over transit and its diplomatic capacity into geoeconomic capital, reinforcing its role as a stabilising actor in a highly volatile environment. The subsequent suspension of the agreement necessitated a reconfiguration of routes, increasing the use of alternative land and river corridors, with higher costs and lower efficiency, which further highlighted the role of the Black Sea as the optimal route.

Added to this commercial interdependence is a specific dimension of high strategic value: trade in the field of defence and aerospace industrial cooperation. Even before 2022, Türkiye had established itself as a key supplier of defence systems to Ukraine, particularly through the export of Bayraktar TB2 unmanned aerial vehicles, as well as through technological cooperation agreements on aircraft engines and naval platforms. Although quantitatively this trade represents a small fraction of total bilateral trade, this relationship serves a dual purpose. On the one hand, it strengthens the Turkish defence industry as a high value-added export sector, expanding markets beyond the traditional Euro-Atlantic axis. On the other, it grants Ankara political and strategic capital in its management of the conflict, by allowing it to maintain operational channels with Kyiv without severing its functional relationship with Moscow (Dost, 2024).

Trade with Bulgaria and Romania presents a more stable and predictable profile, integrated within the regulatory framework of the

European Union. Volumes are significantly lower than with Russia, but significant in terms of regional connectivity. Türkiye mainly exports manufactured goods, consumer goods and intermediate products, whilst importing machinery, chemicals and industrial goods. These exchanges reinforce the Black Sea–South-Eastern Europe axis and act as a partial buffer against the volatility on the bloc’s eastern flank.

In this regard, the reconfiguration of trade routes after 2022 has increased the importance of Turkish Black Sea ports as critical nodes within the regional logistics system. The war has transformed the Black Sea into a high-tension zone, which has heightened the strategic value of the port infrastructure of the non-belligerent littoral states (Nate *et al.*, 2024). In this context, facilities such as Samsun, Trabzon, Zonguldak, Karadeniz Ereğli and İnebolu have gained prominence as entry and exit points for cereals, energy products and general cargo. Beyond their logistical function, these ports enable Türkiye to absorb disruptions, redirect trade flows and reduce pressure on the straits and the ports of the Marmara Sea, thereby reinforcing its role as a stabilising and connecting actor in the Black Sea region (Nate *et al.*, 2024).

Country	Total volume (thousand M USD)	Balance	Main trading partner
Russia	~56.5	Structural trade deficit	Food, machinery / Gas (↓60%+), oil
Ukraine	~7.1	TR surplus	Machinery, vehicles / Cereals, oils
Romania	~10.6	Balance	Food, textiles / Steel, industrial goods
Bulgaria	~6.6	TR surplus	Food, textiles / Fertilisers, chemicals

Table 7. Structure and balance of Türkiye’s trade in goods with the Black Sea region (2023). *Source:* Compiled by the authors using data from the Observatory of Economic Complexity (OEC, 2023) for the main trade flows and data from UN Comtrade (2023) obtained via the World Bank WITS for trade volumes

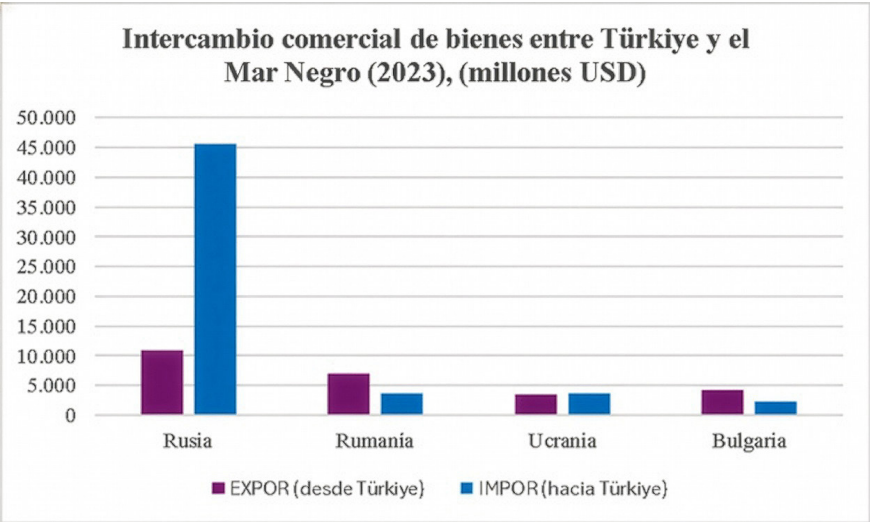


Figure 18. Distribution by country of trade in goods between Türkiye and the Black Sea region (2023) in millions of USD. *Source:* own compilation based on UN Comtrade (2023) data obtained via World Bank WITS

Conclusions

The analysis presented in this chapter shows that Türkiye’s economic projection in Eurasia does not follow a logic of hegemonic expansion, but rather an adaptive geoeconomic strategy aimed at managing structural vulnerabilities. The evolution of the Turkish economic model, from macroeconomic stabilisation in the early 2000s to the current phase of functional diversification, demonstrates a growing instrumentalisation of trade, energy, investment and connectivity flows as foreign policy tools.

Industrialisation emerges as the central pillar of this strategy, not in terms of self-sufficiency, but as a basis for selective integration into regional and global value chains, particularly within the European and Eurasian spheres. This productive base enables Türkiye to act as an intermediate manufacturing hub, combining cost competitiveness, geographical proximity and partial regulatory alignment, whilst diversifying markets and reducing concentration risks.

Energy dependence constitutes the main structural vulnerability of the Turkish economy, but also the axis around which one of its main geoeconomic levers is articulated. Through control of transit infrastructure and a deliberate diversification of suppliers

and routes, Türkiye has strengthened its role as an energy transit hub, reinforcing its relevance to Europe, the Caucasus and the Middle East, without completely eliminating its external exposure.

Analysis by regional bloc reveals that Türkiye's geoeconomy is not homogeneous but functionally differentiated. Whilst the European Union acts as an anchor for industry, regulation and demand; the Caucasus and Central Asia fulfil a key role in connectivity and energy diversification; and the Middle East operates as a space for financial clearing and securing external liquidity. This differentiation maximises Türkiye's strategic room for manoeuvre, avoiding rigid integration schemes and allowing for flexible adaptation to diverse regional environments.

Taken together, Türkiye emerges as a functional pivot state in Eurasia, whose centrality derives not from territorial control or the imposition of norms, but from its capacity to manage and channel critical flows. Its geoeconomic strategy must therefore be interpreted as a policy of resilience under constraint, aimed at sustaining economic stability and relative autonomy in an international environment marked by fragmentation, competition between blocs and the growing securitisation of the economy.

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Chapter Seven

Türkiye between the West and the BRICS+: strategic autonomy in a multipolar world

Marien Durán Cenit

Abstract

In recent decades, Türkiye's foreign policy has often been described as a succession of opportunistic shifts between the West and other contexts. However, this chapter argues that Turkish behaviour is best understood by considering two long-standing 'imaginaries'. The first, linked to the founding of the Republic, conceives of Türkiye as part of the Western world in political and normative terms, without renouncing its uniqueness; an idea that already appears in Halide Edib's *Türkiye Faces the West*. The second, formulated from the 2000s onwards by Ahmet Davutoğlu, presents Türkiye as a 'central power' thanks to its geography and history, capable of projecting itself across various regions and diversifying its alliances. Focusing on the period since 2018, this study observes the consolidation of a hybrid diplomacy: Türkiye maintains its Euro-Atlantic anchorage for security and economic reasons, but reinforces its strategic autonomy. With the EU, accession remains on hold despite interdependence; with NATO, it remains a key ally, albeit a more assertive and transactional one. At the same time, Ankara is moving closer to the BRICS+ not as a breakaway, but as

a means of diversification to gain room for manoeuvre in an increasingly multipolar order.

Keywords

Türkiye, NATO, European Union, BRICS+, Strategic autonomy.

Introduction

In recent decades, Türkiye's relations with the West—and, more recently, with the BRICS and other non-Western poles—have frequently been interpreted as the result of circumstantial shifts or opportunities that have influenced foreign policy. From this perspective, Ankara appears as an essentially pragmatic, even opportunistic, actor, oscillating between Atlanticism and openness towards other scenarios depending on short-term incentives. However, this interpretation is incomplete, given that its foreign policy is a combination of identity and interests (Yavuz, 2022). To understand it better, one must consider the different strategic frameworks that have marked two major phases of Turkish foreign policy and which help to explain the current position: the project of Westernisation and Europeanisation associated with the founding of the Republic in the 1920s, and the more recent project of civilisational autonomy within an increasingly post-Western international order, in an international system where Western primacy is eroding and multiple poles of power are emerging.

From a contemporary perspective, both phases can be interpreted as the result of two major intellectual and strategic projects. The first dates back to the founding period of the Republic and finds an early expression in Halide Edib's work *Türkiye Faces the West*, which articulates a conception of Türkiye as an integral part of the Western political, cultural and normative sphere, whilst retaining its historical and civilisational distinctiveness, which must not be diluted. The second, developed from the 2000s onwards and set out in *Strategic Depth* and other articles by Ahmet Davutoğlu, proposes an alternative interpretation of Türkiye's position in the international system, based on its geographical centrality (rather than as a country on the periphery), its historical heritage and its capacity to project itself simultaneously towards multiple regions (Davutoğlu, 2007: 79). Far from being mutually exclusive, these can be considered complementary interpretative frameworks that continue to shape the Turkish strategic debate today.

From a geopolitical perspective, Türkiye is a pivotal country par excellence (Brzezinski, 1997). Its unique geographical position—situated at the crossroads of Europe and Asia and simultaneously projecting itself towards the Middle East—has conferred structural advantages in the sphere of its foreign relations. This triple spatial affiliation is directly reflected in the configuration of its

contemporary foreign policy. A historic ally of the West, Ankara has in recent years intensified its rapprochement with the emerging powers of the so-called Global South, in line with its growing aspirations for a foreign policy of multidimensional projection and its 'rhythmic diplomacy' (Davutoğlu, 2007: 82). Far from reflecting an ideological break, this orientation stems from an adaptive strategic realism, aimed at maximising its room for manoeuvre in an increasingly multipolar international environment in which Türkiye seeks to maintain complementary relations with the EU, the US/NATO, Russia and Eurasia, whilst preserving its status within the Western framework and seeking opportunities in other contexts. In this sense, Türkiye has demonstrated a remarkable capacity for strategic adjustment, establishing itself as a unique case that aspires to consolidate itself simultaneously as a regional power and as a middle power with global reach (Toygür *et al.*, 2022: 6).

In essence, under the AKP government led by Recep Tayyip Erdoğan, Turkish foreign policy has evolved from the 'zero problems with neighbours' doctrine—a slogan coined to emphasise good neighbourliness—(Davutoğlu, 2007: 80) towards a more assertive, security-oriented, multifaceted and autonomous approach (Yavuz, 2022). This strategy can be characterised as multi-vectorial, flexibly aligned or based on strategic balance: Türkiye aims not to depend exclusively on a single bloc of alliances, maintaining simultaneous ties with different poles of power in order to maximise its national interests.

This logic of diversification forms the starting point for the present analysis of Türkiye's position in its relationship with the West and its simultaneous rapprochement with leading countries outside the Western axis, within the context of the current post-Western world order (Alaranta and Hadi, 2025: 4). In short, in recent years Türkiye has been shaping a hybrid diplomacy that combines a Euro-Atlantic anchorage with growing strategic autonomy (Kutlay and Öniş, 2021; Rodríguez-López and Lois, 2022: 12; Aydın-Düzgit *et al.*, 2025), fuelled also by the accumulated strain in its relations with the European Union. Ankara maintains its ties with the West for strategic and economic reasons, but complements this with an unprecedented openness towards other international spheres. Türkiye thus navigates between a West and an EU that it perceives as imposing civilisational barriers, and the BRICS, where it does not identify such limitations (Süsler, 2025: 182).

On this basis, the chapter is organised into three sections, with the analysis beginning in 2018. Firstly, a straightforward interpretative framework is provided to help understand the main changes in Türkiye's foreign policy and its positioning between the West and the BRICS+. Next, its relationship with the European Union and NATO is analysed through a qualitative review of official documents and verified sources. To this end, reports from the Ministry of Foreign Affairs of the Republic of Türkiye, the European Commission—particularly the progress reports—the European Parliament and the Atlantic Alliance itself are used, supplemented by academic literature and specialist press. This approach allows for an understanding of both the institutional dimension and the political and strategic evolution of these relations. Subsequently, the chapter addresses Ankara's openness towards the BRICS+ sphere, examining official reports and statements since 2020. This section focuses on how Türkiye is exploring new avenues for cooperation and international projection beyond the traditional Western axis. Finally, the conclusions argue that Türkiye, whilst maintaining its traditional relations with the West, is strengthening its strategic autonomy.

The period analysed, spanning from 2018 to the present, is no coincidence. That year marks a turning point in Turkish foreign policy, as significant internal transformations coincided with major changes in the international environment. Although other factors could be highlighted, the chapter focuses on three key areas. Firstly, the stalemate in negotiations with the European Union from 2018 onwards, against a backdrop marked by the transition to a presidential system and its political consequences. Secondly, the evolution of the relationship with NATO, which from that point onwards has been characterised by a complex balance between the status of an indispensable ally and an increasingly autonomous foreign policy agenda. Finally, 2018 is also the year in which Türkiye openly expressed its interest in the BRICS+, seeking new sources of support and opportunities to strengthen its status and influence within the international system.

1 A brief interpretative framework for Turkish foreign policy between the West and the post-Western order

Türkiye's relations with the West and, more recently, with the BRICS+, can be understood as part of a process of identity reconfiguration and long-term interests, visible through these

two intellectual milestones separated by seven decades. In Edib's work, which emerged during the Republic's founding decade, Türkiye projects itself towards the West as a civilisational horizon and a normative benchmark of modernity—necessary from a material standpoint if the country is to survive. This drive towards Westernisation, promoted by Mustafa Kemal and the Kemalist elite, laid the foundations for a lasting anchorage in the Western world that would later crystallise with integration into Euro-Atlantic and European structures (İlgaz and Toygür, 2011).

Seven decades later, in *Strategic Depth*, Davutoğlu sets out a vision in which the country ceases to be conceived as a periphery of Europe and instead presents itself as a 'central power', endowed with multiple regional axes and greater strategic autonomy. This interpretation, frequently associated with a neo-Ottomanist approach (although Davutoğlu claimed he was not an Ottomanist) and a civilisational assertiveness, invokes Türkiye's historical, cultural and geographical depth as the basis for a more active geopolitical role (Ministry of Foreign Affairs of the Republic of Türkiye, 2012), particularly in the Middle East, but also *vis-à-vis* the West (Toygür *et al.*, 2022: 9). In this sense, Davutoğlu's proposal provided ideological coherence to a foreign policy aimed at greater regional and international prominence and a reduction in exclusive dependence on the Western axis.

In essence, the central thesis is that Edib and Davutoğlu, a woman and a man as representatives of two essential conceptual frameworks, embody two distinct eras and strategic frameworks regarding Türkiye's place in the world. Edib represents the era of reformist Westernisation following the imperial-republican trauma and the overcoming of the Ottoman legacy, but with the question of how to modernise by filtering out what is necessary without falling into superficial imitations. This logic established a pattern of engagement with the West which, since the 1950s, has remained in force and is still reflected in Türkiye's role within Euro-Atlantic security. Davutoğlu expresses the revaluation of the imperial past and the aspiration for a civilisational autonomy within an increasingly post-Western international order. For Edib, the West appears as a structural condition of the system: it must be understood and tools adopted so as not to be left out. For Davutoğlu, the West is just one vector among others: Türkiye can cooperate with the West, but also diversify (Eurasia, the Islamic world, Africa), and use its position to maximise its room for manoeuvre. In essence, both frameworks help us understand

Türkiye's relations with the Western world to which it aspired for decades and its current openness towards other centres of power, including the BRICS+.

This logic translates into a strategy of balancing between major powers: Türkiye seeks to maintain the benefits derived from its Western alliances—such as NATO's security guarantees or access to the European market—whilst deepening its ties with non-Western actors and emerging blocs such as the BRICS+ (Aydın-Düzgüt, 2024; Süssler, 2025). This approach, commonly described as a multi-vector foreign policy or one of 'strategic balance' (Toygür *et al.*, 2022), provides Ankara with greater flexibility and decision-making capacity, enabling it to present itself as an actor with a voice of its own in regional and global affairs. Türkiye is not merely a bridge, operating on the fringes of various international orders to maximise strategic autonomy, but an actor that has elevated its status on the global stage (Kutlay and Öniş, 2021: 1092). This is also reflected in the 'Century of Türkiye', the grand political-strategic narrative launched by President Recep Tayyip Erdoğan to coincide with the centenary of the Republic in 2023 (Kanat and Duran, 2024).

Within this framework, the concept of Turkish strategic autonomy reflects an eminently pragmatic calculation. Without breaking with the West, Türkiye aspires to preserve the freedom of action necessary to defend its national interests, even when this entails occasionally diverging from dominant Western positions, as European institutions frequently criticise it for doing. Although the current emphasis differs from the Kemalist period, certain continuities persist: both Atatürk's Türkiye and Erdoğan's share the objective of strengthening the country's international position and maximising its independence, albeit in structurally different contexts. Even during the Cold War, Ankara sought to preserve margins of autonomy in adverse circumstances (Rodríguez-López and Lois, 2022); today, this pursuit has become an explicit state doctrine, underpinned by a geopolitical narrative that combines elements of modernity and tradition.

Since 2020, in an increasingly multipolar global environment marked by the shift of economic power towards Asia, Türkiye has continued to recalibrate its alliances. In Ankara's view, the relative decline of the West reinforces the desirability of diversifying strategic partners (Toygür *et al.*, 2022: 14). The Turkish Foreign Ministry itself acknowledges that the international system is undergoing 'a period of growing uncertainty, in which rivalries

between powers are resurfacing and universal values and mechanisms of global governance are being eroded' (Ministry of Foreign Affairs of the Republic of Türkiye, n. d.). Against this backdrop, Türkiye considers it essential to maintain an active and pragmatic foreign policy, 'both on the ground and at the negotiating table', underpinned by agile and flexible diplomacy (Ministry of Foreign Affairs of the Republic of Türkiye, n. d.). The result is a calculated strategic ambiguity that introduces a certain degree of uncertainty regarding its alignments, without amounting to a structural break with the West.

This approach is also reflected in political discourse. President Erdoğan has popularised the slogan 'the world is bigger than five' (Ministry of Foreign Affairs of the Republic of Türkiye, 2023), calling for reforms that give a greater role to middle and emerging powers (Ministry of Foreign Affairs of Türkiye). These demands largely coincide with the positions held by the BRICS+ and other countries of the Global South, particularly regarding the reform of international governance. However, this convergence in rhetoric has not led to an abandonment of the Western anchor, which remains a structural pillar of Turkish foreign policy.

In short, the rise of the BRICS+ group, the shift of economic power towards Asia and the crisis of legitimacy facing the US-led liberal order have intensified the debate over the possible emergence of a post-Western order. In this scenario, Türkiye appears as a formal ally of the West and, at the same time, an active partner of Russia, China and other non-Western actors. This duality, far from being contradictory, constitutes the defining feature of its current international profile, operating deliberately from the margins of various international orders to maximise its strategy.

2 Türkiye and the West: between the EU and NATO

From its founding years, Türkiye has harboured a constant aspiration to be recognised as part of the Western community of nations (Lewis, 1961). This rapprochement has been a complex and ambivalent process, marked by Türkiye's strong desire to integrate into the Western world, but also by tensions over identity and recognition. Türkiye conceived of its incorporation into Europe not only in geographical terms, but as a political and cultural symbol of modernisation and Westernisation. Edib noted that Türkiye faced the challenge of reconciling its Ottoman legacy with the demands of a modern, secular and liberal Europe

(Edib, 1930). This relationship has involved a yearning for European acceptance that has frequently clashed with prejudices and doubts about its 'European-ness', generating mixed feelings ranging from frustrated hope to resignation.

This pro-Western orientation, following the Second World War, was driven by security considerations *vis-à-vis* the Soviet Union, resulting in Türkiye's integration into the Western alliance (Kutlay and Öniş, 2021: 1096). The political elite's initial aspirations took shape in Türkiye's active role as a founding member of the United Nations (1945) and the Council of Europe (1949). It joined NATO in 1952, the OECD (1961) and the OSCE (1973), as well as entering into an association with the then European Economic Community following the 1963 Ankara Agreement. Türkiye formally applied for membership of the EEC in 1987 and was officially recognised as a candidate country at the 1999 Helsinki European Council (İlgaz and Toygür, 2011). As stated in Türkiye's national foreign policy for the 21st century: Türkiye 'is a member and even a founding member of almost all European institutions, including the Council of Europe and the Organisation for Security and Cooperation in Europe. Full membership of the European Union remains one of the strategic priorities' (Ministry of Foreign Affairs of the Republic of Türkiye, n. d. b). In essence, since the MID-20TH CENTURY, the country has become intertwined with Western security and economic structures and currently aspires to engage on an equal footing and as an autonomous power (Sánchez Tapia, 2024: 65).

Despite tensions and a relationship marked by advances and setbacks, Türkiye continues to define itself officially as an integral part of Europe and the transatlantic community. From this perspective, this paper explores, on the one hand, the evolution of relations between Türkiye and the European Union, characterised by the stagnation of the accession process since 2018 and by the critical assessments contained in recent reports by the European Commission. On the other hand, this paper examines Türkiye's role within NATO, an alliance in which it remains a key player from a strategic and military standpoint, although its participation has not been without friction and occasional disagreements in recent years.

2.1 Relations with the European Union: accession on hold

Between 1998 and 2007, Türkiye adopted more than eight packages of constitutional and legal reforms, driving a broad process

of political transformation that was perceived in both Brussels and Ankara as a genuine convergence towards European standards (Müftüler-Baç, 2025: 1187). Indeed, the 2004 progress report acknowledged that Türkiye had made a notable legislative effort, and accession negotiations were formally opened in 2005. This phase, known as the 'golden age', coincided with the height of Euro-optimism in Türkiye, with levels of public support for accession exceeding 75% of the population.

However, the expectations generated during this period began to fade from 2006 onwards, when the accession process entered a phase of progressive deadlock. The main factor was the Cyprus issue, which led to the freezing of several chapters and the stagnation of the process. Added to this was the deterioration of the political climate in the EU, marked by enlargement fatigue and the identity-based reservations of some Member States, which, according to Soler i Lecha, progressively drained the accession framework of strategic credibility (Soler i Lecha, 2023). From the Turkish perspective, Aydın-Düzgit emphasises that this deadlock weakened the anchoring effect of European conditionality, reducing incentives for regulatory convergence and fuelling an increasingly transactional relationship (Aydın-Düzgit, 2024). As a result, the process remained formally open but politically paralysed, contributing to Türkiye's search for strategic alternatives beyond the European axis. A decade characterised by stagnation began, with limited progress and recurring setbacks between 2008 and 2016, leading to a gradual erosion of the relationship between Türkiye and the EU (Toygür *et al.*, 2022: 24).

The 2016–2018 period marks a key turning point. Characterised by the attempted coup in July 2016 and the subsequent introduction of the presidential system, this period saw a transformation of the Turkish political system and its foreign policy, which became more personalised and centralised (Toygür *et al.*, 2022: 11). As a result, accession negotiations with the EU have been formally frozen since 2018 due both to democratic setbacks and the accumulation of bilateral disputes since 2016, with the evolution of the relationship now closely linked to the internal development of Turkish democracy (Müftüler-Baç, 2025).

Since then, the rift between Ankara and Brussels has widened. European Commission reports show a growing deterioration from 2017 onwards, when their tone became more negative. The 2022 Report on Türkiye highlighted the lack of progress on the political and economic reforms necessary for accession,

noting even setbacks in key areas¹. The European Commission's 2023 Progress Report reinforced this assessment by stating that 'accession negotiations with Türkiye have remained at a standstill since 2018' and that 'serious concerns' regarding the deterioration of democratic standards and the rule of law had not been addressed². In this way, the Commission itself acknowledged that the accession dialogue had been paralysed for years by internal developments in Türkiye. The 2024 and 2025 reports follow the same line. Specifically, the 2025 report highlights the growing number of questions regarding Türkiye's adherence to its democratic tradition and concerns regarding the independence of the judiciary. Nevertheless, the European Commission's 2024 and 2025 Türkiye Reports have reiterated that Türkiye 'remains a key partner and a candidate country'³. Overall, the assessment of EU-Türkiye relations since 2018 is one of a structural stalemate in the accession process and a gradual political drift apart, combined with a practical interdependence that compels both sides to cooperate on a selective basis (Müftüler-Baç, 2018).

Despite these tensions, the EU recognises that Türkiye continues to play a key role in the region. The European Parliament has highlighted its role as a bridge between Europe and Asia and its contribution to regional stability when it cooperates actively. The European Parliament's resolution of 7 May 2025 reaffirmed that Türkiye, in addition to being a candidate country and a NATO ally, is a strategic partner in areas such as trade, security, the fight against terrorism and migration management, highlighting its role in the Eastern Mediterranean and in the Syrian conflict⁴. In the latter area, refugee management is particularly relevant: Türkiye hosts the largest number of refugees in the world, around 3.1 million, the majority of whom are Syrian. The 2016 EU-Türkiye agreement helped to stem migration flows to Europe, and the EU has provided nearly ten billion euros in aid for refugees on Turkish soil since 2011, recognising Ankara's efforts in this area⁵.

¹ See: https://enlargement.ec.europa.eu/turkiye-report-2022_en

² See: https://enlargement.ec.europa.eu/turkiye-report-2023_en

³ The latest Türkiye Reports from the European Commission for 2024 and 2025: https://enlargement.ec.europa.eu/turkiye-report-2024_en; https://enlargement.ec.europa.eu/turkiye-report-2025_en

⁴ See: https://www.europarl.europa.eu/doceo/document/TA-10-2025-0092_ES.html (section K)

⁵ See: https://enlargement.ec.europa.eu/countries/turkiye/eu-support-refugees-turkiye_en?utm_source=

Looking to the immediate future, the development of the relationship will depend largely on the geopolitical context, in particular the war in Ukraine. Although the multipolar environment has pushed Türkiye towards greater Eurasian openness, Erdoğan's re-election in 2023 was accompanied by the appointment of technocrats perceived as pro-Western, strategic continuists or pragmatists to key portfolios, such as Finance and Foreign Affairs, which some analysts interpreted as an attempt to repair relations with the West on the economic front. In 2024, the European Commission noted a slight increase in sectoral dialogue with Türkiye (high-level dialogues), suggesting that neither side wishes for a break⁶. Given the deep economic interdependence—the EU is Türkiye's main trading partner and investor, a role that is difficult to replace—pragmatism dictates that channels must remain open (Mankoff and Sağlam, 2025). Nevertheless, until Ankara moves back towards political and regulatory parameters closer to those of Europe, integration with the EU is likely to remain on hold and Türkiye is likely to continue exploring alternatives in other international forums. However, the proposal to seek channels or formulas for close, but non-integrative, partnership that reduce mutual ambiguities and resentments is being heard in some forums⁷.

2.2 Türkiye and the transatlantic link: an indispensable NATO partner with its own agenda

Ankara regards NATO membership as an integral part of its global identity and a pillar of its national security. The collective guarantee of Article 5 of the Washington Treaty remains a key factor: Türkiye views the Atlantic Alliance as the 'cornerstone of Euro-Atlantic security' (Ministry of Foreign Affairs of the Republic of Türkiye, n. d. b) and a fundamental source of support in the face of regional threats. As an active member, Türkiye contributes significantly to the principle of the 'indivisibility of security' within NATO (Ministry of Foreign Affairs of the Republic of Türkiye, n. d. a). Within the broader context of the Alliance, Türkiye's

⁶ See: <https://enlargement.ec.europa.eu/system/files/2023-11/Joint%20Communication%20to%20the%20European%20Council%20-%20State%20of%20play%20of%20EU-Turkey%20political%2C%20economic%20and%20trade%20relations.pdf> (p. 15).

⁷ See: Turning Towards Türkiye: Why NATO Needs to Lean into Its Relationship | RAND

contribution remains highly valued: Ankara has participated in all NATO crisis management missions and typically provides substantial troop numbers. Türkiye, despite some isolated controversies, is a very important contributor and supporter with⁸. It provides the second-largest armed forces among all allies (Yapar, 2021: 3). Furthermore, it has provided outstanding support to NATO missions in Bosnia, Kosovo, Afghanistan and other international operations. NATO itself has recognised Türkiye as a highly valued ally (NATO, 2023).

Within this framework of structural contribution, Türkiye's participation in NATO's nuclear deterrence policy also features. Although the Alliance maintains a deliberate policy of ambiguity, open sources agree that the Incirlik airbase houses US tactical nuclear weapons (B61 bombs), under US control and custody (but with certain restrictions on how they would be used), as part of the extended deterrence framework and nuclear sharing arrangements in Europe (Kristensen *et al.*, 2025). This element reinforces Türkiye's status as a strategic ally of the first order.

However, Türkiye-NATO relations entered a new phase from 2018 onwards due to a shift in the pattern of interaction: Türkiye maintains its strategic value and operational contribution, but raises the political cost of allied cohesion and more openly utilises its comparative advantages within NATO to impose its own priorities in pursuit of greater bargaining power (Pénzváltó, 2025). Without abandoning its formal commitment or its military contribution—which remains essential on the south-eastern flank—Türkiye has begun to act in a more assertive, transactional and conditional manner. Nevertheless, it is characterised by its fulfilment of commitments and lacks the political and economic scope for a structural break with the West⁹.

A range of events contributed to this situation: firstly, the friction over Syria and the fight against terrorism (particularly regarding Western support for the Syrian Kurdish militias known as the People's Protection Units—YPG). For Ankara, this was a matter of national security, whilst for Washington it is a key instrument against Daesh (Kara, 2023). Türkiye carried out unilateral

⁸ See: https://www.nato.int/en/news-and-events/articles/news/2024/11/25/secretary-general-in-turkiye-strong-turkish-defence-capabilities-contribute-to-a-strong-nato?utm_source=

⁹ See: Turning Towards Türkiye: Why NATO Needs to Lean into Its Relationship | RAND

military operations in northern Syria against the YPG, allies of the West in the fight against ISIS but whom Ankara links to the terrorist group PKK. These interventions—such as Operation ‘Peace Spring’ in 2019—were criticised by NATO partners and led to arms export restrictions by some European countries. NATO’s official statements focused more on a message of de-escalation and proportionality¹⁰.

Furthermore, the purchase of the Russian S-400 also produced controversial results (Kara, 2023). A combination—from Türkiye’s perspective—of operational needs, frustration with the US and other allies (due to delays in negotiations or purchase conditions) and political-strategic calculations led to acquisitions that triggered a crisis with the US/NATO. Consequently, in 2020 the US imposed CAATSA (Countering America’s Adversaries Through Sanctions Act) sanctions on Türkiye, aimed at penalising countries that acquire Russian weaponry (Yapar, 2021: 15; Kutlay, Öniş; 2021: 1095). However, these sanctions, imposed according to some authors to punish autonomous behaviour, did not deter Türkiye from seeking greater self-sufficiency (Yetim and Hazar, 2023). This led the US to suspend and ultimately exclude Türkiye from the F-35 programme due to security and interoperability risks. Türkiye went from being an industrial partner and buyer to being excluded from the Alliance’s most advanced weapons system¹¹. The result was a more conditional and transactional relationship, with Ankara seeking alternatives (F-16s) without ruling out a possible return. Currently, the issue of the S-400s remains unresolved: these systems remain stored on Turkish territory pending a diplomatic solution, on which progress appears to be being made¹².

This logic of strategic autonomy is also reflected in Türkiye’s involvement in Libya. Since 2019, Ankara has maintained a political and military presence in support of the Tripoli government, consolidating its influence in the central Mediterranean and on NATO’s southern flank (Dalay, 2021). This action, undertaken without a common allied position, has caused friction with some

¹⁰ See: https://www.nato.int/en/news-and-events/events/transcripts/2019/10/18/remarks?utm_source=

¹¹ See: <https://www.iiss.org/publications/strategic-comments/2019/turkey-the-s400-and-the-f35/>

¹² See: https://www.zona-militar.com/2025/12/05/turquia-se-desharia-de-sus-sistemas-antiaereos-s-400-de-origen-ruso-para-volver-al-programa-f-35-de-los-ee-uu/#google_vignette

European partners and highlighted the Alliance's limitations in formulating a coherent strategy on Libya (Ács, 2025). At the same time, from the Turkish perspective, the intervention serves interests of security, geopolitical balance and the containment of external actors, without formally calling into question its NATO membership.

The outbreak of the war in Ukraine in 2022 once again put Türkiye's delicate balance to the test. As an ally, Türkiye condemned the Russian invasion, voted in favour of UN resolutions against Moscow and closed the Bosphorus Straits to Russian warships in accordance with the Montreux Convention¹³. Furthermore, Ankara supplied Ukraine with the renowned Bayraktar TB2 drones, which contributed to the Ukrainian defence in the early stages of the conflict. However, at the same time, Türkiye did not join the Western sanctions against Russia and has actively sought to mediate between Kyiv and Moscow, maintaining fluid communication with the Kremlin. This 'two-track approach'—supporting Ukraine, but without burning bridges with Russia—has been accepted by NATO to a certain extent, as the Alliance has valued Türkiye's role in initiatives such as the Black Sea Grain Agreement in July 2022, brokered jointly with the United Nations¹⁴ (considered a Turkish diplomatic success), and other diplomatic efforts (Sánchez Tapia, 2024: 70). It can be said that NATO has tolerated Türkiye's lack of alignment with the sanctions regime because it understands the strategic importance of keeping Ankara within the allied front, without alienating it completely. In essence, Türkiye has reinforced its geopolitical value.

Another demonstration of Türkiye's bargaining power within NATO came with the Alliance's recent enlargement. Following the invasion of Ukraine, Finland and Sweden applied to join NATO in 2022, a move requiring unanimity among the then thirty allies. Türkiye surprised everyone by blocking the start of the process, arguing that Sweden in particular was harbouring individuals and organisations linked to the PKK and had maintained an arms embargo against Türkiye since 2019¹⁵. For over a year, President Erdoğan used this veto as leverage to secure concessions. Finally, at the NATO summit in Madrid (June 2022), a

¹³ See: <https://www.rand.org/pubs/commentary/2025/03/turning-towards-turkey-why-nato-needs-to-lean-into.html>

¹⁴ See: <https://news.un.org/es/story/2022/07/1512022>

¹⁵ See: <https://www.atlanticcouncil.org/blogs/new-atlanticist/turkey-and-nato-are-stronger-with-each-other-they-must-de-thorn-their-relationship/>

trilateral memorandum was signed in which Sweden and Finland undertook to address Turkish concerns regarding terrorism and arms exports¹⁶. Erdoğan even secured a bilateral meeting with US President Joe Biden in Madrid¹⁷. As a result of these negotiations, Türkiye gave its approval: first it ratified Finland's accession (in March 2023) and then, following the Turkish elections in May 2023, Erdoğan agreed to send Sweden's ratification to parliament, which finally took place in October 2023 (Sánchez Tapia, 2024: 67). The accession of the Nordic countries became a reality with Türkiye's approval in 2023–2024. This episode showcased Türkiye as an actor capable of influencing crucial Alliance decisions to safeguard its interests, but it also underscored that it remains ultimately committed to NATO's unity. This diplomatic triumph can be regarded as a masterstroke of Turkish diplomacy, skilfully capitalising on its moment of peak influence, according to the Atlantic Council, to secure favourable outcomes in security and domestic policy without undermining allied cohesion.

In short, within NATO, Türkiye maintains a delicate balance between allied solidarity and national assertiveness. On the one hand, Ankara considers the transatlantic link vital for European security and for Türkiye itself, and remains committed to Western collective defence—as evidenced by the fact that it is among the top five contributors to NATO operations (Ministry of Foreign Affairs of the Republic of Türkiye, n. d. a). On the other hand, Ankara makes it clear that it will defend its interests, even if these diverge from the dominant Western line, whether by engaging in dialogue with Russia and China, intervening unilaterally in its neighbourhood, or vetoing allied decisions until concessions are secured. This stance has caused friction, but so far neither Türkiye nor NATO has crossed lines that cannot be repaired. The Atlantic Alliance, aware of the geostrategic importance, has preferred to accommodate Ankara's autonomy as far as possible. At the same time, Türkiye has not gone beyond certain limits either: for example, despite its rapprochement with Moscow, Ankara continues to cooperate militarily with its allies (in 2022 it supplied drones to Ukraine and supported the accession of new members to NATO, as mentioned). In essence, Türkiye's key geopolitical

¹⁶ See: <https://www.atlanticcouncil.org/blogs/turkeysources/experts-react-what-the-nato-summit-breakthrough-means-for-turkey-and-the-alliance/>

¹⁷ See: <https://www.atlanticcouncil.org/content-series/fastthinking/fast-thinking-what-turkey-won-with-its-nato-leverage/>

interests remain aligned with those of NATO¹⁸ (Akgül-Açıkmeşe and Aksu, 2024) and, overall, 2018 marks the transition to an indispensable partner with a more independent agenda, consistent with a historical tradition of Western anchoring (Edib, 1930) but reinterpreted, since Davutoğlu, in terms of greater autonomy and strategic centrality.

3 Aspirations towards BRICS+: Ankara's initiative to join the emerging club

In 2018, President Erdoğan publicly expressed his interest in Türkiye joining the BRICS for the first time. He attended their summit in Johannesburg as a guest, where, in a light-hearted tone, he suggested renaming the group 'BRICST', incorporating a 'T' for Türkiye (Süsler, 2025: 175). At the time, this remark was taken more as an anecdote than as a formal request. However, Türkiye's potential to move closer to the BRICS, albeit with certain reservations, had already become apparent some years earlier (Öniş and Kutlay, 2013). The move towards this club was presented not as a substitute for its traditional alliances or an anti-Western ideological shift, but as part of a quest for prestige, autonomy and greater influence for Türkiye (Bacık, 2013).

Six years later, in September 2024, the AKP confirmed that Türkiye had officially submitted its application to join the BRICS+ bloc¹⁹. Erdoğan was invited to the BRICS+ summit in Kazan (Russia) in October 2024 and, in November of that year, Ankara was granted 'partner country' status within the bloc²⁰, a category created in the wake of internal tensions within BRICS (Alaranta and Hadi, 2025), but has not clarified whether it will accept the partner status offered. This move followed the August 2023 BRICS summit in South Africa, at which the group announced its first major expansion by inviting six new members (Saudi Arabia, the United Arab Emirates, Egypt, Iran, Ethiopia and Argentina). Türkiye was not included in that initial round, which is believed to have prompted Ankara to take proactive steps to be considered in the future. In response, the BRICS countries initially offered Türkiye

¹⁸ See: <https://www.rand.org/pubs/commentary/2025/03/turning-towards-turkey-why-nato-needs-to-lean-into.html>

¹⁹ See: https://ecfr.eu/article/building-brics-what-erdogans-geopolitical-gamble-could-mean-for-the-west/?utm_source=

²⁰ See: <https://www.voanews.com/a/brics-offered-turkey-partner-country-status-turkish-trade-minister-says-/7863488.html>

this 'partner country' status. This role, introduced specifically at the 2024 Kazan summit, entails a close partnership without immediate full membership—that is, a transitional period leading to eventual full membership (it allows participation in meetings, but does not grant voting rights or access to all structures). In the official statement issued on 23 October 2024, the BRICS+ welcomed the 'considerable interest of the countries of the Global South in the BRICS' and endorsed the modalities of this new partner country category. Although the communiqué did not mention specific nations, it is clear that Türkiye is among them.

This shift forms part of Ankara's broader strategy to diversify its alliances and strengthen its role in a multipolar world order. Among the members of BRICS+, Russia and China stand out in particular, with whom Türkiye has forged closer ties in recent years despite specific differences. With Russia, Ankara maintains multidimensional relations based on 'competitive cooperation' (Alaranta and Hadi, 2025).

Ankara will likely weigh up the costs and benefits carefully: formally joining a bloc perceived in the West as counter-hegemonic could further strain its relations with the United States and the EU. Nevertheless, it is telling that European institutions are already taking note of this shift. The European Parliament, in its resolution on Türkiye of 7 May 2025, highlights that 'Türkiye has applied for membership of BRICS+' and has shown interest in the Shanghai Cooperation Organisation (SCO), which from a European perspective is interpreted as part of Türkiye's drift away from the Western orbit. However, this situation would have been almost impossible had Türkiye been an EU member, according to statements by the Minister of Foreign Affairs, Hakan Fidan²¹. Furthermore, Türkiye attended the BRICS+ summit in Rio de Janeiro (June 2025), represented by its Minister of Foreign Affairs, but it was not confirmed whether it accepted the role of partner.

Türkiye's motivations for moving closer to BRICS+ are both geo-economic and geopolitical. On the one hand, on the geo-economic front, Türkiye sees potential BRICS+ membership as an opportunity to diversify its trade links and sources of investment, reducing its dependence on the European market and achieving greater strategic autonomy to act more independently of

²¹ See: <https://www.euronews.com/2024/09/19/turkey-wouldnt-be-interested-in-brics-if-it-was-an-eu-member-state-foreign-minister-says>

Western powers (Kutlay and Öniş, 2021: 1094). The EU remains its main trading partner, but delays in modernising the Customs Union and other frictions are leading Ankara to 'seek opportunities rather than alternatives'²². The BRICS+ countries represent huge emerging markets where Türkiye wishes to have a greater presence. Furthermore, joining them fits into Türkiye's 'balancing act' between the West and the Global South. Full membership would give Ankara a voice in a key forum of non-Western powers, reinforcing its image as an autonomous global actor. It would also allow it to align with alternative financial initiatives, such as the New Development Bank of the BRICS+, thereby reducing some of its economic vulnerabilities.

In essence, from a geopolitical perspective, this manoeuvre deepens its alliances with non-Western powers, thereby granting it greater room for manoeuvre in international negotiations (Süsler, 2025: 176–177). Joining BRICS+ also has an appeal: the ability to complement its relations with the West and other geographical regions without severing the transatlantic link. This rhetoric resonates in Ankara's discourse in favour of a more equitable international system. It is worth noting that Türkiye's critique of the Western order is more ontological than confrontational: countries such as Türkiye, Brazil, India or South Africa question Western hegemony, but at the same time wish to maintain constructive ties with the West (Alaranta and Hadi, 2025). Erdoğan has cultivated the narrative that Türkiye, despite being a member of NATO, defends the interests of the Muslim world and developing nations against Western impositions. Potential membership of BRICS+ would reinforce this narrative both domestically and in its international projection.

Conclusions

This chapter has shown that Türkiye's positional relations with the West and the BRICS+ can be explained as the expression of a long-term strategic logic: the pursuit of recognition, security and autonomy from a structural position as a pivotal country. In this trajectory, the intellectual frameworks embodied by Halide Edib and Ahmet Davutoğlu do not represent two mutually exclusive options, but rather two frameworks that continue to

²² See: BRICS offered Turkey partner country status, Turkish trade minister says | Reuters. Also: <https://www.euronews.com/2024/09/19/turkey-wouldnt-be-interested-in-brics-if-it-was-an-eu-member-state-foreign-minister-says>

coexist in contemporary Turkish discourse: Western anchoring as a normative and security horizon, and the assertion of Türkiye as a 'central power', with strategic autonomy and multidirectional influence in an increasingly post-Western order.

Since 2018, Türkiye has consolidated a more or less stable pattern: it preserves the essential benefits of Western anchoring—security, market access and institutional status—whilst exploring alternative formulas for projection and recognition outside this framework. In relations with NATO, this situation translates into an indispensable partner that accepts collective defence, but which raises the political cost of allied cohesion. With regard to the EU, there is a combination of functional interdependence and paralysis. As for the BRICS+, this can be interpreted not as an 'anti-Western turn', but as an incremental strategy of rapprochement and strategic diversification aimed at maximising room for manoeuvre in a multipolar environment.

However, this autonomy continues to face structural limits. Economic dependence on Europe, military interoperability with NATO and the need for financial stability constitute very significant ties. Hence, its foreign policy is based more on the calculated overlapping of cooperation frameworks than on the replacement of alliances.

For the West, the challenge is not whether Türkiye 'chooses' between blocs, but whether the EU and NATO are prepared to manage, in a sustainable manner, an ally that no longer accepts a peripheral position or a logic of unilateral conditionality. The relationship with Türkiye appears to be heading not towards a rupture, but towards a lasting formula of selective cooperation, controlled friction and mutual dependence.

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Chapter Eight

From Ankara to the Sahel: Türkiye strengthens its influence in Africa

Rafael Santiago Orti

Abstract

Africa has established itself as one of the key priorities of Turkish foreign policy, as the continent brings together a broad spectrum of strategic interests in the fields of energy, trade, economics and diplomacy, as well as an Ottoman historical legacy and religious and cultural affinities. Türkiye's initial penetration of Africa through humanitarian and development cooperation policies generated widespread goodwill and allowed it to avoid the neo-colonial perception associated with other powers. This distinctive 'soft power', drawing on the Ottoman heritage and Islamic ties, gives Ankara a competitive advantage over Western actors, Russia and the People's Republic of China (PRC). Gradually, Türkiye has complemented these soft tools with a more assertive economic presence and a growing military and diplomatic footprint. Today, the country positions itself as a key player on the African continent, acting as a mediator in regional conflicts and consolidating its influence through increasingly visible and operational military capabilities.

Keywords

NATO, EU, Multipolarity, Realism, Türkiye.

Introduction

Recent geopolitical developments are reflecting significant changes in the so-called world order. This reconfiguration is strongly influenced by the rise of the People's Republic of China (PRC), the retreat of democracies and the growth of middle or regional powers, among which Türkiye is included, alongside a range of other factors. This realignment, shaped by a context of multiple hotspots of conflict and strategic tension that create an environment of uncertainty, is facilitating a repositioning of the many powers playing this global game, which now have a new opportunity to realign their interests and approaches in the search for new resources, alliances and strategies.

The circumstances of Africa—long marginalised, yet possessing vast resources, unstable and malleable governments, and a privileged strategic position—offer an unparalleled landscape for a multitude of middle powers seeking to expand their sphere of influence. It is therefore not surprising that the African continent has become a magnet for numerous countries competing with one another for control of trade routes or the exploitation of natural resources, two of the continent's many economic attractions.

Türkiye's gradual penetration into Africa, initially underpinned by soft power instruments (humanitarian aid, cultural and religious diplomacy, and educational cooperation), has evolved—thanks to the success of these policies—towards broader and more complex initiatives that combine elements of hard power, particularly the military and security dimensions. One of the clearest signs of Türkiye's growing interest in Africa is the increase in the number of embassies, which almost quadrupled between 2002 and 2022. Similarly, the number of flight routes operated by Turkish Airlines increased by approximately 1,140% since 2005, and the value of bilateral trade between Türkiye and Africa increased eightfold between 2003 and 2022, among other relevant indicators (Vial and Bouvier, 2025a).

1 Historical and strategic context

Türkiye's ties with the African continent are not a recent phenomenon. The historical presence of the Ottoman Empire dates back to the 16th century, when its interests were focused on the Mediterranean coast and the Horn of Africa, given their strategic importance. Following a prolonged period in which Turkish influence in the region was limited, the rise to power of the

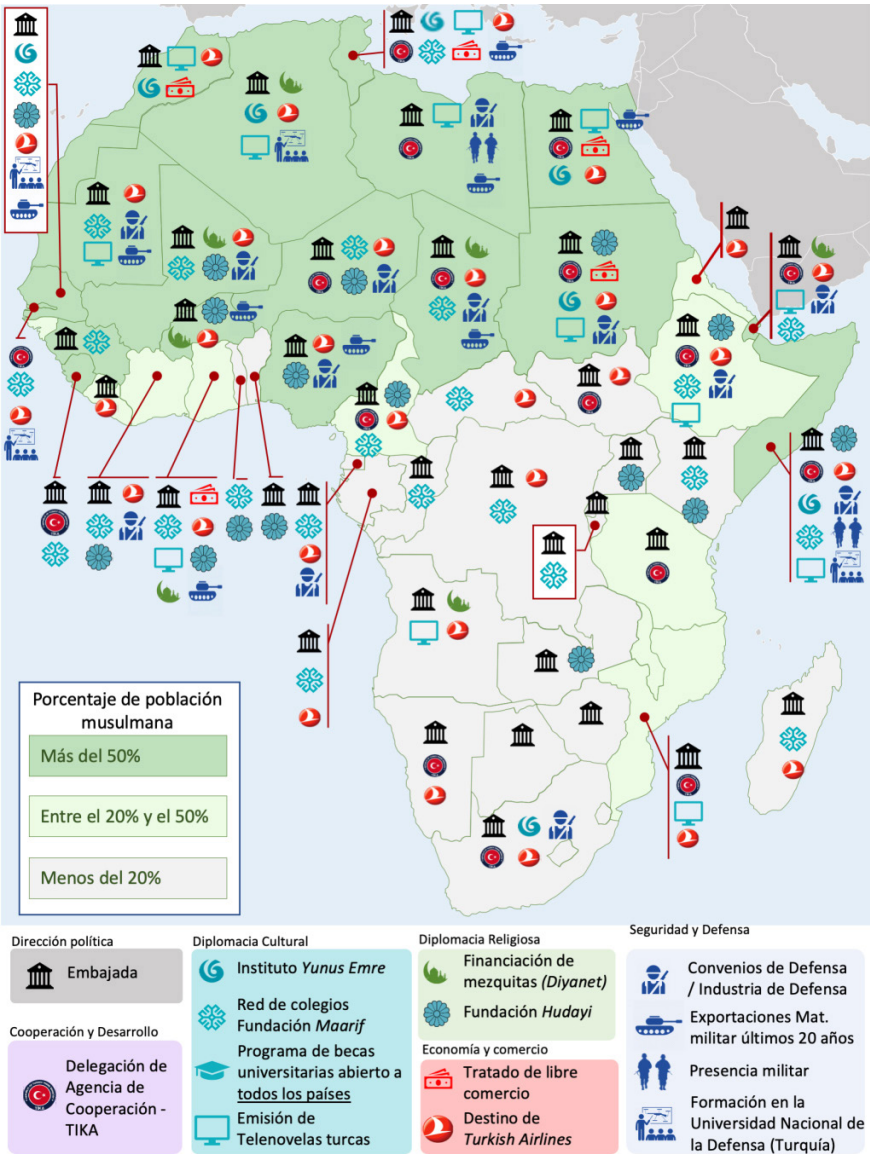


Figure 1. Türkiye's presence in Africa (Sánchez, 2023)

Justice and Development Party (AKP) and the figure of Recep Tayyip Erdoğan marked a significant shift in Turkish foreign policy, in which Africa took on a central role. A telling example is that 2005 was declared the Year of Africa for Türkiye, and that in 2008 the country became a strategic partner of the African Union (Mamouni, 2025).

Following the Arab Spring, Türkiye's approach took on a more pragmatic stance as prospects for integration into the European Union diminished. Some authors argue that the impetus for Türkiye's policies towards Africa stemmed from the cooling of relations with Europe, a consequence of repeated failures in the accession process as a member state. In this interpretation, Africa emerges as a viable strategic alternative in the face of such European rejection (Mamouni, 2025).

The fostering of ties with the African continent, promoting South-South dialogue and seeking to expand its global presence, is contextualised within the opportunity arising from the decline of US hegemony and the rise of middle powers, with actions that have evolved from soft power to more evident and tangible manifestations of hard power, primarily through military and security instruments. This hybrid strategy was conceptualised by former Prime Minister Ahmet Davutoğlu as 'virtuous power', an approach that seeks to project influence through the simultaneous integration of soft power and hard power without resorting to the traditional unilateralism of the great powers (Sánchez, 2023). All these tools of influence pursue interrelated objectives, such as expansion into new markets, the generation of political and economic influence, and the search for new energy sources.

Turkish interests in sub-Saharan Africa span multiple areas, amongst which energy holds a priority position. Türkiye faces a clear structural disadvantage compared to other competing middle powers due to its almost total lack of domestic energy resources, which results in high external dependence. This strategic vulnerability means that diversifying suppliers and securing supply routes are central objectives of its foreign policy. It is within this context that efforts to establish long-term energy partnerships with African producer countries are situated. Notable examples include the agreements signed with Algeria for gas supplies (Mamouni, 2025), the de facto monopolisation of Turkish imports from Nigeria in the form of liquefied natural gas (LNG) and oil (Sánchez, 2025), and the contracts for the exploration and exploitation of hydrocarbons in Somali waters signed with Mogadishu (Kemal, 2025). Furthermore, Turkish companies are actively involved in the extraction of strategic minerals in Sahel countries (Ozen and Nelson 2025) and in uranium-related projects in Niger (Parens and Plichta, 2025).

A second fundamental pillar of Türkiye's presence on the continent is the strengthening of economic cooperation through the

signing of trade and investment agreements. Türkiye has become a regular participant in African economic summits (Africa-Türkiye Partnership Summits) and in African Union forums. As a result of this strategy, the volume of bilateral trade between Türkiye and sub-Saharan African countries rose from USD 1.35 billion in 2003 to over USD 12.4 billion in 2023, representing an average annual growth rate of over 11% (Parens and Plichta, 2025).

There are two main areas of Turkish engagement. On the one hand, Libya and the Mediterranean coast constitute Türkiye's natural neighbour due to their proximity to the African continent. As will be examined in detail later, Libya is Türkiye's natural gateway to the region, which also possesses significant resources despite the complex and fragile situation that has prevailed since Gaddafi's death.

On the other hand, Somalia, and by extension the Horn of Africa, constitutes another area of particular interest for Ankara. Beyond being a strategic enclave controlling the Red Sea and direct access to the Indian Ocean—key for maritime trade routes and a historic target for pirates—it possesses considerable hydrocarbon reserves and serves as a privileged gateway to other countries in the region. Furthermore, Türkiye operates a military training centre in the country for Somali troops, the largest that Ankara has abroad, as stated by Vial and Bouvier (2025c). This presence is understood in the context of Somalia's extreme fragility, a state classified by numerous experts as failed.

The African continent attracts the attention of numerous external powers, although Türkiye stands out for having made the most significant progress in its recent expansion.

The PRC maintains a dominant presence through the Belt and Road Initiative (BRI), characterised by massive investments—amounting to hundreds of billions of USD in loans and direct investment—in critical infrastructure (railways, ports, roads), energy sectors and mining. This expansion is driven both by Chinese demand for natural resources, including minerals critical to the energy transition, and by broader geopolitical objectives: securing trade routes and countering Western influence, thereby consolidating Beijing's position as the foreign actor with the greatest capacity to mobilise capital on the continent (Yade and Arslan, 2025).

Russia, for its part, has seen a significant decline in its historical influence. Although it maintains a military presence through

the Africa Corps (the official successor to the Wagner Group and part of the Russian Ministry of Defence), its operations are mainly limited to the Sahel and Central Africa (Mali, the Central African Republic, Burkina Faso, Niger and Libya), offering support in security, protection of mining resources (especially gold and uranium) and local training in exchange for economic concessions. However, international sanctions stemming from the war in Ukraine, operational losses and internal transitions have significantly restricted its reach (Ozen and Nelson, 2025).

France, a traditional postcolonial power, has experienced a gradual and forced withdrawal from the Sahel, its historical sphere of influence, culminating in the complete withdrawal of troops since 2022 from Mali, Burkina Faso, Niger and Chad. This process was driven by anti-Western *coups d'état* and growing anti-French sentiment, centred on narratives of national sovereignty. The resulting vacuum has been rapidly filled by Russia and Türkiye, highlighting a profound regional geopolitical rebalancing (Parens and Plichta, 2025).

The United States, by contrast, is adopting a selective approach centred on strategic investments to compete in global supply chains. A prime example is the Lobito Corridor in Angola: a modernised railway linking the Atlantic port of Lobito with copper- and cobalt-rich mining areas in the Democratic Republic of the Congo and Zambia. Backed by US funding, the project made significant progress in 2025 with the awarding of contracts and the start of construction, positioning itself as an alternative to the routes dominated by the PRC (Yade and Arslan, 2025).

In summary, whilst the PRC leads with an expansive and multifaceted strategy, Russia maintains military niches in contexts of instability, France is retreating from its traditional strongholds, and the United States is focusing on specific projects of high strategic value, shaping an African landscape of intense competition among external powers.

2 Dimensions of Türkiye's presence

This section will analyse the instruments used by Türkiye to achieve its objectives in Africa. Using the acronym DIME, employed by Baqués (2021), which summarises the main variables of state power into four dimensions (diplomatic, informational, military and economic) and applying it to the Turkish case,

it is more appropriate to integrate the diplomatic dimension with the humanitarian one and to add a religious variable, closely linked to the educational and cultural spheres.

2.1 Diplomatic and humanitarian

Since the late 1990s, humanitarian aid has been one of Türkiye's main gateways to the African continent and has evolved into one of the most established instruments of its soft power. In contrast to the predominantly commercial approach of the PRC or the security-focused approach of France and the United States, Ankara has developed a South-South cooperation strategy that combines technical assistance, food aid and development projects with a narrative of Islamic solidarity and the absence of a colonial past.

The primary implementing body for this policy is the Turkish Cooperation and Coordination Agency (Türk İşbirliği ve Koordinasyon Ajansı Başkanlığı, TİKA). This agency currently maintains programme offices in 22 African countries and implements projects in more than 54 across the continent (see Figure 1). Between 2005 and 2023, Türkiye allocated more than USD 6 billion to development cooperation in sub-Saharan Africa, with a particular focus on health, education, agriculture and the restoration of Ottoman-Islamic cultural heritage (Fidan, 2023). This assistance not only addresses immediate needs but also generates symbolic capital and networks of gratitude that facilitate subsequent Turkish commercial and political penetration.

At the same time, and faced with the structural impossibility of competing in terms of hard power with the great powers, Türkiye has chosen to position itself as a mediating power in regional conflicts, a strategy typical of middle powers seeking to maximise their influence through diplomacy. The most visible success has been Turkish mediation in the Russian-Ukrainian conflict, but sub-Saharan Africa and especially the Horn of Africa have become the main testing ground for this diplomacy of mediation. Ankara played a key role in the rapprochement between Ethiopia and Eritrea (facilitating indirect contacts prior to the 2018 peace agreement), mediating between Somalia and Kenya in maritime disputes, and acting as a guarantor in the Mogadishu talks. Türkiye also led the negotiations that culminated in the partial reconciliation between Somalia and Ethiopia under Turkish auspices (Kemal, 2025). This mediation diplomacy is not altruistic: it

operates as a strategic multiplier. Each successful peace process reinforces Türkiye's image as a reliable actor, opens up opportunities for reconstruction contracts (often awarded to Turkish companies), facilitates military cooperation agreements—primarily in the sale of drones—and consolidates trade routes (Dal and Dipama, 2023) in previously inaccessible regions.

In conclusion, the synergistic combination of humanitarian aid managed by TİKA and active mediation diplomacy has enabled Türkiye to build a sustainable presence in Africa without resorting to coercion or massive investments, as Beijing does. This strategy not only diversifies the options available to African states but also positions Ankara as an indispensable mediating power in one of the most dynamic geopolitical spaces of the 21st century (Republic of Türkiye, 2022).

2.2 Economic

The trade and economic spheres constitute one of the fundamental pillars of Türkiye's foreign policy in sub-Saharan Africa and North Africa. This priority stems, to a large extent, from Ankara's awareness of a structural weakness compared to other middle powers: the scarcity of its own energy resources. Consequently, the Turkish government has sought to position itself as a reliable trading partner that promotes mutually beneficial relations, in contrast to the unilateral legacy of the former European colonial powers.

Based on the study by Sánchez (2023), Turkish initiatives on the continent can be classified into several areas, with three main pillars standing out: bilateral trade, direct investment, and energy and infrastructure cooperation. The growing presence of Turkish companies, both public and private, in implementing the agreed projects is reflected in significant quantitative indicators. One of the most visible is the expansion of the air network operated by Turkish Airlines, which in 2024 connected Istanbul directly with more than sixty destinations in forty-two African countries (Turkish Airlines. (2025)). This density of connections not only facilitates the flow of goods and services but also acts as a 'proxy' indicator of the intensification of economic and trade links.

Air links are just one further example of the growth in trade relations between Ankara and Africa, the volume of which has risen from USD 5.4 billion in 2003 to USD 37 billion in 2024 (Yade and

Arslan, 2025), and Türkiye aims to reach USD 40 billion by 2025 (Avcioglu, 2025). Turkish exports benefit from existing free trade agreements with Tunisia, Morocco, Egypt and Mauritius, although some, such as the one with Egypt, face pressure to renegotiate due to alignment with the African Continental Free Trade Area. Furthermore, negotiations are currently underway with Ghana, Djibouti and the Democratic Republic of the Congo (Republic of Türkiye, 2023).

Investments, totalling over ten billion USD, prioritise logistics and energy infrastructure, although they also cover other sectors such as healthcare and manufacturing, with examples including the new Addis Ababa airport, ports in Senegal and roads in Uganda, amounting to between 85.4 and 100 billion USD in transport and energy projects (Republic of Türkiye, n. d.) (the range varies depending on the source consulted).

The energy sector, of strategic importance given Türkiye's dependence, ranges from hydrocarbons to critical minerals and renewables, with agreements with Niger (uranium and natural gas), Burkina Faso and Somalia (onshore and offshore exploration). Access to these resources generates instability due to regional disputes, driving Turkish security cooperation programmes, such as the base in Mogadishu and training in the Sahel, to safeguard economic interests without direct intervention (Ozen and Nelson 2025).

2.3 Military and security

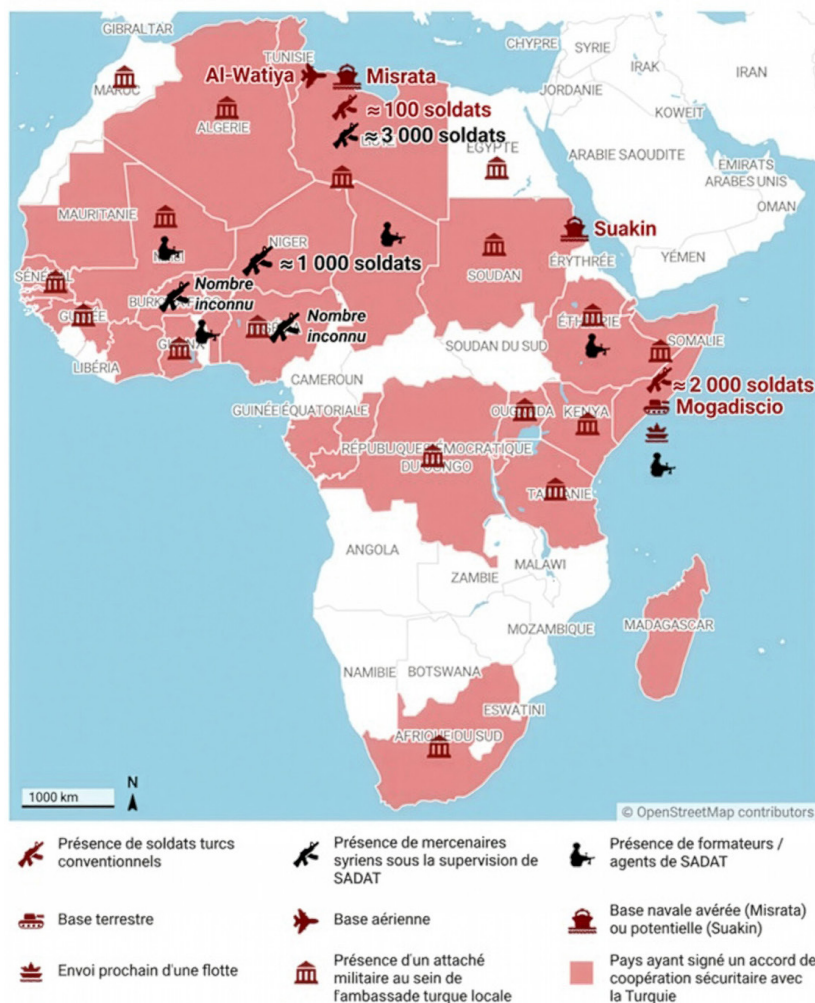
The main strategic significance of Türkiye's military deployments lies in Somalia and Libya, where Ankara is carrying out extensive training and advisory programmes for the respective national armed forces. Both cases are analysed in detail in subsequent sections.

The Turkish military presence extends across the entire continent (see Figure 2) and goes beyond conventional armed forces, incorporating instruments of influence such as private contractors, arms sales and direct cooperation.

The company SADAT, classified by many experts as an Ottoman-style analogue of the Wagner Group, operates in nine African countries (primarily Libya, the Horn of Africa and the Sahel), providing training and security services in strategic enclaves such as mining sites in Niger and Burkina Faso. Arms sales, led by

Présence militaire turque sur le continent africain

Présence officielle et officieuse



Carte: Emile Bouvier pour ©Les Clés du Moyen-Orient - Créé avec Datawrapper

Figure 2. Turkish military presence on the African continent (Vial and Bouvier, 2025b)

Bayraktar TB2 drones, reached USD 1.8 billion in 2024, equipping eighteen African states including Ethiopia, Nigeria and Kenya, and positioning Türkiye as the third-largest supplier in West Africa (Ciddi and Doran, 2025). These mechanisms, formed under more than twenty-five defence cooperation agreements (Yaşar, 2022), promote technology transfer and participation in joint ventures, although they attract criticism for their role in civil conflicts.

In summary, arms sales constitute one of the main channels for Turkish influence in specific regions of Africa, particularly those affected by territorial disputes, armed conflicts or the risk of military escalation.

2.4 Religious and educational

Türkiye has succeeded in positioning itself as a significant geo-political actor in Africa through the strategic exploitation of two distinctive identity-defining resources: the Sunni religious link and the historical memory of an Ottoman Empire perceived as non-colonial. Unlike the European powers, whose presence on the continent remains marked by a colonial legacy, or emerging actors such as the PRC and Russia, associated with predominantly commercial or security-driven agendas, Ankara projects a narrative of Islamic brotherhood and historical solidarity that generates widespread sympathy among African Muslim elites and populations.

This approach, frequently framed in academic literature as 'soft neo-Ottomanism' (Özcan, 2017), turns religious and cultural identity into a complementary (and at times more effective) tool than the classic instruments of economic or military diplomacy.

The main vehicle for this religious influence is the Presidency of Religious Affairs (Diyanet İşleri Başkanlığı), whose continental network has expanded significantly over the last two decades. In addition to training imams and distributing religious material, the Diyanet coordinates an ambitious programme of mosque construction that deliberately replicates the Ottoman-Seljuk architectural style, evident in flagship projects such as the Great Mosque of Algiers or the National Mosque of Accra. These facilities not only meet local religious needs but also serve as visible symbols of Türkiye's return to the continent and as spaces for social interaction where values and narratives aligned with Ankara's official discourse are disseminated.

In the educational and cultural sphere, Turkish diplomacy deploys an equally sophisticated strategy. The Yunus Emre Institute forms the main hub of linguistic and cultural outreach, offering Turkish language courses, exhibitions, concerts and academic programmes across the continent (Sánchez, 2023). Its explicit aim is the long-term building of symbolic capital by familiarising emerging African elites with the Turkish language and culture.

For its part, the Maarif Foundation (Türkiye Maarif Vakfı) has taken over hundreds of schools previously managed by that network in more than twenty-five African countries. Beyond the ideological dimension, Maarif offers an educational model with strong scientific components, frequently accompanied by full scholarships for university studies in Türkiye. This programme has attracted thousands of African students each year, thereby shaping a new generation of elites potentially favourable to Turkish interests (Vial and Bouvier, 2025a).

In short, the combination of religious diplomacy (Diyanet), cultural outreach (Yunus Emre) and educational outreach (Maarif) forms a soft power ecosystem particularly suited to the African context, where Muslim identity and aspirations for development are the key variables.

This strategy not only diversifies partnership options for African states but also challenges the discursive hegemony of traditional powers and consolidates Türkiye as a credible alternative on the continent's new multipolar landscape (see Figure 1).

3 Geographical study

3.1 North Africa

North Africa occupies a structurally priority position in Turkish foreign policy due to its unique combination of geographical, historical and strategic factors. The physical proximity across the eastern Mediterranean, which makes the Anatolian peninsula and the Maghreb region part of the same continuous maritime space, is complemented by a long history dating back to Ottoman times. Added to this is its status as a natural gateway to the African continent, primarily via Libya, which acts as a natural route of entry into the Sahel and the rest of the continent. This triple convergence (Mediterranean proximity, shared historical heritage and role as a privileged gateway to the continent) explains why this region, together with the Horn of Africa, has become the main theatre of Türkiye's presence across the African continent. It is no coincidence, then, that Libya and Somalia are the two countries where Türkiye has deployed military contingents.

Within this area, Libya epitomises Türkiye's strategic objectives. Following the typology proposed by Sánchez (2020), these are structured around four main dimensions:

- Gaining political and security influence on the African continent through Libya as a gateway to the Sahel.
- Privileged access to Libyan energy resources, primarily oil and gas.
- Containing the regional influence of Egypt and, to a lesser extent, the United Arab Emirates.
- The consolidation of maritime zone delimitation in the eastern Mediterranean, which expands Türkiye's exclusive economic zone.

The profound instability affecting Libya since the fall of Gaddafi in 2011 and the subsequent civil war (2014–2020) have forced Türkiye to adopt an active and resolute stance in defence of its strategic interests. Ankara chose to openly back the UN-recognised Government of National Accord (GNA) against Field Marshal Khalifa Haftar, providing direct political, logistical and military support—including the intervention of Turkish advisers and private security firms—with the aim of preventing the consolidation of a hostile power in Tripoli. This choice stems from the perception that a victory for Haftar would seriously compromise Türkiye's main route of access to the African continent and decisively strengthen the position of Egypt, its main regional rival in the eastern Mediterranean and North Africa (Sánchez, 2020).

Historical relations between Egypt and Türkiye, which have never been easy, have deteriorated significantly over the last decade. Competition over gas fields in the eastern Mediterranean, Egyptian support for Haftar during the Libyan civil war, and Cairo's adherence to the blockade imposed on Qatar in 2017 by Saudi Arabia and the United Arab Emirates have generated fresh friction between the two countries. This rivalry is not limited to the Libyan sphere, but extends to the delimitation of exclusive maritime zones and control of energy corridors (Sánchez, 2020; Rodríguez, 2022: 111).

Following Rodríguez's analysis (2022: 94–97), Morocco is considered a potential strategic ally due to economic complementarity and convergence on Mediterranean and Atlantic security matters. However, Rabat's actual influence within Türkiye's regional architecture remains limited and modest, due both to the traditional Western and European orientation of its foreign policy and to the implicit competition in the Sahel and the central Maghreb.

Tunisia and Algeria, on the other hand, can be classified as effective allies of Ankara. The intensity and frequency of high-level diplomatic contacts, the convergence of positions in multilateral forums (particularly *vis-à-vis* Egypt and the United Arab Emirates) and the deepening of military, energy and infrastructure cooperation (drones for Algeria, port reconstruction and police training in Tunisia) have consolidated a relationship of mutual trust that transcends mere economic partnership. (Rodriguez, 2022: 97–102).

The pursuit of alliances with Morocco, Algeria and Tunisia reflects Türkiye's priority of establishing a favourable Maghreb axis to counter Egyptian and Emirati influence and, at the same time, guarantee secure corridors to the Sahel and West Africa.

3.2 The Sahel and West Africa

Turkish penetration into the Sahel has accelerated due to the series of *coups d'état* that took place between 2020 and 2024 in Mali, Burkina Faso, Niger and Chad. These events led to the breakdown or suspension of defence agreements with France and the United States, creating a security vacuum that Ankara, like Moscow, was quick to exploit. Unlike its Western partners, Türkiye does not make its cooperation conditional on standards of democratic governance, which has enabled it to increase its military and political market share in the region exponentially.

In this way, Türkiye has progressively increased its presence in the Sahel through a multidimensional strategy that combines bilateral military cooperation with the region's states and, above all, the massive export of weaponry—primarily combat drones—as the central axis of its penetration. This offering is complemented by comprehensive defence agreements, intelligence sharing, technology transfer and the training of local forces, which gives Ankara a comparative advantage over other actors. Unlike the Russian model, which focuses predominantly on the deployment of private security firms and mercenaries (Wagner Group/Africa Corps), the Turkish approach is more institutional and diversified, although French and Western intelligence sources have highlighted the operational presence of the private company SADAT in Niger, with roles including the protection of Turkish assets and tactical advice to the local armed forces (Yochai, 2025; Vial and Bouvier, 2025c).

Building on this military foundation, Türkiye has diversified its instruments of influence through infrastructure and development projects led by Turkish companies. Among the most significant examples are the construction of power stations in Mali (Ozen and Nelson 2025), mining agreements in Burkina Faso (gold and manganese) (Vial and Bouvier, 2025c) and, in particular, the deepening of cooperation with Niger, the recipient of the largest Turkish investment in the Sahel in the uranium sector (Niger is the world's seventh-largest producer) (Ozen and Nelson 2025), as well as the extraction of other critical minerals.

However, this strategic commitment entails considerable risks. The extreme institutional fragility of Sahelian regimes, the recurrence of *coups d'état* and the persistent jihadist threat could jeopardise both the physical security of Turkish investments and the continuity of agreements signed with governments of precarious legitimacy.

3.3 The Horn of Africa

The Horn of Africa is one of the continent's most coveted geostrategic areas due to its privileged location: it controls the southern entrance to the Red Sea, vital for maritime traffic connecting the Mediterranean with the Suez Canal, and offers the best route to the Indian Ocean via the Gulf of Aden. This position makes the region a priority target of Turkish foreign policy under the presidency of Recep Tayyip Erdoğan (Kemal, 2025).

Türkiye's penetration began with a predominantly soft-power strategy: the humanitarian response to the severe drought of 2011 enabled Ankara to position itself as a reliable partner and gain local legitimacy.

This presence rapidly evolved into military cooperation agreements and, in 2017, culminated in the inauguration of the TURKSOM base in Mogadishu, Türkiye's largest military facility abroad, which includes a training academy capable of simultaneously training more than two thousand Somali troops.

In March 2024, both countries signed a new ten-year defence and economic cooperation agreement: Türkiye undertakes to modernise and train the Somali navy and to protect Somalia's exclusive economic zone in exchange for a share of the revenue derived from maritime and fishing resources, granting Ankara

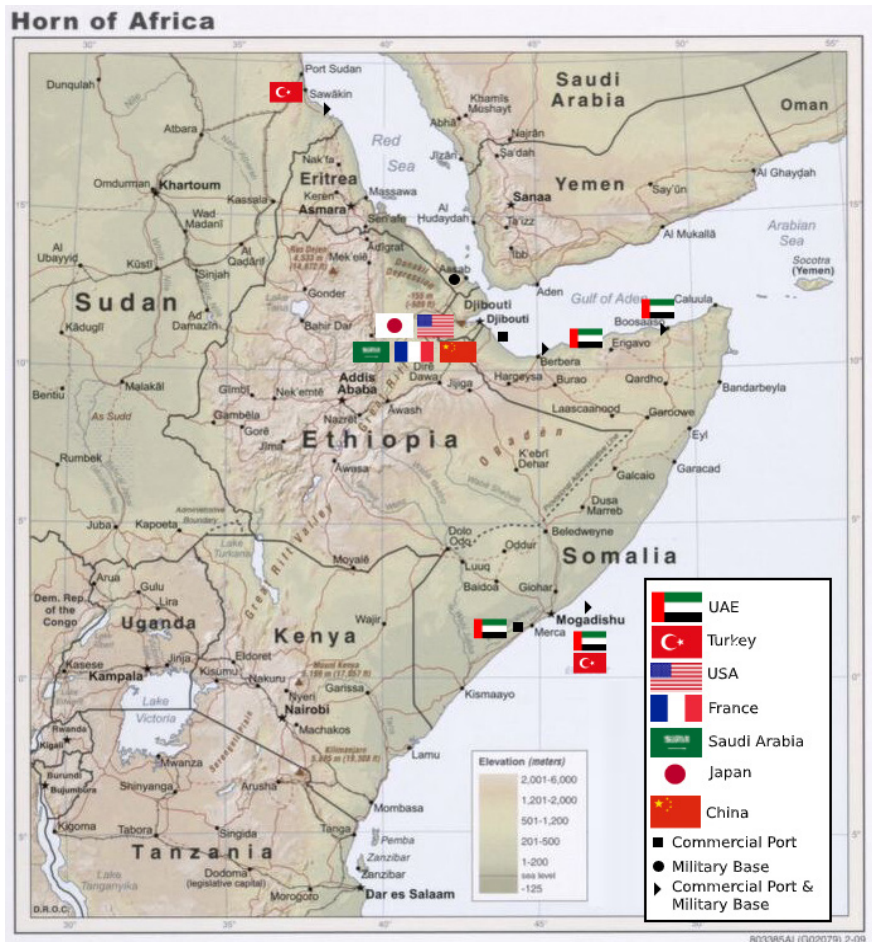


Figure 3. Foreign military bases in the Horn of Africa (Somaliland Sun, 2022)

privileged and lasting access to the Red Sea and the Indian Ocean (Sánchez, 2023).

Somalia's trajectory illustrates the characteristic model of Turkish projection in Africa: a fluid transition from soft power (humanitarian aid, investment and diplomacy) towards hard power commitments (military training, naval presence and resource protection) without the need to deploy its own combat troops in ground operations (Kemal, 2025). This contractual and advisory approach stands in stark contrast to the more interventionist approaches adopted by other international actors in a country of extreme institutional fragility, marked by decades of internal conflict, a jihadist presence and persistent maritime piracy.

The framework agreement on military cooperation signed between Türkiye and Ethiopia in 2021 confirms Türkiye's foothold in the Horn of Africa (Kemal, 2025): this pact establishes comprehensive cooperation covering the procurement of defence equipment, special forces training, intelligence sharing, industrial co-production and the establishment of joint logistics facilities. From the perspective of Ankara's regional ambitions, the agreement goes beyond a mere bilateral relationship and lays the foundations for positioning Türkiye as an alternative guarantor of security in the region.

In the specific case of Sudan, the good rapport between Khartoum and Ankara provides Erdogan with indirect levers of influence over the flow of the Blue Nile, a water resource critical to Egypt. Although Türkiye does not directly control the Ethiopian Grand Renaissance Dam, its close partnership with Addis Ababa and its logistical capacity in Sudan provide it with a position of potential leverage *vis-à-vis* Cairo, thereby consolidating its role as an indispensable actor in the water security and regional equations of North-East Africa (Sánchez, 2023).

The combination of the TURKSOM base in Somalia, the growing Turkish naval presence in the Red Sea and the alliance with Addis Ababa enables Ankara to establish a Mogadishu-Addis Ababa-Khartoum strategic triangle that strengthens its capacity for projection into the interior of the continent.

3.4 Central and Southern Africa

Türkiye's presence in the central and southern regions of the African continent is significantly smaller compared to other priority areas for Ankara, such as the northern Mediterranean (particularly Libya) or the Horn of Africa (with an emphasis on Somalia). In these secondary areas, Türkiye's interests are predominantly focused on economic and diplomatic aspects, with an emphasis on bilateral trade, investment in infrastructure and mining, and cooperation on human development.

Türkiye maintains significant ties with countries such as the Democratic Republic of the Congo (DRC), Zambia and Angola, underpinned by trade agreements and high-level visits. In the DRC, diplomatic relations have taken the form of mutual embassies and Turkish offers of mediation in regional conflicts, although these have been rejected in some cases (Dal and Dipama, 2023).

The shared interest in the DRC's abundant mineral deposits, rich in cobalt, copper and other critical minerals, attracts numerous international actors; however, fierce competition from the PRC and the United States over the exploitation and control of these resources limits opportunities for Turkish direct investment in the extractive sector, steering Ankara's presence towards general trade and diplomatic cooperation (Yade and Arslan, 2025).

As for the southern region, Ankara maintains close ties with South Africa, one of its main trading partners on the continent, driven by economic and commercial considerations, mutual investment and cooperation in light defence. South Africa represents a key market for Turkish exports and an ally in multilateral forums, albeit without the level of military engagement seen in other regions (Gencoglu, 2025).

Conclusions

Türkiye's foreign policy in Africa forms part of a long-term strategy designed in Ankara, aimed at diversifying alliances and sustainably increasing its international influence. This policy is characterised by marked pragmatism and considerable adaptability, enabling Türkiye to respond swiftly to changes in regional dynamics and capitalise on emerging spheres of influence within an increasingly multipolar international system.

The remarkable growth of its diplomatic, economic and military presence on the continent is a prime example of the opportunities that middle powers are able to exploit in the current global order. This advance, however, does not necessarily imply direct confrontation or a strategic threat to established great powers such as the United States, the PRC or Russia, but rather fits into a logic of selective complementarity and the exploitation of niches left by these countries due to the relative retreat or reorientation of their respective African agendas.

However, the most significant competition for Türkiye in Africa does not come primarily from the major powers, but from other middle powers with their own ambitions on the continent. Among these, the United Arab Emirates and Egypt stand out due to their capacity and strategic interests.

The United Arab Emirates has established a significant presence in key geopolitical hubs such as Libya, Sudan, Somalia and the Horn of Africa, through port investments, military bases, security

contracts and arms exports. Although its human and demographic resources are limited, its financial power and willingness to project force through 'proxies' and private military companies give it disproportionate influence in certain scenarios. Consequently, its rivalry with Türkiye is particularly evident in active conflict zones (Libya, Somalia) and in the arms and security services market.

Egypt, for its part, has historically constituted the most structural counterweight to Türkiye's claims to regional leadership, both in the Arab world and in the wider Sunni sphere. Competition between Cairo and Ankara has been marked by ideological differences, disputes over post-Arab Spring political legitimacy, and direct rivalries in Libya and the eastern Mediterranean. However, the process of diplomatic normalisation initiated in 2021 and consolidated through high-level exchanges in 2023–2024 has substantially reduced the likelihood of open confrontation in the short and medium term. This thaw suggests that, at least temporarily, both actors prefer to prioritise internal stability and pragmatic cooperation over third-party competitors, which could open up opportunities for tactical coordination or at least less destructive competition.

The military sphere, however, represents the greatest risk factor in the medium and long term. Certain defence decisions by Ankara, such as the establishment of permanent bases, the mass sale of drones or direct involvement in conflicts, could be interpreted by African governments as a threat to their sovereignty or as a destabilising factor, thereby eroding the image of benevolent neutrality cultivated by Türkiye.

The recent experience of France (the Sahel) and Russia (the Central African Republic, Libya) shows that the military repositioning of external powers quickly generates local resistance when it is perceived as interventionist or aligned with one of the warring parties. Added to this is the reputational risk arising from the proliferation of Turkish weaponry in scenarios of civil war or ethnic-religious tension, as well as the potential implication in breaches of UN embargoes or accusations of complicity with non-state actors.

Despite these vulnerabilities, Türkiye possesses significant comparative advantages that set it apart from its competitors. Firstly, it has managed to build up considerable symbolic capital and legitimacy among broad sections of African public opinion, underpinned by development cooperation, an extensive educational

scholarship programme, a visible humanitarian presence (TIKA) and active cultural diplomacy (the presence of Turkish TV series, mosques and Yunus Emre centres). Secondly, its capacity for conflict mediation (demonstrated in Somalia, Sudan and, more recently, between Ethiopia and Somalia) reinforces its image as a constructive actor. Finally, the Ottoman heritage, reinterpreted as non-colonial and frequently contrasted with the European legacy, combined with religious ties and identification with the Sunni Muslim world, generates a socio-political affinity that facilitates the projection of soft power and opens doors that remain closed or ajar to other external actors.

In short, Türkiye's African policy illustrates the capacity of a middle power to significantly expand its room for manoeuvre in a multipolar international system, through a strategic combination of diplomatic pragmatism, sustained investment in soft power and the selective development of military capabilities. Although the hard power dimension of its projection entails growing risks of local rejection and tensions with other actors, its hybrid approach, which prioritises legitimacy and societal acceptance over direct coercion, gives it, for the time being, a distinct advantage on the competitive contemporary African stage.

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Chapter Nine

Türkiye's influence in Latin America as a vector of its global foreign policy

Alfredo A. Rodríguez Gómez

Abstract

Türkiye's engagement in Latin America is not driven by an immediate priority, but rather by a deliberate strategy of gradually accumulating options. Ankara uses the region as an extra-regional testing ground to practise strategic autonomy at low political cost: first it normalises its diplomatic presence, then it builds selective economic ties and relational capital through soft power, and only at advanced stages does it introduce cooperation on security and defence. This incremental, discreet and pragmatic approach allows Türkiye to expand its international room for manoeuvre without direct confrontation with major powers. For Spain and the European Union, the risk is not an immediate threat, but the silent erosion of strategic initiative in an increasingly competitive landscape.

Keywords

Türkiye, Latin America, Strategic autonomy, Middle powers, International security.

Strategic introduction: why Latin America matters even when it does not yet matter

In contemporary strategic analysis, one of the most persistent errors is to confuse the absence of an immediate crisis with strategic irrelevance. The processes that ultimately upset the balance of power rarely present themselves as explicit threats from the outset; they tend to manifest first as peripheral presences, discreet initiatives or low-profile dynamics, which only become fully visible once they have matured. Türkiye's engagement in Latin America fits precisely into this category.

From a strictly material perspective, the region is not currently a priority for Ankara. The volume of trade is limited, direct investment is selective, and there is no significant military presence. However, this interpretation is insufficient—and potentially misleading—if a medium- and long-term strategic approach is adopted. Latin America's relevance to Türkiye should not be assessed by what it represents today, but by the role it plays within a strategy of gradually accumulating options.

This chapter is based on a central premise: for Türkiye, Latin America is a testing ground outside the region, as will be seen later.

From the perspective of a political-military decision-maker, this logic is particularly relevant. Strategies that operate through incremental accumulation rather than abrupt rupture are harder to detect and more costly to counter once they reach a critical threshold.

Ankara does not seek leadership in the region nor the replacement of established actors. Its approach is more sophisticated: a minimal yet sufficient presence, diversification of alliances, the building of symbolic legitimacy, and the maintenance of future options. This combination allows Türkiye to expand its international room for manoeuvre without assuming rigid commitments or disproportionate costs. The absence of direct confrontation does not imply an absence of strategic intent.

For the Euro-Atlantic environment, and in particular for the European Union and Spain, this dynamic poses a conceptual challenge that is more than immediate: how to identify and manage strategic processes that do not manifest as classic threats, but which progressively erode political, normative and security

exclusivities. Ignoring these dynamics due to their initially low profile often leads to belated and reactive responses.

From this perspective, Latin America becomes significant precisely because it is not a priority theatre. It is in these spaces that assertive middle powers find greater freedom of action to test behaviours that can later be transferred—more effectively—to strategically more sensitive environments.

Latin America is not a declared political priority for Türkiye, but it is an area of high functional strategic value. It is precisely its secondary status on the official agenda that makes it useful as a testing ground for experimentation, learning and the incremental accumulation of options, without the political costs associated with central theatres.

1 Türkiye as an assertive middle power: operational framework and relevance for decision-making

The concept of a middle power has evolved significantly since its classical formulations. In contrast to approaches focused exclusively on quantitative indicators—gross domestic product, military expenditure or population size—contemporary literature has emphasised the behavioural nature of these powers: what defines a middle power is not solely what it possesses, but how it acts, how it combines instruments and how it adapts its behaviour to the strategic environment (Cooper, Higgott and Nossal, 1993).

From this perspective, Türkiye must be analysed as an assertive middle power, characterised by a specific combination of intermediate capabilities, sustained strategic ambition and an explicit political will to reduce structural dependencies. Ankara does not seek global hegemony or the normative replacement of the existing international order, but neither does it accept a subordinate role within that order. Its central operational objective is to maximise strategic autonomy, not to impose domination or lead alternative systems of global governance.

This behaviour should not be interpreted as normative revisionism or as an attempt to replace the existing international order, but rather as a form of functional revisionism, focused on practices, instruments and spheres of action rather than on formal rules or institutions.

This nuance is fundamental from the perspective of a political-military decision-maker. Türkiye does not behave like a

classic revisionist actor, willing to openly challenge the rules of the system, but rather as an adaptive actor that identifies and exploits the cracks in the international order to expand its scope for action. Its strategy is not based on direct confrontation, but on the progressive accumulation of options, the diversification of alliances and the reduction of vulnerabilities in the face of external pressures.

This behaviour is structured around three operational axes that recur consistently across different geographical scenarios and are key to understanding its outreach to Latin America and, in particular, its subsequent foray into sensitive areas such as security and defence.

Firstly, geographical and political diversification. Ankara is deliberately reducing its exposure to any single bloc, alliance or geopolitical axis by expanding its relations in peripheral regions or those traditionally considered secondary in its foreign policy agenda. This diversification does not imply a break with its traditional alliances, but rather the development of alternatives that enhance its negotiating power and reduce the strategic cost of any potential friction. Türkiye's presence in Latin America must be understood within this framework: not as a replacement for Euro-Atlantic ties, but as an expansion of its sphere of influence.

Secondly, the combined use of civilian and security instruments. Turkish foreign policy is characterised by a functional integration of political diplomacy, trade, cultural cooperation, technical assistance and security and defence projection. These instruments do not operate in isolation or sequentially, but in a coordinated and cumulative manner. The diplomatic presence facilitates economic cooperation; this, in turn, reduces political resistance, and both create the conditions for gradually introducing initiatives in more sensitive areas. From an operational standpoint, security does not appear as the starting point, but as a subsequent phase of a carefully prepared process.

Thirdly, a preference for environments of low strategic density. Türkiye prioritises scenarios where direct competition between major powers is limited or indirect, which reduces the likelihood of automatic deterrent responses and broadens the scope for experimentation. In these environments, the costs of error are lower and strategic learning is particularly valuable. Latin America fits this profile perfectly: it lies outside Türkiye's

immediate neighbourhood, has no formal security commitments with Ankara, and is not part of the hard core of the Euro-Atlantic security architecture.

For this reason, the region presents itself as a suitable operating environment for a middle power seeking to increase its presence without triggering automatic defensive responses. Türkiye's behaviour in Latin America must be analysed in the light of its recent experience in other parts of the Global South. Türkiye's actions in sub-Saharan Africa, the Middle East and the South Caucasus have demonstrated to Ankara that a combination of early diplomatic engagement, selective cooperation and an adaptable security offering can yield significant strategic benefits relative to the resources invested (Altunışık, 2022; Öniş and Kutlay, 2017).

From this perspective, Latin America is not an end in itself, but rather another link in a chain of extra-regional projection. Ankara does not need immediate or visible results to consider its strategy a success. It is sufficient for it to be present, learn from the environment, build functional relationships and keep its options open. This incremental approach is particularly effective in an international system characterised by normative fragmentation, the erosion of liberal consensus and growing competition between major powers.

1.1 Strategic autonomy as a guiding principle and precursor to security projection

The notion of strategic autonomy occupies a central place in contemporary Turkish foreign policy and acts as a common thread linking diplomacy, the economy and, progressively, security and defence. Unlike other actors who employ this concept defensively or rhetorically, Ankara has operationalised it as a guiding principle of international conduct. In practical terms, this involves reducing external vulnerabilities, expanding alternative suppliers and avoiding exclusive dependencies in critical areas such as energy, defence, finance and technology.

From a security perspective, this approach translates into a deliberate policy of diversifying scenarios. Türkiye seeks to ensure that its international projection is not constrained by a single theatre, alliance or institutional framework. Latin America thus functions as a low-political-risk space where Ankara can test

functional relationships which, if necessary, can be scaled up to more sensitive areas without starting from scratch.

This logic is particularly relevant in contexts of sanctions, technological restrictions or political friction with traditional allies. The ability to maintain operational political and economic relations in regions far removed from the Euro-Atlantic environment increases Türkiye's strategic resilience and strengthens its negotiating capacity on other fronts. In this sense, strategic autonomy is not an abstract end in itself, but an enabling condition for gradual security projection.

1.2 Strategic conduct relevant to the Euro-Atlantic environment and a prelude to the defence sphere

In the field of European defence and foreign policy, Türkiye's actions in Latin America constitute a valuable source of analysis. This region functions as a testing ground in which Ankara implements its autonomy strategy under conditions characterised by controlled political and strategic risks. In this context, cooperation mechanisms, political discourses and forms of institutional presence are evaluated which, once consolidated, can be adapted to more complex and sensitive environments.

This pattern of behaviour has direct implications for European strategic planning. It is not a matter of anticipating a specific crisis or identifying an immediate threat, but rather of recognising a style of action that prioritises the gradual accumulation of influence, the normalisation of extra-regional presence and the filling of strategic vacuums. Where the European Union fails to define clear interests or reduces its presence due to institutional inertia, actors such as Türkiye find scope to position themselves discreetly yet effectively.

From this perspective, the analytical value of Latin America lies not only in its intrinsic worth, but in its function as a leading indicator. Observing how Ankara acts in the region allows us to anticipate future behaviour in other areas where European and Euro-Atlantic interests are more directly at stake. For a political-military decision-maker, this early observation is key: the most significant strategic processes are rarely announced; they are first tested on the periphery, and it is in that testing ground that their future viability is decided.

2 Latin America as an extra-regional testing ground

From a strictly strategic perspective, states do not test new behaviours in theatres where the cost of error is highest, international visibility is high, and the political or military consequences are difficult to contain. In this sense, Latin America possesses a unique combination of characteristics that make it a particularly functional environment for Türkiye's extra-regional projection.

Unlike Eastern Europe, the Middle East or the Caucasus, the Latin American region is not perceived as an area directly linked to Turkish national security or to the immediate balances of the Euro-Atlantic system. This distance is not only geographical, but also political and strategic. Latin America is not part of Türkiye's wider neighbourhood, is not integrated into its priority security frameworks, and does not directly influence its relationship with traditional allies. Precisely for this reason, the region offers an environment where Ankara can act with less exposure, less scrutiny and greater operational flexibility.

For an assertive middle power, this circumstance is not a limitation but an advantage. The absence of immediate vital interests reduces the cost of error and allows for experimentation without compromising critical strategic resources. Latin America thus becomes a space where it is possible to fine-tune instruments, sequences and narratives without provoking automatic defensive responses from dominant actors.

The primary function is controlled experimentation. Ankara uses the region as an environment where it can test, evaluate and refine its international behaviour under relatively safe conditions. This approach is not a matter of improvisation, but rather of strategic planning consistent with the recent trajectory of Turkish foreign policy.

In operational terms, Latin America allows Türkiye to gradually test various key dimensions of its international projection. Firstly, to test diplomatic instruments in unfamiliar cultural contexts, assessing their ability to adapt to diverse political systems and societies with different historical backgrounds. Secondly, to trial models of economic and technical cooperation with low financial commitment, which reduces entry costs and facilitates withdrawal if results are not as expected. Thirdly, it allows Türkiye to gradually introduce its offerings in sensitive areas such as security and defence, avoiding premature exposure. Finally, it enables

Türkiye to closely observe political, social and media reactions to its presence, both at national and regional levels.

From the perspective of a political-military decision-maker, this logic is particularly relevant because it demonstrates strategic intent without direct confrontation. This is not a series of isolated initiatives nor a reactive policy, but rather a pattern of behaviour consistent with Türkiye's actions in other parts of the Global South, particularly in sub-Saharan Africa and the Middle East (Altunışık, 2022). Latin America thus joins a tried-and-tested sequence, where the initial presence is discreet, the profile low, and learning takes priority over immediate results.

2.1 Low strategic density and high learning value

The appeal of Latin America as a testing ground can be explained, first and foremost, by its low strategic density in terms of direct competition between major powers in the security sphere. Although the United States maintains a historical dominance in the region, its strategic focus has gradually shifted towards the Asia-Pacific and Eastern Europe. This shift does not imply an abandonment of the Western Hemisphere, but rather a reduced willingness to react to developments that are not perceived as immediate or existential threats.

This relative withdrawal has created opportunities for extra-regional actors who do not seek to replace US hegemony, but rather to operate on the fringes of its strategic focus. For Türkiye, operating in these spaces allows it to engage in regional dynamics without triggering automatic containment mechanisms, to normalise its presence as a legitimate and non-disruptive actor, and to gain operational experience in fragmented, polarised political contexts characterised by high levels of institutional volatility.

The strategic value of this learning should not be underestimated. The lessons drawn from Latin America—regarding the management of complex political relations, cultural adaptation, the functioning of weak institutional systems, cooperation with governments of differing ideological persuasions, or the social acceptance of alternative security providers—are transferable. They can subsequently be applied in scenarios of greater strategic sensitivity, where the margins for error are narrower, but where prior experience proves decisive.

For a European or Euro-Atlantic decision-maker, this point is key: Latin America is not merely a peripheral theatre of operations, but a strategic laboratory. What Ankara learns there shapes its future behaviour in other theatres where European and Euro-Atlantic interests are more directly at stake.

2.2 Testing strategic autonomy outside the Euro-Atlantic perimeter

A second central element is that Latin America lies outside the institutional perimeter of the Euro-Atlantic environment. There are no shared security frameworks, formal collective defence commitments or political coordination mechanisms comparable to those existing in Europe. This absence of a rigid institutional architecture broadens the room for manoeuvre of extra-regional actors and reduces the political cost of behaviour which, within the NATO or European Union sphere, would generate immediate friction.

From this perspective, the region functions as a testing ground for Turkish strategic autonomy. Ankara can assess the extent to which it is capable of maintaining stable political relations without explicitly aligning itself with the West, cooperating with governments subject to international sanctions or external pressure, and offering alternative public goods—training, technical assistance, security cooperation—without explicit normative conditionality.

For a European decision-maker, this pattern should be interpreted as an early warning sign. Strategic autonomy is not built overnight, nor is it activated solely in crisis contexts. It is cultivated gradually in environments where political risk is limited and the costs of error are manageable. Latin America offers Türkiye an ideal space for such cultivation, allowing it to test the limits of its scope for action without directly compromising its core relationships.

This dynamic is particularly relevant in an international context marked by reciprocal sanctions, regulatory fragmentation and the growing politicisation of economic and technological interdependencies. The ability to operate outside the Euro-Atlantic perimeter strengthens Türkiye's strategic resilience and expands its negotiating capacity on other fronts, including those where security and defence are becoming increasingly important.

2.3 Progressive normalisation of extra-regional presence and groundwork for security

A third key aspect is the process of the progressive normalisation of Türkiye's presence in Latin America. Ankara does not present its regional involvement as exceptional or as an open challenge to the existing order. On the contrary, it frames its presence through discourses of cooperation, mutual respect and the diversification of alliances, avoiding narratives of confrontation, rigid ideological alignment or explicit ambitions for regional leadership.

This discursive strategy serves a clear operational function: it reduces initial resistance and facilitates the gradual acceptance of Türkiye as just another extra-regional actor. From a strategic perspective, normalisation acts as a multiplier of options. Once the Turkish presence is perceived as part of the usual diplomatic landscape, the political threshold for introducing new forms of cooperation is significantly lowered.

This point is particularly relevant in relation to security and defence. The prior acceptance of Türkiye as a political and economic partner facilitates, when the time comes, the introduction of initiatives in more sensitive areas without provoking automatic defensive reactions. The process is slow, incremental and cumulative, but it is precisely for this reason that it is effective. It is a low-profile, high-impact strategy in the medium term, characteristic of middle powers seeking to expand their scope for action without bearing the costs of direct confrontation.

In this sense, Latin America functions not only as an extra-regional testing ground, but also as a preparatory phase for a more ambitious security projection. Understanding this sequence is essential for any decision-maker who aspires to anticipate, rather than simply react to, developments in Turkish foreign policy.

3 Diplomacy of presence and political pre-positioning

Diplomacy constitutes the structural pillar of Türkiye's projection in Latin America. It does not act as a decorative instrument or as a mere ceremonial extension of bilateral relations, but as a carefully planned mechanism of political pre-positioning. Since the mid-2000s, Ankara has pursued a sustained strategy of diplomatic expansion that responds far more to a logic of long-term strategic planning than to immediate or short-term bilateral needs.

At the start of the 21st century, Türkiye's diplomatic presence in Latin America was limited, fragmented and, in many cases, symbolic. Two decades later, Türkiye maintains nineteen embassies (following the opening of its mission in Managua) in Latin America and the Caribbean, complemented by a growing network of honorary consulates and mechanisms for regular political dialogue (Ministry of Foreign Affairs of the Republic of Türkiye, 2025). This expansion is not the result of a one-off reaction to specific economic opportunities nor of an explicit demand from the host states. It is a deliberate, sequential and cumulative process, consistent with the logic of a middle power seeking to expand its international room for manoeuvre.

From a strategic perspective, Turkish diplomacy in the region fulfils a function comparable to that of an advanced infrastructure: it does not produce immediately visible effects, but it drastically reduces the costs of future action. A permanent diplomatic presence enables Ankara to stay informed, be recognised as a legitimate interlocutor, and have political channels at its disposal that can be activated in contexts of rapid change or regional crises.

3.1 Presence before necessity

From a decision-making perspective, opening embassies in countries where economic or security interests are modest is justified by a single clear rationale: being there before it becomes necessary to be there. Ankara invests in diplomatic infrastructure in the same way one pre-positions logistical capabilities, with the aim of reducing future response times and ensuring immediate political access in scenarios of political, economic or security transformation.

This diplomacy of presence fulfils several simultaneous strategic functions. Firstly, it guarantees permanent political channels with governments, parliaments and local administrative elites, regardless of internal political cycles. Secondly, it facilitates direct and continuous monitoring of internal and regional dynamics, avoiding exclusive reliance on third-party information. Thirdly, it allows for the rapid activation of economic, cultural or security initiatives when the context warrants it, without the need to build relationships from scratch.

This type of presence should be interpreted as latent capacity, not merely as symbolic representation. An embassy is not merely

a diplomatic point of contact, but a platform from which, when the time is right, more ambitious initiatives in sensitive areas can be launched. In this sense, Turkish diplomacy in Latin America acts as a forward strategic infrastructure, ready to be deployed when political conditions allow.

3.2 High-level diplomacy and strategic signalling

Presence diplomacy is reinforced by sustained high-level political activism. The official visits by President Recep Tayyip Erdoğan and key ministers to Latin American countries do not primarily seek to conclude major agreements or achieve immediate economic results. Their main function is to signal political commitment, raise the profile of the bilateral relationship and project strategic continuity.

This type of signalling serves a dual purpose. Externally, it projects the image of Türkiye as a global actor capable of operating in multiple regions simultaneously, reinforcing its narrative of strategic autonomy. Internally, it legitimises the policy of geographical diversification in the eyes of the Turkish public and political elites, presenting it as a natural extension of its international ambition.

From a strategic planning perspective, high-level political signalling is a low-cost instrument with high symbolic returns. It allows for the consolidation of nascent relationships, the overcoming of local bureaucratic resistance, and the conferral of political visibility on a presence that might otherwise be perceived as marginal. For a middle power, this type of diplomacy is particularly effective, as it maximises impact without requiring disproportionate material commitments.

3.3 Integration into regional multilateral frameworks

In parallel with its bilateral engagement, Türkiye has sought to integrate progressively into the main Latin American multilateral forums as an observer or external partner. Its presence in the Organisation of American States and its links with mechanisms such as MERCOSUR or the Community of Latin American and Caribbean States allow it to access spaces for political engagement, narrative-building and informal coordination (Tokatlían, 2024).

Although these forums do not confer direct decision-making power nor do they immediately influence major regional policy directions, they do fulfil a significant strategic function. They normalise Turkish participation in regional debates, facilitate regular contact with key actors, and allow Ankara to position itself as an extra-regional partner interested in the region's stability and development.

For a middle power with limited resources, access to these forums constitutes an efficient way of multiplying influence without bearing the costs of a dominant structural presence. Multilateral participation also reinforces the perception of legitimacy of Türkiye's actions, reducing suspicion and facilitating the subsequent deepening of bilateral relations.

3.4 Bilateral differentiation and operational flexibility

A distinctive feature of Turkish diplomacy in Latin America is its high capacity for bilateral differentiation. Ankara avoids uniform approaches and adapts its discourse, instruments and level of visibility according to the political, economic and strategic profile of each partner. This operational flexibility enables it to interact effectively with governments of different ideological persuasions and within highly diverse institutional contexts.

From a decision-maker's perspective, this approach reflects an operationally sophisticated diplomacy, capable of weighing risks and opportunities without compromising overall strategic coherence. The absence of rigid alignments and explicit normative constraints facilitates engagement with actors who maintain tense relations with the West, without forcing Ankara to adopt rigid ideological positions.

This flexibility does not imply a lack of strategic direction. On the contrary, it allows Türkiye to position itself as a pragmatic and functional actor, capable of offering cooperation tailored to the needs perceived by each partner. In the Latin American context, this capacity for adaptation constitutes a comparative advantage over actors with more rigid frameworks for action.

Taken together, diplomacy of presence and political pre-positioning form the basis upon which subsequent entry into more sensitive areas, including security and defence, is built. Understanding this sequence is essential to interpreting the logic of Türkiye's projection in Latin America: before acting, Ankara ensures it is

present; before escalating, it normalises relations; and before committing critical resources, it prepares the political ground.

4 Selective economic projection and covert strategic autonomy

From the perspective of a political-military decision-maker, the economic dimension of a state's external projection should not be assessed solely in terms of trade volume, direct investment or market share. What is truly relevant is its strategic function: what vulnerabilities it reduces, what options it opens up and what capabilities it enables in the medium and long term. In the case of Türkiye, economic activity in Latin America responds less to a logic of immediate profitability than to a deliberate strategy of diversification, resilience and building future options.

Trade between Türkiye and the region has grown steadily since the early 2000s, but remains modest compared to the flows maintained by actors such as the United States, China or the European Union (UNCTAD, 2022). This quantitative limitation should not be interpreted as a failure or a structural weakness. On the contrary, it reflects a conscious decision not to over-expose the economy in a geographically distant, politically heterogeneous environment subject to recurring cycles of instability.

From a strategic perspective, Ankara appears to have internalised the view that an excessively deep economic presence in Latin America would generate reciprocal dependencies that are difficult to manage and high political costs, should the international environment deteriorate. The chosen approach is different: a sufficient, but not dominant, presence that allows for the activation of alternative channels in times of tension without compromising critical resources or assuming disproportionate risks.

The logic guiding Türkiye's economic action is, therefore, selective and functional. Ankara prioritises sectors and countries where economic investment can generate indirect strategic returns, such as access to critical resources, a reduction in structural dependencies, regulatory learning, or the opening of alternative channels in scenarios involving sanctions or trade restrictions. From this perspective, Latin America offers clear advantages: a diversity of raw materials, varying regulatory frameworks, capacity for bilateral negotiation, and the absence of rigid alignments in foreign economic policy.

For a decision-maker, this pattern reveals an economic approach that seeks not regional leadership or trade volume, but strategic flexibility. The economy acts as a silent tool of autonomy, not as an instrument of visible power.

This growth trajectory reached unprecedented milestones between late 2024 and early 2025. During the G20 Summit in Rio de Janeiro in November 2024, Turkish diplomacy made significant progress by proposing the creation of a High-Level Cooperation Council with Brazil, consolidating its role not only as a trading partner but also as a strategic ally in the Global South (Government of Brazil, Planalto, 2024). This activism is underpinned by the strength of its defence industry, which in 2025 surpassed the historic threshold of ten billion USD in exports, with growing penetration into Latin American markets seeking technological alternatives outside the traditional orbit of the major powers.

4.1 Trade as a vehicle for diversification, not dependence

For an assertive middle power, trade is not an end in itself, but a tool for expanding international room for manoeuvre. In this sense, Türkiye does not seek to create deep economic dependencies in Latin America—which would entail significant financial, political and reputational commitments—but rather to maintain trade relations that are sufficiently close to be relevant in times of need.

This approach translates into a pragmatic trade policy, geared towards diversifying partners and reducing vulnerabilities to external shocks. The aim is not to replace traditional markets, but to complement them. In contexts of friction with allies or trade restrictions, the existence of functional relations in Latin America broadens the range of options available to Ankara.

Brazil and Mexico stand out as key partners within this strategy, not only because of the size of their economies, but also because of their position in global value chains. In the case of Brazil, its industrial weight and role in strategic sectors make it a relevant partner for any extra-regional actor. In the case of Mexico, its inclusion in the USMCA makes the country an indirect gateway to the North American market, a factor that Ankara is watching closely against a backdrop of increasingly transactional relations with Washington (ECLAC, 2021).

From a decision-making perspective, this type of economic positioning should be interpreted as a means of reducing future vulnerabilities, not as a bid for regional leadership or an attempt to challenge spaces dominated by major powers. The key is not volume, but the existence of channels that can be activated in adverse scenarios.

4.2 Critical resources and strategic foresight

An element of growing relevance within Türkiye's economic outlook is its interest in Latin American strategic resources linked to the energy and technological transition, particularly lithium. The so-called lithium triangle—Argentina, Bolivia and Chile—contains a substantial portion of the world's reserves of this mineral, which is essential not only for batteries and energy storage, but also for next-generation military systems and dual-use technologies (ECLAC, 2023).

Although Türkiye's presence in this sector is still in its infancy and lacks the depth achieved by other players, the mere active monitoring of these dynamics reveals a logic of strategic foresight. Ankara is aware that future strategic autonomy depends, to a large extent, on securing access to critical inputs, the availability of which will determine both economic competitiveness and defence capabilities.

From this perspective, Latin America is emerging as one of the regions where this competition will intensify over the coming decade. Turkish policy does not aim for direct control of resources, but rather for early positioning, the establishment of favourable political relations, and the acquisition of knowledge regarding regulatory frameworks and key actors. This type of approach is consistent with a low-profile strategy that prioritises learning and flexibility over the pursuit of immediate gains.

For a European decision-maker, this interest should be interpreted as an early warning sign, not as an immediate threat. Experience shows that critical supply chains cannot be improvised or secured in times of crisis; they are built through gradual positioning, sustained political relations and an early presence in the areas where the resource is concentrated.

Overall, Türkiye's economic reach in Latin America acts as a silent component of its strategic autonomy. It does not make headlines or immediately upset the balance of power, but it

contributes cumulatively to broadening Ankara's scope for action. Understanding this logic is essential to interpreting why, once these economic positions are consolidated, entering more sensitive areas—such as security and defence—becomes politically more viable and strategically less costly.

5 Soft power as preparation for the operational environment

In security analysis, soft power tends to be underestimated due to its intangible nature, the difficulty of measuring its immediate effects, and its usual association with cultural or symbolic spheres. However, from an operational perspective, soft power constitutes a central instrument for reducing friction and preparing the political and social environment prior to any more sensitive projection. In extra-regional contexts, where legitimacy and prior acceptance are critical factors, its strategic value is particularly high.

In Latin America, Türkiye has deployed a coherent set of soft power tools that fulfil this function with remarkable efficiency. These tools do not seek to transform deep-seated structures or generate cultural dependency on a large scale. Their objective is more limited and, precisely for that reason, more effective: to normalise the Turkish presence, reduce initial resistance and build an image of a cooperative, pragmatic and non-intrusive partner.

Institutions such as the Turkish Cooperation and Coordination Agency (TİKA) and the Yunus Emre Institute act as vectors of social and cultural presence, generating positive visibility at relatively low financial cost. Their projects in areas such as education, health, technical training and cultural cooperation do not seek structural impact or symbolic regional leadership. Rather, they seek sufficient political and social acceptance so that the Turkish presence is not perceived as alien or disruptive (Çolakoğlu, 2019).

From a decision-making perspective, what matters is not the scale of these programmes or their territorial coverage, but their enabling function. Where there is a positive perception of Türkiye as a cooperative, respectful and functional partner, the political threshold for accepting initiatives in more sensitive areas—particularly security and defence—is significantly lowered. Soft power thus acts as a preparatory phase, not as an end in itself.

This approach is consistent with the general low-profile strategy observed in Türkiye's engagement in Latin America. Ankara does

not seek cultural prominence or normative leadership. It seeks familiarity, predictability and a reduction in uncertainty. In operational terms, this amounts to preparing the ground before any escalation.

5.1 Educational diplomacy and the creation of elite networks

Educational diplomacy is one of the most effective—and least visible—instruments of Türkiye's soft power in Latin America. The Türkiye Scholarships programme is a clear example of strategic long-term investment. The training of Latin American students at Turkish universities does not seek immediate returns or measurable short-term results. Its aim is to create networks of affinity which, over time, can facilitate political, business, academic and technical dialogue (Aras and Mohammed, 2018).

From a strategic perspective, these networks operate as latent relational capital. They do not generate direct influence nor guarantee automatic alignments, but they do foster a favourable predisposition at key moments. Former students educated in Türkiye may become civil servants, advisers, academics or professionals with the capacity for informal influence. In such cases, prior familiarity reduces cognitive barriers and facilitates dialogue.

For a political-military decision-maker, this type of capital is particularly valuable in regions where the density of historical ties with Europe or the United States has progressively eroded. Where traditional points of reference lose their centrality, the existence of alternative networks, even if limited in number, takes on disproportionate weight. Educational diplomacy does not replace other instruments, but reinforces them when they are activated.

Academic training and educational exchange are unlikely to generate internal or external resistance, allowing them to be deployed even in highly politically sensitive contexts. From a strategic planning perspective, this is a long-term investment with minimal risks and high potential returns.

5.2 Audiovisual production and cultural normalisation

A second key vector of Turkish soft power in Latin America is the mass dissemination of audiovisual productions, particularly television series.

The widespread reception of Turkish audiovisual content has contributed significantly to the cultural normalisation of Türkiye in societies where its presence was historically marginal. Repeated exposure to Turkish narratives, settings and characters fosters familiarity, reduces cultural distance and constructs an image of hybrid modernity, situated between tradition and contemporaneity (Yörük and Vatikiotis, 2013).

From a security perspective, this normalisation acts as a political buffer. It reduces social resistance and facilitates the acceptance of Türkiye as a legitimate actor in spheres where, otherwise, its presence might be perceived as exogenous or intrusive. Cultural familiarity does not generate automatic support, but it does diminish initial rejection, which is critical in the early stages of extra-regional outreach.

For a decision-maker, this effect should not be dismissed as trivial. In environments where public opinion increasingly influences decision-making, prior cultural perceptions shape the scope for political action. Cultural normalisation makes it easier for initiatives in sensitive areas—such as security cooperation, military training or the provision of technology—to be presented as natural extensions of an existing relationship, rather than as ruptures.

Overall, Turkish soft power in Latin America fulfils a clearly operational function: it prepares the ground. It does not replace diplomacy or the economy, but complements them by reducing friction, fostering familiarity and politically enabling subsequent phases of external projection. In the strategic sequence observed, soft power acts as a silent prelude to entry into more sensitive areas, particularly security and defence.

6 Security and defence: gradual entry into a sensitive arena

The security and defence dimension constitutes the most significant leading indicator of Türkiye's strategic projection in Latin America. Unlike diplomacy, economic cooperation or soft power, entry into this sphere implies a qualitative leap, both due to its political sensitivity and its medium- and long-term strategic implications. Precisely for this reason, Ankara has adopted a gradual, selective and carefully calibrated approach, consistent with the logic of extra-regional testing outlined in the previous sections.

From a decision-making perspective, what matters most is not the current volume of defence cooperation—which remains limited—but

the direction of the movement and the way it is structured. Türkiye does not seek to establish a permanent military presence or formalised defence agreements with Latin American states. Its objective is to establish itself as a legitimate and functional provider in specific security niches, breaking historical monopolies and creating low-profile but long-term technical dependencies.

This approach follows a well-known logic in strategic planning: before aspiring to structural influence, it is necessary to normalise one's presence. In Latin America, Ankara has laid the groundwork through diplomacy, economics and soft power, so that its entry into the security sphere is not perceived as a rupture, but as a natural extension of existing relations.

6.1 The defence industry as a foreign policy instrument

The development of a competitive national defence industry has provided Türkiye with a particularly effective tool for projecting its influence abroad. Unlike the major traditional suppliers, Ankara can offer mid-range systems with proven effectiveness and low political conditionality, a combination that is especially attractive to states with limited budgets, immediate operational needs or difficulties in accessing established Western suppliers (SIPRI, 2022).

In the Latin American context, this offering is not geared towards large strategic platforms, but rather towards tactical and operational capabilities: surveillance, territorial control, border security, maritime control and support for internal security. These areas present two advantages from a strategic perspective. On the one hand, they respond to real and growing needs in many states across the region. On the other, they generate less political resistance than other, more visible forms of military cooperation.

For a political-military decision-maker, this pattern reveals a strategy of niche penetration. Türkiye does not compete head-on with the United States, Israel or, to a lesser extent, Russia and China in large weapons systems. It positions itself where demand is high, political sensitivity is lower and the capacity to build long-term relationships is greater.

6.2 Drones and surveillance systems: breaking exclusivity

The unmanned aerial systems developed by Turkish industry have become the main vehicle for the international visibility of

its defence sector. Their use in various conflict scenarios has cemented a reputation for operational effectiveness at relatively low cost. In Latin America, the appeal of these systems lies in border surveillance missions, maritime control, the fight against organised crime and support for internal security operations.

From a decision-making perspective, what matters is not the one-off acquisition of platforms, but the structural impact they have. The introduction of Turkish technology involves training, maintenance, limited interoperability and logistical dependence. These factors create technical and human ties that endure beyond the initial transaction.

Every exploratory agreement, every training programme or every technology demonstration helps to break down historical exclusivities in a market traditionally dominated by Western suppliers. It is not a question of replacing them, but of introducing alternatives. For an assertive middle power, this partial disruption is sufficient to expand its scope for action and strategic visibility.

However, this expansion is not without friction for European interests. The growing sale of unmanned systems (drones) and Turkish military technology in the region poses, from a European perspective, a potential challenge to the industrial and technological base of Spanish and European defence in historically friendly markets. Just as is observed in the Sahel, where Türkiye competes head-on with French influence, in Latin America Ankara is beginning to position itself as a supplier 'without political conditions', which could erode the EU's capacity for influence regarding security standards and military cooperation, displacing European companies from critical sectors of defence and border surveillance (Daily Sabah, 2026).

6.3 Cooperation on internal security and the grey zone

Another key aspect of Türkiye's presence in Latin America is its natural fit within the grey zone, particularly regarding internal security, territorial control and the management of non-conventional threats. Many Latin American states face persistent challenges related to organised crime, border control, illicit trafficking and institutional weakness. In this context, cooperation on internal security is politically more acceptable than traditional military cooperation.

Türkiye offers expertise, technology and training in areas that fall below the threshold of national defence but have a significant

impact on internal stability. From a strategic perspective, this approach is particularly effective: it allows for a presence in a sensitive sphere without triggering narratives of militarisation or external interference.

For a European or Euro-Atlantic decision-maker, this type of cooperation deserves special attention. The transfer of capabilities in the grey zone can alter internal balances, influence security doctrines and generate technical dependencies which, over time, also extend into the strictly military sphere.

In this context, the 'grey zone' is understood as the set of activities situated below the threshold of conventional armed conflict, but with cumulative strategic effects on security, governance and political alignment.

6.4 Strategic assessment for the Euro-Atlantic sphere

In terms of European defence and foreign policy, Türkiye's gradual integration into the Latin American security sphere does not represent an imminent threat, but it does constitute a significant strategic indicator. Analysis should focus less on current capabilities and more on understanding the sequence: political normalisation, economic empowerment, the reduction of cultural barriers, and eventual cooperation on security issues.

This pattern of action suggests that security and defence are not the starting point for Türkiye's engagement in Latin America, but rather its most sensitive and politically costly phase, activated only when the environment has been sufficiently prepared. From this perspective, a delayed reaction proves particularly ineffective.

For a political-military decision-maker, the key is not to block or confront this presence, but to monitor it systematically, assess its cumulative effects and, above all, identify the areas where the absence of a European initiative is creating opportunities for external actors. Experience shows that, in security matters, incremental processes are often more decisive than abrupt moves.

7 Venezuela as a testing ground under sanctions

The case of Venezuela occupies a unique place within Türkiye's strategy in Latin America and must be analysed without analytical ambiguities or diplomatic euphemisms. From a strictly strategic perspective, Venezuela is not a priority partner for Türkiye

in economic, political or regional security terms. It is, much more precisely, a testing ground that offers Ankara an exceptional environment in which to trial cooperation schemes under sanctions, gauge Western reactions and acquire transferable lessons.

The relationship between Ankara and Caracas has clearly intensified since 2018, against a backdrop marked by international sanctions, the diplomatic isolation of the Venezuelan regime and an urgent need to diversify external support. This context has remained remarkably stable in the years since, consolidating Venezuela as an exceptionally valuable operational environment for Türkiye: a state capable of offering cooperation, yet subject to severe external restrictions, where room for manoeuvre is limited and every interaction entails measurable reputational costs.

For Ankara, this scenario offers an ideal environment for testing cooperation under adverse conditions. It is not a relationship geared towards significant economic benefits or the construction of a classic strategic alliance. Its value lies in the possibility of experimenting, with controlled risks, in key areas such as non-conventional trade, the transfer of dual-use technologies, and the political and communicative management of cooperation with a sanctioned regime (Ellner, 2019). The extension of this relationship—now consolidated after several years of implementation—has allowed Ankara not only to test, but also to validate and refine these capabilities.

What matters is not what Türkiye gains from Venezuela, but what it learns in Venezuela. Ankara has acquired and consolidated operational experience in three critical areas. Firstly, operating under complex sanctions regimes, where financial, commercial and technological restrictions necessitate the design of alternative exchange mechanisms. Secondly, developing opaque yet functional cooperation schemes capable of sustaining bilateral relations without triggering automatic responses from Western actors. Thirdly, empirically assessing the political, diplomatic and media reactions of the United States, the European Union and other actors to indirect challenges to the sanction's regime.

This learning process has high strategic value because it is transferable. What has been tested and validated in Venezuela can be applied, with adjustments, in other scenarios where Türkiye experiences friction with the West or faces similar restrictions. Cooperation under sanctions is not a one-off anomaly, but a

strategic capability that Ankara has progressively incorporated into its toolkit.

From this perspective, Venezuela functions—or at least did so until 3 January 2026—as a testing ground. It allowed Türkiye to ascertain the extent to which it can maintain functional relations with isolated states, gauge the limits of Western tolerance, and adjust its behaviour to maximise benefits and minimise costs. The persistence of this scheme over several years demonstrates that cooperation under sanctions is sustainable, that the reputational costs are manageable, and that the lessons learnt are operationally valuable. Latin America, and Venezuela in particular, thus provide a space in which to test strategies that, if applied directly in regions of greater strategic sensitivity—such as Eastern Europe, the Middle East or the Mediterranean—would have far more serious and immediate consequences.

For the European or Euro-Atlantic sphere, this point is critical. The significance of the Venezuelan case lies not in its regional impact, but in its value as an already established operational precedent. Ignoring this dimension leads to an incomplete understanding of Turkish foreign policy. This is not a marginal or ideological relationship, but a deliberate exercise in strategic learning under extreme conditions that has proven to be successful and replicable.

In this sense, Venezuela should not be analysed as an exception, but as a laboratory whose lessons have already been internalised. Understanding what Ankara has tested and consolidated there allows us to anticipate how it might behave in other scenarios of tension, sanctions or indirect strategic competition. For those seeking to anticipate future dynamics, this learning is far more relevant than any quantitative indicator of trade or investment.

8 Extra-regional competition and comparative geopolitical analysis

Türkiye's engagement in Latin America cannot be understood in isolation or as a mere sum of disconnected bilateral initiatives. It is embedded in a densely populated geopolitical environment, in which actors with far superior structural capabilities in economic, military and regulatory terms operate. For Ankara, the region is neither a space for direct competition nor a theatre in which to aspire to dominant positions. Its logic is different: Latin America

functions as a stage for indirect competition, strategic signalling and the selective occupation of niches.

From a decision-making perspective, this nuance is essential. Türkiye does not seek to challenge hegemonic powers or abruptly alter existing regional balances. Its aim is to erode exclusivity, introduce alternatives and expand its international room for manoeuvre through a discreet but persistent presence. This behaviour reflects a logic typical of an assertive middle power: acting where major players do not consider it a priority to invest sustained political capital, but where gradual accumulation can generate appreciable strategic returns in the medium term.

In this context, Türkiye's conduct should not be assessed by its immediate impact, but by its cumulative effect. Every bilateral relationship, every sectoral initiative and every political gesture contributes to normalising Türkiye's presence as a legitimate extra-regional actor. This normalisation reduces future barriers to entry and broadens the options available to Ankara in scenarios of greater systemic tension.

8.1 The United States: diversification without direct confrontation

The United States maintains unquestionable structural primacy in Latin America, particularly in the military, financial and regulatory spheres. Its network of alliances, its capacity for projection and its institutional influence continue to be decisive in shaping the hemispheric order. However, the relative shift of its strategic focus towards the Asia-Pacific and Eastern Europe has reduced its direct involvement in numerous non-critical areas of the Western Hemisphere, creating partial vacuums of political attention.

Türkiye exploits this dynamic without seeking direct confrontation. Its presence in the region does not challenge the US hemispheric architecture nor does it openly question Washington's leadership. Instead, it introduces low-intensity friction in terms of political narrative, the provision of alternative suppliers, and relations with governments that are critical of or distant from the United States.

From a strategic perspective, Ankara reaps significant symbolic benefits. It projects the image of an autonomous actor, capable of operating outside the traditional perimeter of US influence, without bearing the costs of a direct confrontation. This strategic signalling is particularly effective because it occurs in an

environment where Washington prioritises other theatres and tends to tolerate dynamics it does not perceive as immediate threats (Tokatlian, 2024).

This behaviour should be interpreted as low-cost strategic signalling. It does not alter the regional *status quo* nor erode US primacy, but it does demonstrate Türkiye's capacity for extra-regional action and reinforces the Turkish narrative of strategic autonomy. In future scenarios of greater friction between Ankara and Washington, this prior experience broadens Türkiye's room for manoeuvre and reduces its dependence on a single framework of relations.

8.2 China: asymmetric competition and tactical complementarity

China is the dominant extra-regional economic actor in Latin America. Its volume of trade, direct investment, financing and infrastructure far exceeds that of any other non-Western actor, and its presence has become a structural feature of the regional landscape (ECLAC, 2021). Faced with this reality, Türkiye does not compete on the same scale nor does it aspire to replicate the Chinese model of massive economic penetration.

The Turkish strategy is based on operational flexibility. Ankara occupies spaces where the Chinese presence generates political, social or regulatory resistance, offering cooperation on a smaller scale, with faster implementation and lower geopolitical visibility. This approach is attractive to states interested in diversifying their partners without bearing the political costs associated with excessive dependence on Beijing.

In certain contexts, the relationship between Türkiye and China even takes the form of tactical complementarity. Ankara can benefit indirectly from Chinese projects by positioning itself in later phases, auxiliary sectors or areas where the Chinese presence is insufficient or controversial. This strategy allows Türkiye to insert itself into regional economic dynamics without exposing itself to direct competition with an actor of vastly superior capabilities.

From a decision-making perspective, Türkiye should not be interpreted as a rival to China in Latin America, but rather as an opportunistic actor that benefits from Chinese saturation and the tensions this generates. This capacity for adaptation reinforces its profile as a pragmatic middle power, capable of operating in environments dominated by major actors without being subsumed by them.

8.3 Russia and Israel: security, defence and narrative

In the field of security and defence, competition takes on a more direct character. Russia maintains a long-standing presence in sectors such as defence, energy and technical-military cooperation, particularly with states seeking to counterbalance the West. Israel, for its part, retains a solid position as a military technology supplier, with an established reputation for advanced systems and high value-added solutions.

Türkiye is entering this space through a differentiated strategy. It does not compete by offering superior systems or cutting-edge technologies comparable to those of Israel, nor does it seek to replicate the depth of Russian cooperation. Its offering focuses on adequate, tried-and-tested solutions, with lower political and financial costs, and with reduced conditionality (SIPRI, 2022). This positioning is attractive to states that prioritise functionality and speed over extreme technological sophistication.

Furthermore, Ankara uses political narrative as an element of symbolic differentiation. Its pro-Palestinian stance allows it to connect with sensibilities present in broad sectors of Latin American public opinion, setting itself apart from Israel and reinforcing its image as an actor aligned with causes perceived as legitimate in the Global South (Levaggi, 2016; Youngs, 2017; Biscop, 2021). Although this narrative dimension does not automatically translate into procurement decisions or strategic alignments, it does influence public perception and the political legitimacy of cooperation.

From a structural perspective, this competition remains limited. However, its significance should not be underestimated. In contexts where public opinion and political legitimacy increasingly shape security decisions, the combination of a functional offering and a coherent political narrative gives Türkiye a specific comparative advantage, particularly in specific niches of the defence market.

Overall, a comparative geopolitical analysis shows that Türkiye's projection in Latin America is not based on direct confrontation with major actors, but on the exploitation of intermediate spaces. Ankara acts where others do not prioritise, adapts to existing constraints and turns its status as a middle power into an operational strength. For a political-military decision-maker, understanding this logic is essential to anticipate the future evolution

of Türkiye's presence, not only in Latin America but also in other extra-regional scenarios where this strategy may be replicated with similar cumulative effects.

9 Strategic implications for Spain and the European Union

Türkiye's growing influence in Latin America raises distinct yet closely interlinked strategic implications for Spain and the European Union. This is not an immediate threat nor a direct challenge to vital interests, but rather a dynamic of gradual erosion of spheres of influence, visibility and capacity for initiative in a region where Europe, and Spain in particular, had operated for decades with a relatively unquestioned sense of centrality (Levaggi, 2016).

For Spain, Latin America remains a priority area from a historical, cultural, business and diplomatic perspective. However, that centrality is no longer exclusive or automatic. The emergence of more agile, pragmatic and less norm-bound extra-regional actors has altered the balance of presence and perception. In this context, Türkiye's expansion should not be interpreted as an attempt at direct replacement, but rather as a gradual occupation of spaces where Spanish and European initiative has diminished due to strategic inertia (Youngs, 2017; Biscop, 2021).

From a decision-making perspective, the main risk for Spain is not losing established positions, but failing to be present where the environment is changing. Ankara acts with flexibility, pragmatism and minimal conditionality, whilst Spanish—and, by extension, European—action tends to be more institutionalised, more subject to procedures and less oriented towards active political signalling. This asymmetry does not stem from structural inferiority, but from a difference in strategic approach.

For a Spanish decision-maker, this situation raises three key implications. Firstly, a relative loss of initiative. Where Spain fails to clearly define its strategic interests or reduces its involvement to inherited formulas, other actors introduce functional alternatives. This is not a matter of direct competition, but of the silent replacement of an effective presence. Secondly, growing competition in terms of political visibility. Turkish diplomacy, which is more active and personalised, contrasts with a Spanish presence that is sometimes perceived as stable but less dynamic. Thirdly, cumulative risks in the field of security and defence. The entry

of alternative providers may, in the medium term, affect interoperability, training schemes and the strategic alignment of Latin American armed forces traditionally close to Europe.

Spain need not react in a confrontational manner or overestimate the Turkish presence, but it does need to regain strategic initiative, especially in areas where it has clear comparative advantages: security cooperation, training of civilian and military personnel, high-level political dialogue and the articulation of European positions in the region. Strategic passivity is, in this context, more costly than competition.

For the European Union, the implications are of a more structural nature. The main problem is not Türkiye's actions, but the absence of a coherent and sustained European strategy towards Latin America. For years, the region has been treated primarily as an area of regulatory affinity, development cooperation and political dialogue, rather than as an arena of strategic competition in the full sense of the term. This approach has limited Europe's ability to act swiftly and flexibly in an increasingly contested environment.

Türkiye exploits this vacuum with a low-profile yet highly purposeful policy. Where the European Union offers normative frameworks, Ankara offers a presence. Where the EU prioritises lengthy processes and conditionality, Türkiye prioritises direct relations and operational solutions. This methodological difference does not imply Turkish superiority, but it does confer a comparative advantage in certain contexts, particularly in states seeking to diversify their partners without fully aligning with any one of them.

From a Euro-Atlantic perspective, the concern is not immediate, but cumulative. The gradual erosion of European regulatory exclusivity, the introduction of security providers with different standards, and the normalisation of cooperation with actors subject to sanctions constitute dynamics which, taken together, may alter the regional strategic ecosystem. Not abruptly, but in a sustained manner.

In this context, Spain finds itself in a unique position. It can act as a bridge between Latin America and the European Union, contributing regional knowledge, political networks and the capacity for dialogue (Malamud and Núñez Castellano, 2025). But to do so, it needs a clear strategic vision backed at European level. Without an EU capable of defining interests and priorities in the region, Spain's capacity to influence will be progressively limited.

The conclusion is clear: strategic spaces that are not occupied do not remain empty. The answer does not lie in confrontation with Türkiye or in overreaction, but in regaining the initiative, adapting instruments and accepting that Latin America is no longer a space of passive influence, but a theatre of low-intensity strategic competition. Anticipating this dynamic is far less costly than reacting once it is fully established.

10 Medium-term scenarios (2025–2035)

Türkiye's projection in Latin America should not be analysed in binary terms—success or failure, threat or irrelevance—but as an open-ended process, shaped by internal Turkish factors, regional Latin American dynamics, and the evolution of the international environment. From a decision-making perspective, it is more useful to work with plausible scenarios that allow us to anticipate trajectories and calibrate proportionate responses.

Below are three reasonable medium-term scenarios, listed in order of increasing probability, not desirability.

10.1 Scenario 1. Low-profile continuity and quiet accumulation (most likely scenario)

In this scenario, Türkiye maintains its current pattern of action in Latin America: sustained diplomatic presence, selective economic cooperation, limited deployment of soft power, and very gradual penetration into low-intensity security spheres. There are no qualitative leaps or disruptive initiatives, but rather a progressive accumulation of relationships, experience, and political capital.

The region continues to function as a space for extra-regional testing and operational learning. Ankara consolidates its position as a legitimate extra-regional actor, without provoking significant defensive responses from the United States, Spain or the European Union. Defence cooperation remains at exploratory levels and focused on specific niches (Öniş and Kutlay, 2017; Altunışık, 2019).

This scenario entails limited risk in the short term, but cumulative costs in the medium term. The gradual normalisation of the Turkish presence reduces European exclusivity, particularly in areas such as training, the provision of security capabilities and political dialogue.

10.2 Scenario 2. Selective escalation against a backdrop of heightened systemic confrontation (plausible scenario)

In this scenario, a significant deterioration in relations between Türkiye and its Western allies—resulting from sanctions, regional crises or strategic differences—prompts Ankara to step up its extra-regional projection. Latin America then acquires enhanced strategic value as an area for political, economic and security diversification.

Defence cooperation is expanding, particularly in the areas of surveillance, internal security and dual-use technologies. High-level political contacts are intensifying and cooperation frameworks are being strengthened with states keen to diversify their alliances. The Venezuelan case is no longer an exception and has become an operational benchmark, although not necessarily replicated directly (Biscop, 2021; Webber, 2023).

For Spain and the European Union, this scenario demands a coordinated strategic response. Not so much to counter Türkiye, but to prevent an accelerated loss of influence in sensitive areas such as interoperability, security standards and political alignment. A failure to react in this scenario would have structural consequences.

10.3 Scenario 3. Tactical withdrawal whilst maintaining latent capabilities (least likely scenario)

In this scenario, internal factors—economic crisis, a realignment of strategic priorities or political changes in Ankara—lead to a tactical withdrawal of the Turkish presence in Latin America. The intensity of diplomatic and economic activity is reduced and initiatives in sensitive areas such as security are put on hold.

However, the infrastructure created does not disappear. Embassies, political channels, educational networks and relational capital remain. Latin America ceases to be a priority, but can still be activated in the future if conditions change. The withdrawal is operational, not structural (Youngs, 2017).

For European decision-makers, this situation represents an opportunity to regain the initiative, although it should not be viewed as a definitive withdrawal.

11 Final considerations

The three scenarios share a common element: the Turkish presence in Latin America is not a temporary phenomenon. It varies in intensity, but not in logic. Ankara has incorporated the region into its strategic toolkit as a space for diversification, learning and signalling autonomy.

For Spain and the European Union, the challenge lies not in reacting to a specific actor, but in redefining their own strategic relationship with Latin America. Where Europe acts with clarity of interests, coherence of instruments and proactivity, the capacity of external actors to occupy spaces will be limited. Where inertia persists, others will continue to advance.

From a decision-making perspective, the conclusion is unequivocal: anticipation is less costly than correction. Latin America is no longer a space of passive affinity, but a theatre of low-intensity strategic competition. Understanding how and why Türkiye operates in the region offers useful insights not only for this specific case, but also for anticipating similar dynamics involving other middle powers in an increasingly fragmented international system.

Conclusions

Türkiye's projection in Latin America is neither a temporary phenomenon nor a haphazard collection of diplomatic, economic or cultural initiatives. It responds to a coherent strategic logic, characteristic of an assertive middle power that has recognised that its international room for manoeuvre depends less on the scale of its resources than on its ability to operate in the interstices of the international system.

For Ankara, Latin America is neither a priority theatre nor an end in itself. It is a functional space: for testing, learning and the incremental accumulation of strategic options. Precisely because of its low strategic density, the absence of formal security commitments with the Euro-Atlantic environment, and the relative neglect by major players, the region offers Türkiye an ideal environment for practising strategic autonomy with controlled risks.

The sequence observed seems clear. First, diplomatic presence and political normalisation. Next, selective economic integration and the building of options. Then, the deployment of soft power

to reduce social and cultural friction. Only then, a gradual and cautious entry into sensitive areas such as security and defence. There is no improvisation: there is method.

From a security perspective, the most significant factor is not the current scale of Türkiye's presence, but its cumulative and transferable nature. What Ankara is testing in Latin America—operating under sanctions, diversifying suppliers, introducing low-profile defence technology, managing reputational costs—can be replicated, with adjustments, in other scenarios of greater strategic sensitivity. The Venezuelan case is particularly revealing in this regard: not as a model, but as a testing ground.

For Spain and the European Union, the main risk is not a direct replacement of their influence, but a silent erosion of strategic initiative. Where Europe acts with inertia, excessive proceduralism or a lack of clear priorities, actors such as Türkiye find room to position themselves. Not because they are stronger, but because they are more agile and less constrained by rigid regulatory frameworks.

The answer does not lie in confrontation or in overreacting to a presence that, in quantitative terms, remains limited. It lies in regaining the initiative, clearly defining interests and adapting instruments to an environment of low-intensity strategic competition. In this context, Spain has clear comparative advantages—regional knowledge, political networks, historical legitimacy—but it will only be able to exploit them fully if they are integrated into a more coherent European strategy towards Latin America.

The underlying strategic lesson is clear and applicable: unoccupied spaces do not remain empty. In a fragmented international system, ambitious and methodical middle powers tend to advance where major actors do not consider it a priority to invest sustained attention. Ignoring these dynamics by considering them secondary is, in the medium term, more costly than anticipating them.

Ultimately, Türkiye's projection in Latin America should not be read as an immediate threat, but as an early indicator of how middle powers operate in the new international environment. What is tested in areas of low strategic density ends up being applied in critical theatres. Understanding this logic today is less costly than reacting tomorrow, once it has already taken hold.

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Chapter Ten

Türkiye's geoeconomics in the Indo-Pacific

Ángel Rodríguez García-Brazales

Abstract

This chapter analyses Türkiye's geoeconomic projection in the Indo-Pacific through the Asia Anew initiative, designed to diversify trading partners and reduce structural dependence on Europe. The text examines Türkiye's macroeconomic evolution and its growing integration into Asian markets, marked by persistent trade deficits, but also by strategic opportunities. Three main areas are studied: the Western Pacific, focusing on the asymmetrical relationship with China and 'high-quality' partnerships with Japan and South Korea; Southeast Asia, particularly Indonesia and Malaysia; and the delicate balance on the Indian subcontinent, where Ankara combines historical alliances with Pakistan, economic pragmatism with India, and emerging opportunities in Bangladesh. The analysis concludes that Türkiye is deploying a flexible and differentiated strategy to position itself as a key player between Asia and Europe.

Keywords

Asia Anew, Geoeconomics, Indo-Pacific, Turkish foreign policy.

General introduction: the Turkish Asia Anew strategy

The growing importance of the Indo-Pacific in the global economy is prompting middle powers such as Türkiye to refocus their political, diplomatic and economic efforts on the region. This region already accounts for over 60% of global GDP and 65% of the world's population. The rapid growth of the Indian economy and that of some ASEAN countries suggests that this dominant position will not only be consolidated in the coming decades but is likely to expand. For this reason, like Türkiye, major emerging economies outside the region such as Brazil, South Africa and Egypt are gearing their economic strategies towards deepening their trade and investment relations with the new centres of global economic power.

Under the Asia Anew strategic initiative, Turkish foreign policy has embarked on a geopolitical and economic pivot towards the Indo-Pacific. The programme encompasses not only traditional economic diplomacy involving trade and investment agreements, but also includes logistical connectivity, technological cooperation, and cultural and educational relations. Türkiye aims to capitalise on the country's geographical advantages as a bridge between Asia and Europe, as well as the cultural advantages derived from sharing a moderate vision of Islam. As with other emerging powers, the strategy is not monolithic, but rather a sophisticated exercise in diplomatic calibration that adapts its approach to the realities of the various sub-regions without undermining relations with the traditional powers of the West.

This chapter analyses the development of this strategy through a detailed examination of Türkiye's relations in the three major regions of the Indo-Pacific. First, a brief introduction will be provided to Türkiye's macroeconomic performance over the last twenty-five years, with particular emphasis on trade and investment relations with Asia. This analysis complements that presented in the chapter of this volume dedicated to Türkiye's relations with Europe and Central Asia¹. The second section will assess relations with the Asia-Pacific axis, breaking down partnerships and agreements with the economic powers of China, Japan and South Korea. Thirdly, Türkiye's rapprochement with ASEAN will

¹ This chapter explains Turkish industrial policy under the various governments since President Recep Tayyip Erdoğan came to power in 2003 as prime minister and subsequently as president of the republic.

be explored, focusing on strategic synergies with Indonesia and Malaysia. Finally, the complex balance that Ankara must manage in the Indian subcontinent will be analysed, distinguishing its policy towards the two predominantly Muslim countries, Pakistan and Bangladesh, from that towards India.

1 Macroeconomic performance and openness
to the outside world, 2000–2024

1.1 Brief overview of the evolution of the Turkish economy

Like most emerging economies, Türkiye has experienced higher rates of economic growth than advanced economies, albeit with greater volatility. On average, between 1989 and 2024, real GDP expressed in 2015 USD has grown by more than 4% annually. Per capita income, expressed in the same terms, has increased 2.39-fold since 2000; although this is far from China’s spectacular growth (which increased five-fold over the same period), it is significantly higher than the 1.4-fold increase seen in the European Union and the US.

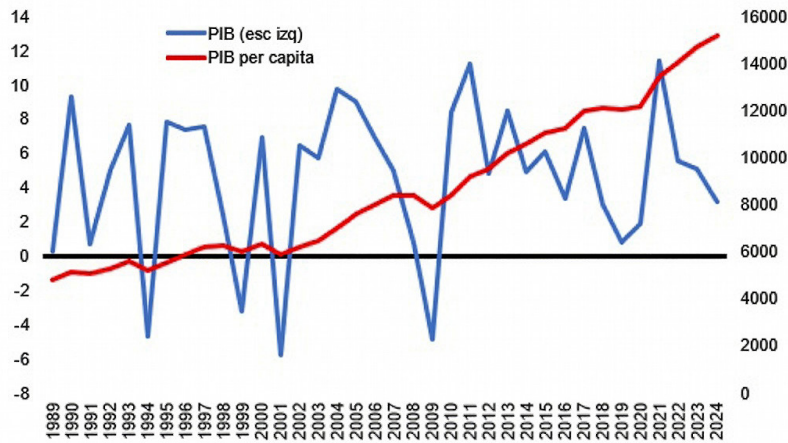


Figure 1. GDP growth and per capita income in % and in 2015 USD, respectively. Source: World Bank

This rapid growth has not been without significant volatility, partly due to global economic factors (the Great Recession of 2009, COVID), and partly caused by erratic and highly inflationary macroeconomic policies in recent years. Despite this,

and partly as a result of the industrial policy promoted since President Erdogan came to power, the economy has managed to maintain remarkable dynamism with uninterrupted positive growth rates over the last fifteen years, since the Great Recession. Also noteworthy is the average annual growth rate of over 5.5% during this period, which is high given that the average global economic growth rate stands at around 3%. This also explains the strong performance of per capita income, given the country's extraordinary demographic dynamism: its population has increased by twenty million people from 2000 to 2024 (from 65 to 85 million).

1.2 Opening up to the outside world as a central development strategy

The Turkish economy has undergone an accelerated process of internationalisation, enabling it to increase its exposure to foreign trade from 30% in 2000 to 55% in 2023 (see Figure 2). Most of this increase has come from trade with Europe and Central Asia (11 percentage points of GDP), whilst trade with the Pacific region has risen by only six percentage points over the same period. However, despite its small share of GDP, this trade runs a significant deficit for Türkiye. This is one of the reasons why it launched the Asia Anew initiative in 2019.

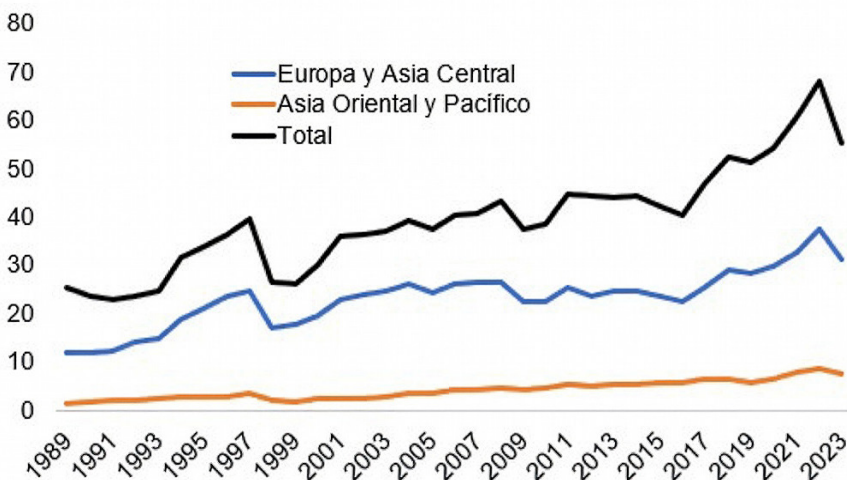


Figure 2. Türkiye's openness ratio (Exports + Imports)/GDP.
Source: UNCTAD

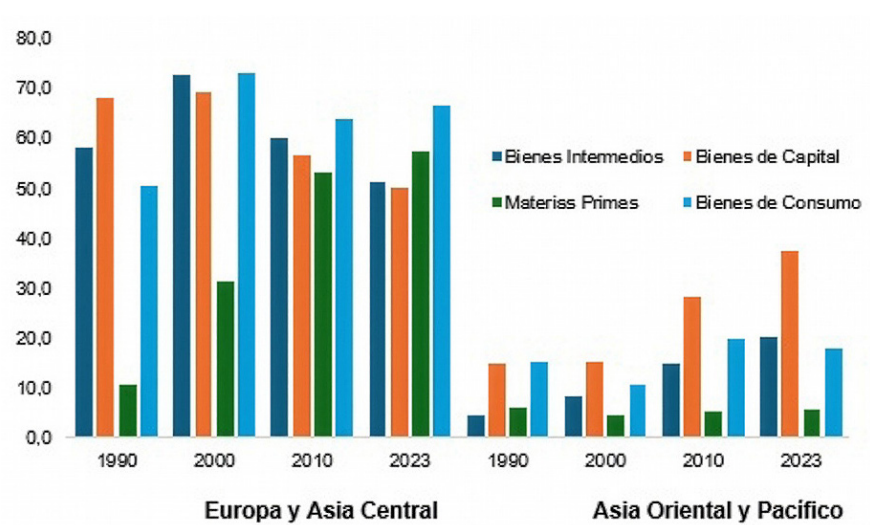


Figure 3. Türkiye's imports by commodity category as a percentage of total imports in that category. Source: UNCTAD

By sector, Türkiye remains heavily reliant on Europe for capital goods and on Central Asia for hydrocarbon imports. However, there has been a gradual increase in reliance on capital goods produced in the Asia-Pacific region, which almost exactly mirrors the decline in imports from Europe. This clearly points to a shift in the behaviour of Turkish firms regarding the acquisition of production equipment, a shift that mirrors that occurring in the rest of the world due to the increased competitiveness of Chinese firms in this and other sectors.

2024	Imports		Exports
China	44,928	China	3388
Korea	9246	India	1517
India	7021	Singapore	1085
Malaysia	4669	Korea	971
Vietnam	2976	Pakistan	918
Indonesia	2435	Japan	717

Table 1. Foreign trade with the Indo-Pacific. Main trading partners. Millions of USD. Source: UNCTAD

Table 1 shows the value of Türkiye's imports and exports with its main trading partners in the region. In all cases, there is a

trade deficit. Although this is a worrying situation from a financial perspective for the country, it is in fact a result of its strong economic and demographic dynamism. The Asia Anew strategy is, ultimately, an attempt by Turkish economic diplomacy to rebalance relations with these countries.

2 The Asia-Pacific axis: managing three partnership models

The economic region comprising China, Japan and South Korea represents the epicentre of global economic power, against which Türkiye has sought to establish three distinct partnership models that Ankara must manage simultaneously. Türkiye runs trade deficits with all three countries, which it is attempting to reduce through the Asia Anew initiative, but which require very different strategies in each case.

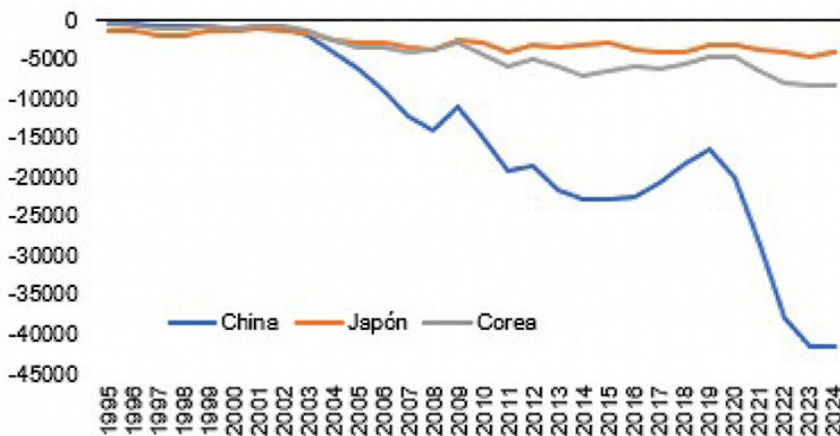


Gráfico 4. Saldo de la balanza comercial de mercancías. En millones de USD

Fuente: UNCTAD

Figure 4. Balance of trade in goods. In millions of USD. Source: UNCTAD

As can be seen in the chart, the main problem for Türkiye in its relationship with China is a goods trade deficit of around USD 41 billion, representing almost 80% of the aggregate balance (in 2024, it recorded an aggregate deficit of around USD 56 billion). The deterioration in the relationship has accelerated since China joined the World Trade Organisation in 2000, a pattern similar

to that observed in other economies worldwide and which is due more to China's economic performance than to other factors. However, it is worth noting that a deterioration in relations with the rest of the region is also evident, more pronounced in the case of South Korea than in that of Japan.

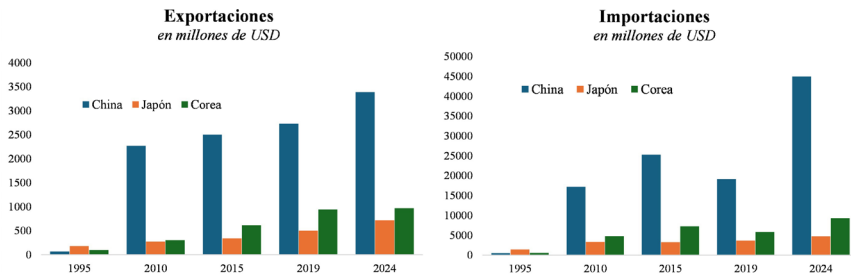


Figure 5. Trade with the Pacific region. Source: UNCTAD

Türkiye is a net recipient of investment from the three Asian countries, although this is far below the inflows from the European Union. According to the IMF, the cumulative investment from the three countries under the heading of foreign direct investment barely reaches 10 billion USD, which contrasts with the more than 121 billion invested from Europe². Generally speaking, they focus on sectors of mutual interest to the countries, although with a greater emphasis on cooperation in the case of Japan and Korea. It has also been suggested that these investments serve as a gateway for Asian multinationals to markets in Africa and the Middle East (Acar, 2015 and Manouni, 2025). This may well be the case, but the relatively small cumulative volumes and the purpose of the investments (in many cases local infrastructure) suggest that, if anything, this must be a very long-term objective and one that is highly dependent on the profitability and viability of projects on Turkish soil.

2.1 China: an asymmetrical relationship

As is the case with any country in the world, Türkiye's relationship with China is defined by the sheer size of the Asian giant and, consequently, by its asymmetry. The volume of China's trade with the rest of the world is immense, and is

² See: [https://data.imf.org/en/Data-Explorer?datasetUrn=IMF.STA:DIP\(12.0.1\)](https://data.imf.org/en/Data-Explorer?datasetUrn=IMF.STA:DIP(12.0.1))

generally accompanied by a structural imbalance (with almost every country in the world) that shapes bilateral dynamics. For China, Türkiye is more than just an attractive market for its exports: it is an indispensable geographical hub for connecting with Europe via the Belt and Road Initiative. For Türkiye, China serves as a counterweight to diversify its external alliances and mitigate its economic dependence on its main partner, the European Union.

Both countries established diplomatic relations in 1971 and, since then, have maintained a delicate balance between tensions over the Uyghur issue and mutual geoeconomic interests. In recent years, pragmatism appears to be prevailing, with the signing in 2010 of the 'strategic cooperation' agreement, formal alignment with the Silk Road Initiative in 2015, and the creation of the Turkish 'Middle Corridor' during the G20 summit in Antalya. In 2025, Türkiye participated as a guest at the Shanghai Cooperation Organisation (SCO) Summit in Tianjin. Finally, in 2026, the year marking the 55th anniversary of the establishment of diplomatic relations, collaboration is very likely to be strengthened with the signing of new investment projects.

The breakdown of the bilateral trade balance by product reflects the economic asymmetry between the two countries. In 2024, Türkiye exported minerals and chemical products³ to China worth around one billion seven hundred million USD, representing approximately 50% of total exports. Imports consist mainly of mechanical, electrical and electronic machinery worth twenty billion USD, which account for just under 50% of the total. The imbalance is explained by the high value added of imports—which consist of telecommunications equipment, data processing machinery and electronic products—and the low value added of Turkish exports to the Asian giant: marble and minerals such as chromium and copper. China's growth pattern explains this imbalance and is not an anomaly in its relations with most countries in the world. Its economic model is geared towards the export of goods, semi-finished products and components of increasing technological complexity.

The investments made by the Asian giant in Türkiye are not comparable to the volume of trade. IMF data shows total Foreign

³ Unless otherwise stated, bilateral trade data by product are taken from the Observatory of Economic Complexity. In turn, the observatory compiles its data from UNCTAD figures.

Direct Investment (FDI) in 2025⁴ at just over three billion USD. Under the umbrella of the Belt and Road Initiative, the amounts invested would have reached six billion USD⁵, a relatively small figure compared to China's global investment of USD 1.36 trillion. To this must be added a currency swap by the People's Bank of China worth six billion USD. This figure also fails to meet the country's financial needs to cover its substantial external deficits.

Apart from mitigating this imbalance by promoting exports and attracting tourism, Türkiye has an important trump card to play in this highly lopsided relationship: its geographical position.

The Russian invasion of Ukraine has significantly reduced the volume of goods transported via the Eurasian Land Bridge, which connects China and Europe by rail via Russia. According to data from the Eurasian Rail Alliance Index, the volume of traffic between Germany and China on this route has fallen by 90% between 2021 and 2025⁶. The Maritime Silk Road has also been affected by Houthi attacks on cargo ships entering the Suez Canal via the Bab-el-Mandeb Strait. The diplomatic pressure being exerted by the United States on Iran and the potential disruptions that a conflict between the two countries could cause to maritime shipping are likely also being factored into the calculations of Chinese logistics operators. In this geopolitical context, the so-called Middle Corridor (Trans-Caspian East-West-Central Corridor) takes on strategic importance for Beijing. For Türkiye, this connection offers a dual advantage: apart from infrastructure improvements driven by anticipated Chinese investment, the corridor connects with China via Georgia, Azerbaijan and Kazakhstan. This would allow Ankara to strengthen ties and relations with two important countries within the Organisation of Turkic States. Although there are no official figures on traffic volumes through the corridor, Azerbaijani sources indicate that in 2024 traffic volumes

⁴ FDI refers to investments that result in a controlling stake of more than 10% in the entity in which the investment is made. See: [https://data.imf.org/en/Data-Explorer?datasetUrn=IMF.STA:DIP\(12.0.1\)](https://data.imf.org/en/Data-Explorer?datasetUrn=IMF.STA:DIP(12.0.1)). This does not include loans, which are the preferred instrument for Chinese investment under the umbrella of the Belt and Road Initiative.

⁵ See: <https://www.invest.gov.tr/en/news/news-from-turkey/pages/turkiye-china-strengthen-historic-ties-future-economic-growth-cisce-2024.aspx>

⁶ See: <https://index1520.com/en/statistics/?view=list§ion=route&departure=CN&destination=DE&period=2025&previousPeriod=2021&level=2&orderField=previousPeriodTeu&orderDirection=desc>

increased by 64% and are expected to reach ten million tonnes by 2027⁷.

This relationship is not new. In 2015, a consortium of Chinese companies took a 65% stake in the port of Kumport (Istanbul)⁸. The high-speed rail section between Ankara and Kars, near the border with Armenia and Georgia, is currently under construction. This project reinforces Kars' existing role as a regional logistics hub connecting to the South Caucasus. The fact that Türkiye was the first destination for Chinese high-speed rail technology outside its borders (the Ankara–Istanbul line) was not merely an economic project: it brought Chinese technical standards to the doorstep of the EU.

Although the cumulative investment of USD 5.11 billion may seem marginal given the scale of Chinese commercial operations, its concentration in sectors of strategic importance to Ankara creates some critical dependencies. Huawei has penetrated the core of Türkiye's networks. Agreements with Turkcell, Vodafone and Türk Telekom for the All-Cloud Core and 5G systems position the Chinese tech firm as the 'guardian' of Turkish data. This could have long-term implications for national cybersecurity, particularly as Türkiye is a NATO member.

Ankara applies a strict diversification mandate. It has allowed China to lead the Hunutlu Thermal Power Plant (fossil fuel), but for large-scale renewable projects (>1 GW), it systematically favours European consortia. This approach seeks to prevent the national electricity system from becoming a lever for political pressure for Beijing (Siccardi, 2024).

Ultimately, the asymmetrical economic relationship between Türkiye and China must be contextualised within the framework of strategic cooperation under the Belt and Road Initiative. From a geoeconomic perspective, this relationship is approached by both sides with pragmatism and mutual benefit in mind. However, Ankara must simultaneously balance several aspects that lie beyond the economic sphere: from respecting Chinese

⁷ See: <https://www.newsilkroaddiscovery.com/transit-through-middle-corridor-to-grow-3-4-times/#:~:text=Growth%20is%20expected%20to%20reach,million%20tonnes%20will%20be%20oil.>

⁸ See: <https://www.invest.gov.tr/en/news/news-from-turkey/pages/280915-cosco-pacific-buys-turkish-kumport.aspx#:~:text=Chinese%20consortium%20buys%20into%20Turkish,the%20ancient%20'Silk%20Road'.>

sovereignty in the ethnic conflict with the Uighurs, to managing the cybersecurity risks associated with its technological cooperation with Beijing whilst being a member of NATO.

2.2 Japan: the high-quality partnership

The partnership with Japan is characterised by higher-quality investment and a high degree of strategic trust between two US allies. Bilateral trade in goods shows a deficit of just over four billion USD, due primarily to low Turkish exports and the high value-added nature of imports from Japan. By product, the largest exports are pasta, fish fillets and ferroalloys, none of which exceed USD 80 million in value. The main imports are cars (over USD 462 million), parts and accessories for motor vehicles, and large construction vehicles, which exceed USD 300 million in both categories. In part, this reflects a normal relationship between an advanced economy and a burgeoning emerging economy that needs to expand its *stock* of productive capital to sustain high economic growth. And the trade imbalance, whilst significant, is far from being as worrying as that with China.

Japanese international investment and cooperation is a global benchmark for its quality and long-term impact (OECD, 2020), and the case of Türkiye is no exception. The Japan International Cooperation Agency (JICA) cooperated in the planning, financing and execution of the *Marmaray* Tunnel in Istanbul (Lykke *et al.*, 2005). This is a historic 13.6 km underwater rail link (1.4 km beneath the sea) connecting Europe and Asia beneath the Bosphorus in Istanbul, Türkiye, which opened in 2013. JICA has funded critical projects to ensure water supply in Türkiye's major cities. It has also funded projects to improve water supply in Ankara and Istanbul, and provided aid for the reconstruction of buildings following the 2023 earthquake. According to figures from the International Monetary Fund, investments by Japanese companies totalled USD 2.145 billion in 2023 (under the FDI heading), which, in relative terms, suggests a greater commitment by Japanese private investors to Türkiye's economic growth than that of China.

The framework for cooperation between the two countries is currently an Economic Partnership Agreement (EPA). A free trade agreement is currently being negotiated, which could be close

to being signed⁹, and which would allow Turkish food products duty-free access to the Japanese market. However, at the same time, it will also reduce tariffs on imports from Japan, so it remains to be seen whether the imbalance in trade relations between the two countries will be corrected by the signing of the agreement. One factor in Türkiye's favour is that, as both countries are allies of the US, there is potential to enhance cooperation in non-sensitive areas of the defence industry. In January 2026, Tokyo expressed formal interest in acquiring or collaborating on the development of Turkish drones, specifically the Anka, Bayraktar TB2 and TB3 models¹⁰. It is also considering potential cooperation with Türkiye on coastal defence systems, primarily in the development of unmanned underwater and surface vehicles. A Turkish technical delegation is scheduled to visit Tokyo in March 2026 to advance a formal framework for cooperation in the defence industry. These developments could significantly boost the value of Turkish exports to Japan, as they involve high value-added products. Cooperation with Japanese companies could enhance systems with state-of-the-art technology and, in turn, boost Turkish exports to other parts of the world.

2.3 South Korea: industrial integration

South Korea's economic relations with the rest of the world are characterised by its deep integration into global industrial value chains. In the case of Türkiye, trade between the two countries follows a pattern similar to that with Japan, both in scale and balance. Perhaps it is somewhat more symmetrical in terms of product types: the main imports from South Korea are iron and steel (1.48 billion USD), plastics and articles made from that material (1.34 billion USD) and machinery, mechanical appliances and spare parts (1.26 billion USD). Turkish exports consist mainly of pharmaceutical products (USD 432 million), machinery, mechanical appliances and spare parts (USD 112 million) and minerals and ash (USD 111 million).

⁹ See: <https://www.aa.com.tr/en/economy/turkiye-japan-economic-partnership-deal-under-negotiation-says-turkish-trade-minister-/3547541#:~:text=TOKYO,sustainable%20trade%20structure%2C%20Bolat%20stressed>

¹⁰ See: <https://thedefensepost.com/2026/01/08/turkey-strategic-defense-ties-japan/#:~:text=Asia%20PacificEurope-,Turkey%20Sees%20Potential%20to%20Expand%20Strategic%20Defence%20Ties%20With%20Japan,The%20Bayraktar%20TB3%20drone>

South Korean foreign investment is led by its large industrial conglomerates (*chaebols*) and, as in the rest of the world, focuses on integrating competitive segments of the Turkish business sector into its production chains. The data provided by the IMF varies depending on the source: in 2024, figures reported by Ankara put cumulative South Korean investment over the last ten years at USD 1.438 billion, whilst Seoul reported USD 2.704 billion¹¹. In any case, and as is the case with Japan, South Korea's commitment in this area exceeds that of China in relative terms. Of particular note is the recently signed agreement¹² on nuclear cooperation, which allows KEPCO (*Korea Electric Power Corporation*) to formally participate in the project for Türkiye's second nuclear power plant in Sinop (Ekim and Ersen, 2025).

Relations between the two countries are governed by a free trade agreement that has been fully operational since 2013 (goods) and 2018 (services and investment), the potential of which can still be harnessed to reduce the deficit. The geopolitical dimension is defined by the 'brotherhood' forged during the Korean War and coordination in multilateral forums such as the G20 and MIKTA (a group comprising Mexico, Indonesia, South Korea, Türkiye and Australia). These alliances allow for deeper defence cooperation than with Japan and China. For example, Korea is participating in the development of the new Turkish ALTAY main battle tank, based on the South Korean K2 Black Panther, and has also allowed Ankara to produce the T-155 Firtina self-propelled howitzer, which is a variant of the South Korean K9 Thunder system. The success of Turkish drones in the early stages of the conflict in Ukraine has led South Korea to take an interest in them, to the extent that an agreement has been signed between the Turkish drone manufacturer Baykar and Korean Air to expand cooperation on unmanned aerial technologies. Such collaborations could help balance the bilateral trade deficit.

3 ASEAN: strategic synergies in Southeast Asia

South-East Asia is emerging as a fundamental pillar of Türkiye's Indo-Pacific strategy (Colakoğlu, 2021; 2025a). The size and economic structure of the region's countries allow for a more symmetrical relationship than with the major economies of the

¹¹ These discrepancies are quite common, given the way the data is extracted.

¹² See: <https://www.nucnet.org/news/south-korea-and-turkey-sign-nuclear-cooperation-agreement-11-3-2025>

North Pacific. Ankara has identified Indonesia and Malaysia as its key partners in the region. Both nations are dynamic markets and influential political actors, and also act as key ideological partners in promoting 'moderate Islam' on the world stage (Hadi *et al.*, 2025). Türkiye's strategy is to cultivate these two alliances in parallel, creating a synergistic effect that amplifies its economic, military and soft power reach at the heart of the Indo-Pacific. However, culturally less aligned actors such as Vietnam or Singapore play a very significant role in Türkiye's economic relations with the region.

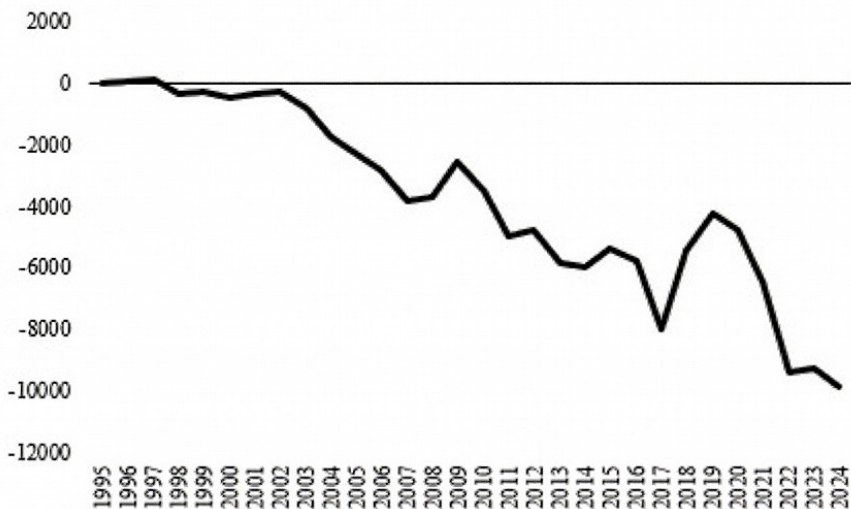


Figure 6. Balance of trade in goods. In millions of USD. Source: UNCTAD

As is the case with other Asian economies, Türkiye's bilateral trade balance in goods with these countries as a whole is negative (see Figure 6), though far from the substantial imbalance with China. With the region's main trading partners, the deficits are significant: a) 2,048 million USD with Indonesia, b) 4,219 with Malaysia, c) 1,388 with Singapore and d) 2,556 with Vietnam. Turkish exports to Singapore are the highest in the region, but are likely a consequence of the city-state's role as a logistics hub and crude oil refiner: half of the exports, some USD 605 million, are refined oil. This is most likely oil from Russia, refined in Türkiye and destined for China or other countries in the region. The same may be true of Malaysia, albeit on a smaller scale.

With Vietnam, there may be another instance of trade redirection, in this case from China. Approximately one-third of exports

to Türkiye consist of mobile phones and computers, amounting to some USD 721 million. These may be re-exports or products from Chinese multinationals that have set up assembly plants in Vietnam (Kwon 2022). In the case of Indonesia, given the wide diversity of trade, this is most likely a matter of direct relations between the two countries. Due to cultural proximity—all three are countries with a tradition of moderate Islam—the analysis of this region will focus on relations with Indonesia and Malaysia. There are significant diplomatic developments on the part of Türkiye that are of interest for understanding Ankara’s pragmatic geoeconomic strategy.

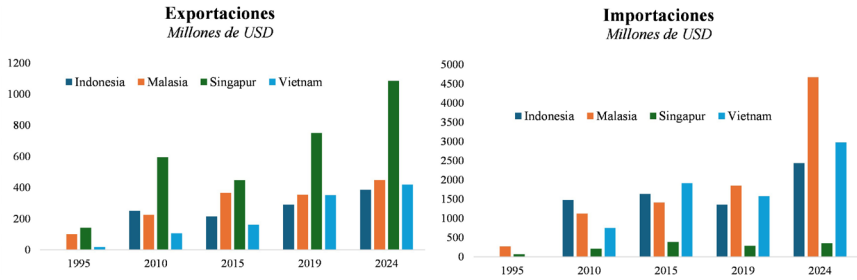


Figure 7. Trade with the Southeast Asian region. Source: UNCTAD

Although they share common objectives, Türkiye’s relations with Indonesia and Malaysia are at different stages of maturity and feature different approaches to cooperation. However, they share a long-term approach, in which trade and investment relations act as the foundation upon which deeper political and security alliances are built.

Malaysia is the country with which Türkiye has the most advanced trade regulatory framework. A free trade agreement was signed in 2015, which was Türkiye’s first with an ASEAN country, and which was expanded in 2022 to cover investment and services. The trade balance in goods is in deficit for Türkiye, with exports of 712 million against imports of 4.4 billion. By product, the export pattern is similar to that observed for Singapore: 23% is refined oil (likely destined for refineries near Singapore), followed by gold and jewellery. Imports consist of semi-finished iron, aluminium and palm oil. In the overall trade structure, there is no significant evidence of Chinese re-exports to Türkiye, as may be the case with Singapore or Vietnam themselves.

FDI follows a similar pattern, with USD 1.7 billion in cumulative investment from Malaysia in Türkiye and USD 844 million in the opposite direction. When compared to their respective GDPs, the figures for Malaysia are relatively high, at least when measured against the levels of China or Japan. The activity of the Malaysian government's sovereign wealth fund, *Khazanah Nasional Berhad*, is particularly noteworthy, which would explain this attempt to 'strengthen' the alliance beyond the economic sphere. For example, this fund owns 100% of the management of Istanbul Airport, one of the busiest in Europe, through a subsidiary. Malaysia also controls the *Acibadem Healthcare Group*, one of the largest private hospital networks in Türkiye. In the field of security and defence, in January 2026, both countries formalised the High-Level Strategic Cooperation Council to deepen investment in defence¹³, which already had a long history. Malaysia has acquired ANKA-S drone systems and Turkish corvettes, suggesting that, as is the case with South Korea, the Turkish defence industry could play a decisive role in rebalancing trade relations in the medium and long term.

Trade relations with Indonesia are not at the same level as those with Malaysia, although a 'Strategic Partnership' has been in place since 2011. This is partly reflected in the lower trade volume in 2024, which exceeds USD 2.4 billion in imports and USD 480 million in exports. Despite the imbalance, the product mix works in Türkiye's favour. The main imports from Indonesia are mineral raw materials (iron, steel, coke and unprocessed man-made fibres), whilst the main exports consist of electrical and electronic machinery, mechanical appliances and spare parts, and a significant amount of defence equipment, in particular USD 68.5 million worth of armoured vehicles. Foreign direct investment figures are very modest and, unlike most countries, flow in the opposite direction. The IMF records Turkish investment in Indonesia in 2024 at cumulative values of between USD 88 million and USD 223 million, depending on the source.

These figures could change once defence cooperation agreements between the two countries are implemented. Agreements are currently in force for the joint production of unmanned aerial vehicles and the Kaplan MT/Harimau tank¹⁴. In July 2025, a

¹³ See: <https://www.thestar.com.my/news/world/2026/01/08/trkiye-malaysia-pledge-deeper-cooperation-in-defense-trade>

¹⁴ See: <https://eastasiaforum.org/2025/03/29/turkiye-indonesia-defence-industry-cooperation-takes-off/#:~:text=On%2012%20February%202025%2C%20Turkish,Ukraine%2C%20the%20Caucasus%20and%20Libya>

contract was signed for the acquisition of 48 KAAN fighter aircraft developed by Turkish Aerospace Industries (TAI). The contract includes the co-production of components in Indonesia over the next ten years. These operations will require original components manufactured in Türkiye and investments on Indonesian soil by the companies involved. This may well be the most promising avenue through which Ankara can redress the imbalance in its trade relationship.

Unlike China, Japan, Korea or Vietnam, the relationship between Malaysia and Indonesia has an ideological component that acts as the cohesive element of these alliances. The idea of 'moderate Islam', compatible with democracy and modernity, is common to all three countries. The cultural proximity and the fact that, geographically, both countries serve as a gateway connecting the Indian and Pacific Oceans is something Ankara will seek to exploit to its advantage. For their part, Indonesia and Malaysia will seek to use Türkiye's position as a gateway to the European market.

4 Balance on the Indian subcontinent: alliance, pragmatism and opportunity

The Indian subcontinent represents one of the most complex regions for Turkish trade policy. It is a scenario in which Ankara must balance historical alliances with Pakistan, economic pragmatism with India, and Bangladesh's growing prominence in global value chains.

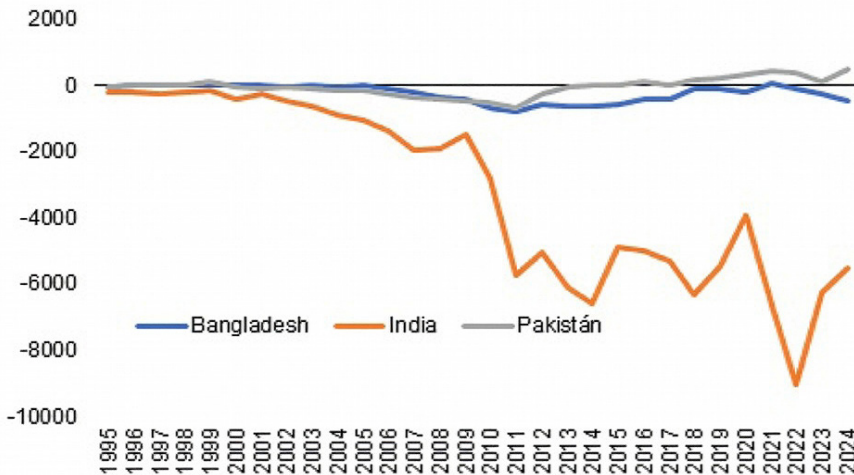


Figure 8. Trade balance in goods. In millions of USD. Source: UNCTAD

As is the case with the rest of Asia, Türkiye maintains a highly unbalanced trade position with the subcontinent. Whilst the relationship with Pakistan and Bangladesh can be considered virtually balanced, the relationship with India shows a trade deficit comparable only to that with China. Although total trade is far from being on the same scale (the sum of exports and imports amounts to just 8.5 billion USD), the vast majority consists of imports from India (over 7 billion).

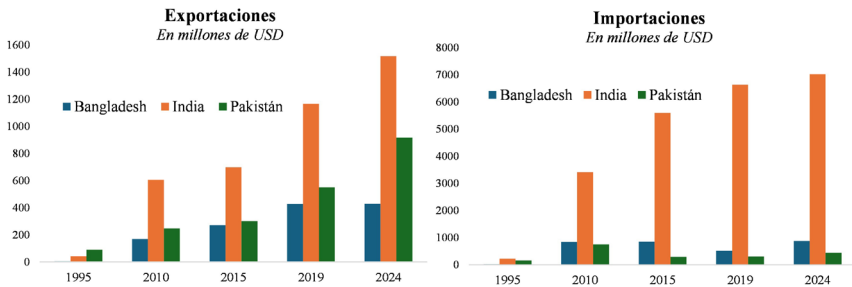


Figure 9. Trade with the Indian subcontinent. *Source:* UNCTAD

India is also the main destination for Turkish exports to the region, although the gap with Pakistan is not as pronounced as it is for imports. The demographic and economic strength of the subcontinent—a market of nearly 1.8 billion people—and its strategic position on the maritime route to the Far East make it a region that Ankara cannot afford to ignore. However, the geopolitical fragmentation of the subcontinent makes it extremely complex to devise a clear strategy. This difficulty is not specific to Türkiye; it also affects the rest of the world's major powers, including China and the US.

4.1 Pakistan: Comprehensive Strategic Partnership

The Turkish-Pakistani relationship is defined as a strategic alliance deeply rooted in history (Ahad, 2023), shared identity and robust defence cooperation.

Bilateral trade is on an upward trend, but remains below its potential. In 2024, Turkish exports to Pakistan reached USD 918.03 million, whilst the total trade volume stood at USD 1,358.3 million, with a Turkish surplus of approximately USD 478 million. The figures are modest compared with other countries, but viewed in historical perspective they show extraordinary dynamism, as

exports have tripled between 2015 and 2024. This is due to the gradual reduction of tariffs between the two countries whilst the current Trade in Goods Agreement, which came into force in 2023 (PBS 2025), was being negotiated. Ankara granted preferences across 261 tariff lines, of which 123 lines (5 agricultural and 118 industrial) were immediately subject to zero tariffs. Islamabad offered preferential access across 130 tariff lines, focusing on intermediate goods and machinery to boost its own industry.

By product, Türkiye is the economy whose exports have the highest value added, a fact reflected in the lack of dynamism in Pakistani exports. Approximately 24% of Turkish exports consist of mechanical machinery, spare parts, and electrical and electronic machinery. Almost 45% of imports are cotton, fabrics and textiles at various stages of processing.

Defence cooperation between Türkiye and Pakistan has evolved from a buyer-seller relationship into a strategic partnership for co-production and technology transfer, establishing itself in 2025 as the strongest pillar of their bilateral alliance. In February 2025, during the 7th session of the Strategic Cooperation Council, four specific defence memoranda were signed, focusing on the joint manufacture of military equipment¹⁵. Pakistan has formally joined the Turkish fifth-generation fighter programme KAAAN (TF-X). It has also acquired Bayraktar TB2 and Akıncı drones, and both countries have signed agreements for the integration of advanced Turkish munitions into Pakistan's fleet of JF-17 Thunder fighter jets. Pakistan's MILGEM naval modernisation project involves the construction of four corvettes, two of which are being built in Istanbul and two at the Karachi Shipyard (KS&EW), facilitating a direct technology transfer to Pakistan. Türkiye is also participating in the modernisation of Pakistan's Agosta 90B-class submarines.

The relationship also includes joint military training and exercises: more than 1,500 Pakistani officers have been trained in Türkiye. Conversely, the Pakistan Air Force trains Turkish pilots in combat tactics. In 2025, key manoeuvres such as Tarlan-2025 (drone operations) and Infinite Brotherhood IV were conducted, also involving forces from Central Asia.

¹⁵ See: <https://www.aa.com.tr/en/energy/general/turkiye-pakistan-sign-24-cooperation-agreements-to-strengthen-bilateral-ties/47515#:~:text=English-,Turkey%2C%20Pakistan%20sign%2024%20cooperation%20agreements%20to%20strengthen%20bilateral%20ties,technology%2C%20and%20several%20other%20fields>

With regard to investment flows, the net balance is highly favourable to Türkiye. Cumulative investment in Pakistan is estimated to reach USD 153 million by 2024 according to Turkish sources cited by the IMF, and over USD 300 million according to Pakistani sources. Conversely, Pakistani investment in Türkiye is negligible. It should be noted that, in the figures provided by Ankara, there has been a significant reduction in the cumulative total since 2020. This typically points to Turkish divestment in the country, likely due to political instability. In any case, the relationship is structured within very solid institutional frameworks such as the High-Level Strategic Cooperation Council (HLSCC) and the Strategic Economic Framework (SEF), which includes a 71-point action plan to improve cooperation in sectors such as banking, finance, energy and tourism (MOFA, 2025).

Within the investment chapter, the revival of the Istanbul-Tehran-Islamabad rail corridor, announced in late 2025 by Pakistan's Minister of Railways¹⁶, is particularly noteworthy. Apart from the information published in the local press, there is no confirmation that the corridor will be operational by early 2026. Economic sanctions and the enormous geopolitical tension surrounding Iran make it unlikely that the project will be clearly viable in the short term¹⁷. However, it is highly indicative of Islamabad's interest in having a land connection with Ankara and, ultimately, with Europe.

As in the case of Malaysia and Indonesia, Islam is a unifying element in cultural and political diplomacy. Islam constitutes the core of identity and symbolism that has underpinned relations between the two countries since their inception. Even before Pakistan's independence, the Muslim communities of the Indian subcontinent expressed deep solidarity during the Turkish War of Independence (1919–1923), channelled through the Khilafat Movement (Okö, 1991). Following the creation of Pakistan in 1947, Islam continued to be a unifying element in cultural and political diplomacy. Both states define themselves as Muslim republics and have promoted cooperation in Islamic forums such

¹⁶ See: <https://en.mehrnews.com/news/239431/Iran-Pakistan-Turkey-freight-train-to-resume-activity-soon#:~:text=TEHRAN%2C%20Dec.,important%20for%20Pakistan's%20regional%20trade>

¹⁷ See: <https://www.dw.com/en/is-the-pakistan-iran-turkey-rail-link-economically-viable/a-56225236#:~:text=Iran%2C%20Pakistan%20and%20Turkey%20have,three%20countries%20bear%20its%20cost?&text=Last%20month%2C%20Turkish%2C%20Iranian%20and,countries%2C%22%20she%20told%20DW>

as the Organisation of Islamic Cooperation, championing common causes such as the Palestinian question and the protection of holy sites in Jerusalem.

4.2 India: between pragmatism and tension

Relations with India are characterised by a tension between the Asian giant's enormous economic potential and the political differences stemming from the geopolitical rivalry between New Delhi and Islamabad (Çolakoğlu, 2025b). Although bilateral trade between Türkiye and India is significantly higher than that with Pakistan, ranging between eight and ten billion USD (see Figure 9), it is extremely vulnerable to geopolitical friction, as demonstrated by the decline in trade flows and the boycotts observed in 2025¹⁸. The sources of tension are clear: Ankara's pro-Pakistan stance on the Kashmir conflict, evident during the Pahalgam crisis, and the sale of Turkish UAVs to Pakistan, which New Delhi perceives as a direct threat to its security. This political climate has eroded cultural ties, even leading to the suspension of agreements between Indian universities and Turkish institutions on grounds of national security.

In 2024, the pattern of bilateral trade between Türkiye and India was very different from that with Pakistan. More than 35% of Turkish imports consisted of mechanical and electrical machinery, vehicles and motor cars, and aircraft, which were worth over USD 2.3 billion. Conversely, the most significant exports to India were fuels and mineral oils, worth around USD 653 million, accounting for over 23% of the total volume. Türkiye is not an oil producer, so it is likely that these are re-exports of oil from Russia and Azerbaijan¹⁹. The ongoing negotiations on tariff agreements between India and the US could reduce Indian imports of Russian crude oil and, perhaps, have an impact on Turkish exports²⁰.

Foreign direct investment flows are modest compared to the scale of trade. Unlike China, India's cumulative investment

¹⁸ See: <https://www.dw.com/en/turkey-faces-indian-backlash-over-pakistan-ties/a-72597023>

¹⁹ See: <https://energyandcleanair.org/publication/sanctions-hypocrisy-g7-imports-eur-1-8-bn-of-turkish-oil-products-made-from-russian-crude/#:~:text=Sanctions%20hypocrisy:%20G7+%20imports%20EUR,2024%20spending%20on%20the%20military>

²⁰ See: <https://es.euronews.com/business/2026/02/09/las-refinerias-indias-reducen-su-dependencia-del-crudo-ruso-que-implica-para-ambas-partes>

in Türkiye is very low, barely exceeding USD 110 million in 2024. Turkish investments are higher, at USD 255 million, and it is notable that there are hardly any statistical discrepancies between the figures. Türkiye's investments in India are mainly concentrated in the infrastructure, engineering and consumer goods sectors, often operating through joint ventures with local partners²¹.

There is another point of geoeconomic friction between the two powers. Due to their geographical position, both countries compete for international investment in trade routes between Asia and Europe. There is a project backed by India and the US, the India-Middle East-Europe Economic Corridor (IMEC), which is a mega-infrastructure project presented at the 2023 G20 summit. The idea is to connect India with Europe via the United Arab Emirates (UAE), Saudi Arabia, Jordan and Israel. Ankara opposes this project because the route excludes Turkish territory, passing through Israel and Greece. As an alternative, Türkiye is promoting, alongside Iraq, Qatar and the UAE, the Development Highway project, a route connecting the Persian Gulf with Europe via Turkish territory (see the chapter in this volume 'The geoeconomics of Türkiye in Eurasia'). Although these developments must be viewed within the context of the belated response by the West and the Gulf states to China's Silk Road logistics projects, the fact remains that Türkiye's land connection to the Persian Gulf via Iraq, beyond the rivalry with the Indian and US project, would be of interest in itself to Ankara.

4.3 Bangladesh: an emerging low-friction partner

The relationship with Bangladesh is shaping up to be a rapidly expanding partnership, driven by economic synergies and free from the geopolitical tensions that characterise the link with India. The arrival of the interim government led by Muhammad Yunus (who stepped down in early 2026) has facilitated a closer rapprochement with Ankara. This rapprochement has raised concerns in India which, as in the case of Pakistan, views with suspicion Türkiye's supply of military technology to Dhaka (although relations are far less tense than with its western neighbour).

²¹ See: <https://www.ibef.org/indian-exports/india-turkey-trade#:~:text=Turkish%20companies%20operating%20in%20India,joint%20ventures%20with%20Indian%20firms>

Trade flows are less intense than with the rest of the subcontinent, but the balance of trade in goods is favourable to Bangladesh. In 2024, Türkiye imported approximately USD 876 million, the vast majority of which was textiles and clothing (almost 90%), due primarily to Bangladesh's role as the final destination in the sector's global value chains. Turkish exports amounted to USD 428 million, mainly cotton and machinery, which together account for over 55% of exports. There are no general free trade agreements or treaties, although negotiations are underway to reduce tariffs in certain sectors. Investment flows are very limited and, according to IMF statistics, flow only in the direction of Bangladesh. Recently, the country's investment agency has offered to establish a special economic zone dedicated solely to Turkish companies²².

The key pillar of the relationship between the two countries, as is the case with Pakistan, is defence cooperation. High-profile acquisitions such as the TRG-300 Kaplan missiles and the Bayraktar TB2 UAVs have cemented Bangladesh's position as a strategic customer for the Turkish defence industry. The country is seeking to reduce its dependence on systems from India and China, and Türkiye is emerging as an alternative supplier with which there is cultural affinity (both are members of the Organisation of Islamic Cooperation). In short, due to the geopolitical tension between India and Pakistan and Bangladesh's growing integration into global value chains, it is possible that this country may ultimately emerge as the safest bet in the area for Türkiye's economic strategy in the region.

Conclusion

An analysis of Türkiye's strategy in the Indo-Pacific region reveals that the Asia Anew initiative is not a monolithic doctrine, but a sophisticated and nuanced approach that is carefully calibrated for each partner and each sub-region. Far from applying a one-size-fits-all approach, Ankara navigates Asia's complex geopolitical landscape by pursuing multiple foreign policies in parallel, tailored to maximise its influence and economic interests whilst managing the frictions inherent in such a dynamic environment. At the same time, it must not neglect traditional allies such as the US, which may react negatively to excessive rapprochement with

²² See: <https://en.yenisafak.com/world/bangladesh-positions-itself-as-hub-for-turkish-investors-in-asia-3709069>

China, or allow defence cooperation with Pakistan to hinder the expansion of its exports to India.

Diversifying its trading partners and a firm commitment to strategic autonomy could reduce Türkiye's dependence on its traditional markets (the EU and the US) and consolidate its position as a logistical and productive bridge between Asia and Europe. In the short to medium term, seeking to attract investment in technology, renewable energy and infrastructure from the Far East could enable Ankara to accelerate its long-term economic growth. Deepening involvement in logistics projects such as the Middle Corridor or the land link to the Persian Gulf would strengthen its strategic position as a bridge between Asia and Europe. Strengthening cooperation in defence and dual-use technologies with partners in South and Southeast Asia points towards greater integration into highly complex value chains. However, all these projects must take into account that they are being developed amidst growing rivalry between the major powers (China, the US) and the prominence that India is acquiring on the continent.

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Conclusions

Jesús Gil Fuensanta

Located in the eastern Mediterranean, Türkiye lies at the cross-roads of two continents, Europe and Asia. With a mountainous interior across much of the Anatolian peninsula and, in particular, around its capital Ankara, this unique geographical position not only shapes its worldview but also makes it a paradigm of what Spykman considered a key territory within his Rimland framework, 'the land of the margin' (e.g. Castro Torres).

The Turkish victory at the Battle of Manzikert (present-day Malatya, in the east of the country), which took place in 1071 against the Byzantine Empire, did not mark the first settlement of the Turks in Anatolia (since this settlement dates back to the heart of the Early Middle Ages), but rather the assertion of political and territorial control over a pivotal region, as well as the rudiment of the dream and the subsequent creation of the Ottoman Empire.

In the far-reaching geopolitical perspective on the Republic of Türkiye presented in this notebook, Zbigniew Brzezinski's view (cf. Castro Torres; Duran Cénit) that it is a 'pivot state' due to its significant geographical position carries weight, whilst also demonstrating that it is a geopolitically active player (e.g. Castro Torres).

In contrast, the 'non-Confucian' perspective characteristic of the People's Republic of China (PRC), which regards Türkiye as a mere transit territory for goods, is founded on the supposed 'oriental inclination' of the Turkish Republic—albeit one that is necessary and indispensable for China's Belt and Road Initiative (apud Rodríguez García-Brazales). This view has not been substantiated in the report (e.g. Castro Torres, apud Rodríguez García-Brazales) and, on the contrary, it is evident that Türkiye has successfully leveraged its characteristics as a central territory rather than merely a corridor for the movement or circulation of goods; the role currently played by the Turkish Republic therefore confirms the theory of the Rimland geopolitical vision, according to Nicholas Spykman.

In short, Türkiye does not aspire to a change in the existing order nor does it seek to undermine it, but it does wish to escape the role of a clearly subordinate country within this apocryphal world order (e.g. Rodríguez Gómez); to this end, the Turkish Republic can be regarded, to a certain extent, as a revisionist yet adaptive power, which avoids direct confrontation with the established order but explores various possible scenarios and alliances, free from external pressure (*Ibid.*).

Today's Türkiye does not adopt any Confucian or Eastern perspective (cf. Rodríguez García-Brazales), but rather sees itself as a bastion of the Muslim world. In terms of its geopolitical vision, Türkiye is Europe, but within a European world where the Muslim perspective must be a key part of its culture.

For a section of Europeans—one might say 'Western Europeans'—there is a particular importance in integrating Türkiye into that Western world.

The high degree of interdependence in investment between various European countries and Türkiye fosters a geoeconomic perception that Europe and the Republic of Türkiye are mutually dependent, particularly in economic terms (cf. Rodríguez García-Brazales); this is further reinforced by the fact that the European Union is Türkiye's main trading partner, supplying it with technology (e.g. Alberich Lanzos and Gosálvez Frías).

As this report rightly emphasises, Türkiye is a 'regional actor with international characteristics' (cf. Castro Torres).

The Republic of Türkiye, in accordance with the principles set out in the first chapter of this report, would appear to be a potential

and necessary actor within the new global order, for various reasons relating to regional stability.

As discussed in this study (e.g. Duran Cénit; Rodríguez Gómez), Türkiye's current geopolitical orientation does not signify a shift in international or geopolitical priorities. It was its standard policy prior to the formation of the Republic following the end of the First World War.

As can be seen in the paper, there are various key 'imaginaries' in the Turkish geopolitical narrative, but the fundamental geopolitical idea put forward today as a 'central power' stems from the ideas set out by the late Ahmet Davutoglu (cf. Castro Torres; Duran Cénit).

Within the Republic of Türkiye's proposal to be a major geopolitical pivot capable of adapting to multipolarity, the argument is rightly put forward that Türkiye was one of the countries that best anticipated the shift in global power structures and excelled in planning its interests, even outpacing the other NATO countries (e.g. De Castro García).

On the other hand, and following assumptions that could be considered 'neo-Darwinian' but applied to geopolitics, the scenario of seeking regional geostrategic primacy is not only nothing new for Türkiye, as the heir to the old Ottoman Empire, but also falls within the postulates of the age-old struggle for primacy of any entity, for the sake of its survival, adapted in this case to the frameworks of geopolitics, and which, ultimately, demonstrate the quest of every nation in our world for a status of its own that holds a certain relevance, if not predominance, on the global stage, simply by following the principles of traditional foreign policy, including the 'soft power' approach.

Ultimately, following this narrative, one might conclude that the logical and sound foundations of a veteran regional power (such as Türkiye) are better for regional and global geopolitical stability than new experiments that run counter to the existing world order. It should be remembered that in the distant past (e.g. the Bronze Age), the region of Anatolia was more stable when it functioned as the nerve centre of empires with strict internal organisation.

According to the geoeconomic analysis in this notebook (e.g. Rodríguez García-Brazales), the Republic of Türkiye has a very well-planned strategy, nothing left to chance. Under no

circumstances does the economic policy of today's Türkiye appear to be the result of a 'trial and error' approach.

However, in summary, the facts analysed in this issue (e.g. De Castro García) reveal a significant cultural and 'emotional' influence derived from the Ottoman Empire, within which the geographical boundaries of the Republic formed the core.

Even today, there remains a belief among the country's most traditionalist or conservative nationalist strata that the 'Ottoman system was the best', in terms of political and social governance; those from these strata, interviewed personally, and with such nostalgia, also equate it with the notion of having had a (supposed) degree of democratic respect on various levels: political, social, economic, etc.

As emphasised here in our joint work, the Ottoman government was noted for its patience and willingness to negotiate, seeking above all rationality in its form of administration (e.g. De Castro García).

Seen in this light, one might think that the current Republic of Türkiye appears to suffer from the same drive to reclaim a bygone glory (in this case, the Ottoman Empire), which was absent for much of the 20th century, but which had not entirely disappeared, particularly for traditionalist nationalist sectors, just as is the case with other fallen empires (e.g. the USSR for the current Russian Federation).

In Türkiye's case, that Empire disappeared more than three generations ago. In the past, there were several attempts to bring this 'non-Ottoman' traditionalist nationalist tendency to the fore (such as Menderes in the 1950s, or the rise of the Refah Party in the mid-1990s) which 'failed' (due to external pressures on the government of the time), and this seems to have shaped the *psyche* of the Republic of Türkiye and its past and present rulers, leading to a government of this ilk since the early 21st century, but 'having learnt its lessons well' to avoid those failures within 'neo-Ottoman' traditionalism that did indeed occur in the attempts described following the formation of the republic.

This research suggests that the 'neo-Ottoman' concept did not originate with the AKP's Türkiye (cf. Durán Cénit), but it is during this period that this notion has been revitalised and consciously transformed into a tool of foreign policy and geopolitics.

The case of Israel presents a significant particular issue in the current year of 2026: there is a growing tendency to regard it as the Republic of Türkiye's major regional rival, ahead of traditional adversaries such as Russia or Persia (now the Islamic Republic of Iran). The conclusion is entirely logical. And not only because of the marked deterioration in relations between Türkiye and the country in the southern Levant since the start of the current Gaza conflict (*e.g.* Alberich Lanzos and Gosálvez Frías).

The State of Israel is currently more than just a medium-sized regional power; with a small population and territory, it nevertheless exerts a major influence on international geopolitics and security, as well as being a leading power in fields such as armaments and cyber technology.

Furthermore, the issue of Somaliland places Israel in an increasingly significant geopolitical role within the territories of Dar al-Islam (countries with a Muslim majority), even beyond the Middle East. Indeed, the Horn of Africa had an impact on the population of the southern Levant a generation ago, during Operation Moses, when Israel repatriated thousands of African Jews to its territory, where they are now Israeli citizens.

Today's Türkiye, which is largely the heir to the Ottoman Empire, feels and believes, moreover, in the moral imperative to protect both the sites of the 'former Caliphate' and the 'holy sites' of the Sunnah; and this is, to some extent, the basis for its protection of Palestinian territories, such as Gaza, and any issues relating to the Strip, including the migration of its citizens to other territories, as the Turkish Republic itself has been shaped by populations who have migrated from Syria for much of the current 21st century. For this reason, Türkiye's strategy of using Islam as a unifying element of its cultural and political identity makes perfect sense (*e.g.* Rodríguez García-Brazales).

This report notes that effective management of migration issues, alongside very active and close cooperation with the EU in this regard, contributes to regional stability, which is particularly relevant because Türkiye, in recent years, has taken in the largest number of refugees in the world (*e.g.* Duran Cenit); in my view, this may be one of the best paths towards some form of close partnership with the Union.

Türkiye's interests in Africa also have their roots in the Ottoman era, when the semi-independent sultanates existed in the Maghreb. Today, the Turkish Republic has become a security

alternative to that offered by the Russian Federation, through the Afrika Corps (formerly the Wagner Group), with distinct characteristics that have brought it success (e.g. Santiago Oti).

Türkiye views Africa as a turning point, particularly in terms of its specific strategy of gradually accumulating options (e.g. Rodríguez Gómez).

The issue of the Sahel and the heart of Africa presents a highly diverse yet dynamic picture of Türkiye's foreign policy (cf. Santiago Oti). The logic behind this approach is shaped by the diversity of territories with distinct dynamics. Hence, the Turkish Republic employs the full spectrum of its foreign operations: educational and cultural 'soft power', diplomatic and economic 'soft power', as well as 'military' geopolitics.

Despite its successes on the African stage, Türkiye's actions in this context have drawn some criticism; particularly regarding the sale of these drones to territories currently embroiled in fierce and genuine civil wars (*Ibid.*).

Initially, years ago, the opening of embassies and regular flights in Africa was seen as another Turkish alternative to its more focused role in other regions (Central Asia, the Middle East, the South Caucasus), similar to the role Türkiye currently plays in Latin America (e.g. Rodríguez Gómez). However, it is now evident that this is a very well-defined and carefully considered strategy; it is the logical extension of the large base established in Somalia (cf. Santiago Oti), which grants the republic extensive coastal control over Africa. Furthermore, its dealings with Tunisia and Algeria would confirm this coastal manoeuvre.

Another issue is its commitment to selling drones to Morocco, which clashes with Spanish geostrategic interests. This is a factor that could cause greater friction in the not-too-distant future.

It can be argued that, in certain cases, on a global level, the sale of Turkish drones has succeeded in balancing the forces; there is the case of the Russian-Ukrainian war (e.g. Rodríguez García-Brazales), where initially it provided significant tactical assistance to the forces in Kyiv. Something similar could apply in the Libyan case, where the Turkish presence has managed to curb further expansionism in the territory controlled by the Haftars.

Africa is proving to be an excellent turning point and a source of current successes for the Republic of Türkiye.

Libya is a prime example of Türkiye's military presence and its plans to expand its influence across the African continent (e.g. Duran Cenit, Santiago Oti). Türkiye's backing of the Tripoli government (cf. De la Cámara Hermoso), the most internationally recognised, is logical, given the Ottoman past in the Maghreb and a special 'Turkic' affiliation of the Misrata tribe (now very prominent in Libyan power structures); but its continued presence in the country will depend on the future of the Haftar clan from Beyda, in the east of the country, where the octogenarian Marshal Khalifa aims to install his son, Saddam Haftar, as the country's president. It must be borne in mind that Khalifa Haftar already controls two-thirds of the country *de facto*, having, in part, broken the traditional Tripolitania-Cyrenaica division in the Maghreb nation; there is even a third geographical factor now at play, with the Tebu and Tuareg tribes in the southern interior desert, which are making the situation in the Sahel increasingly volatile, and which is spreading due to its porous border crossings.

But as has been rightly said, Türkiye's intervention in the Libyan theatre has acted as a 'counterweight' to the expansionism of the Haftar family; it has also been key to Türkiye's reputation on the southern stage of the continent. And this move, from our point of view, has catapulted Türkiye's presence in the Sahel and the heart of Africa, to the detriment of the Russian Federation (cf. Santiago Oti).

Türkiye has secured major economic contracts and access to resources such as uranium, metals and other minerals in the Sahel (as in the case of Niger) and the Central African Republic (*ibid.*). The diversification of its foreign policy is also highly exemplary further south; growing cooperation with South Africa has not required Türkiye to send frigates to the military exercises that took place in the region in early 2026. Likewise, its 'soft power' through Turkish Airlines (THY), television series or the construction of mosques, as well as subsidies for schools and Turkish language learning, are an impeccable extension of its geopolitical vision through 'science, education, language and Hanafi belief' (the predominant school of Islamic law in Türkiye, which is, moreover, the most tolerant within Sunni Islam); this is yet another demonstration of the integrated and coordinated strategy within Turkish foreign policy and action (e.g. Rodríguez Gómez).

Given Türkiye's positive results in Africa, in the medium and long term, it consequently becomes the local geopolitical rival of the

Russian Federation and the People's Republic of China (PRC) on the continent.

Türkiye's African strategy presents one of the greatest paradoxes for the republic: whilst it is the 'non-traditional' territory where it has achieved the most success in recent years, it has also gained two major rivals, Egypt and the United Arab Emirates.

Egypt has traditionally been the cultural hub for the Arabic-speaking world; a role now also filled by Turkish TV series. But the rivalry goes further, as indicated by Türkiye's strategic position in territories such as Sudan and Ethiopia (e.g. Santiago Oti), which could determine future intervention regarding water supplies to the traditional 'land of the Nile'.

The United Arab Emirates' presence in Africa has a dual significance; it should be remembered that they were the first Arab country to sign the Abraham Accords in 2020. The Emirates are a strategic ally for Israel in the region. Furthermore, Israel's recognition of Somaliland provides the country in the southern Levant with access to a strategic location in the Horn of Africa.

On the other hand, one might refine this by noting that, in short, Türkiye's foreign policy strategy towards Central Asia could resemble its African strategy in terms of the dividends reaped and the wide range of fields covered (science and culture, diplomacy, business and economics, and education), but it is quite different in that the 'on-the-ground' military option does not extend east of Türkiye.

Central Asia is a much more stable region than the heart of Africa or some of its coastal areas. The local states of the Central Asian republics, the so-called 'tanes', exercise far greater control over the territories under their rule than the governments of the Sahel; the Turkic Central Asian republics, with their additional centralising characteristics and presidential systems, also maintain good relations with their Turkish cousins. The fact that Türkiye and four of the republics (the Turkic ones), known as the 'tanes', belong to the Organisation of Turkic States facilitates transactions.

Likewise, the existing (or potential future) rail corridor connecting Türkiye with Central Asia, via the South Caucasus and the Caspian Sea on the one hand and the Gulf and the Middle East on the other, always allows for a direct link with Europe; thus acting as a key hub for the integration of European rail networks, with the added value of industrial zones spread along these same Eurasian routes (e.g. Alberich Lanzos and Gosálvez Frías).

The case of Turkish Mesopotamia, that is, the region of eastern Türkiye, the territory between the great rivers, may have an important future within the global geopolitical landscape. The fact that (following an apparent maxim of dynamiting the established world order against American nature) the current US administration of the 47th President of the United States, Donald John Trump, does not appear to unconditionally support the Syrian Kurds as previous US presidential administrations had done in the past, has opened up the possibility of a new conflict in the self-proclaimed Syrian Rojava (Syrian Mesopotamia), which is currently under siege by the current Syrian government (with a Salafist past and undisguised fundamentalist intentions). This danger could well spread to the Turkish Mesopotamia region, thereby creating a serious problem for the vital issue of internal security in the Republic of Türkiye.

The eastern and south-eastern regions of Türkiye are home to millions of ethnic Arabs, where, although their numbers have increased in the last decade due to Syrian refugees, a large proportion had already been living in the Turkish border provinces since pre-Ottoman times.

These Turkish citizens have not posed any recent geopolitical challenge to the Ankara government (*e.g.* De Castro García).

On the other hand, if revisionist sectors in Israel (following certain principles associated with Greater Canaan, 'the ancient northern land' for the ancient Semitic peoples who inhabited the area in antiquity) were then to make common cause with the secessionist Kurds (a fear expressed among local Turkish nationalist groups), as potential allies in such a scenario, this could unleash not only major regional instability but also a veritable 'Achilles' heel' for the geopolitical aspirations of the Turkish Republic, for which stability and solidity are of paramount importance.

From the perspective of regional stability and world peace, this could perhaps be one of the worst future scenarios for regional geopolitics. And this is what we fear and believe must be avoided.

Within another geopolitical framework, the current Turkish government has at times, over the last quarter of a century with the AKP in power, come to consider that both Iran and Russia, traditional geostrategic antagonists, may now indeed be not only 'good neighbours' but 'potential allies'; viewing them as such may prove to be a long-term mistake in geopolitical terms, given that they do not share the same interests or objectives, and may

even become future rivals in other geographical scenarios, such as in Africa *vis-à-vis* Russia, and in Central Asia *vis-à-vis* both Russia and Iran. The outcome depends on which power gains the most presence and influence in the aforementioned regions, to the detriment of either the Russian Federation or the Islamic Republic of Iran.

Regarding these other powers, there is also a historical warning. Throughout history, any expansionist world power has been afflicted by a certain 'Chosroes II syndrome', named after the last king of the Persian Sassanid dynasty, who was defeated at the height of his territorial expansion and imperial influence. This syndrome refers to how any expansionist excesses by a 'revisionist' regional or global power could bring that power or country to the brink of collapse, as revealed by 21st-century cases such as Saddam Hussein, Muammar Gaddafi or the Assads. All these figures, having fallen from power, are akin to recent 'Queen Zenobia of Palmyra' (who confronted Rome), who, whilst enjoying a temporary strong regional position, came to overestimate their power and ended up confronting one of 'the great world powers of the time' with disastrous results.

The Ottoman past, which stems from late medieval roots (referred to by revisionist authors as 'late agrarian', *cf.* Baqués (2023), as cited in this volume, *e.g.* De Castro García), also affects populations of Turkish origin who are citizens of Eastern Europe, in the Balkan region.

The south-eastern region of Europe represents significant stability in terms of demand and industrial projection within its geoeconomic framework, as an extension of the European economic space, for Türkiye (*e.g.* Alberich Lanzos and Gosálvez Frías). As a point of interest, a European country with almost no Turkic population, Albania, is the place in the Balkans where the greatest investment from Türkiye is made (*Ibid.*)

Within this post-Ottoman framework concerning the Balkans, the current Republic of Greece occupies a special position. Since antiquity, the Hellenic country has been rooted in maritime power; Türkiye is positioning itself to become the great thalassocracy in the eastern Mediterranean, and as a result is entering into a geopolitical clash not only with its immediate western neighbour, but is thereby turning the latter into a potential ally of the navies of Israel and Italy, repeating old patterns of the 'Holy Alliance' from the Ottoman period.

It is also emphasised that there has been an evolution over this quarter of a century during which the AKP has been in charge of Türkiye's politics (e.g. Duran Cénit). Much has changed since those years around the onset of the great global economic crisis of 2007–2010, when the local Turkish vision of 'zero problems with neighbours' prevailed; indeed, very much in line with the recent foreign policy of the Indian Union, where the slogan 'neighbours first' predominates.

This reorientation of Turkish doctrine (*Ibid.*) appears to have been successful, given the achievements and international visibility Türkiye has attained.

In the Republic of Türkiye, internal security is a crucial issue and, moreover, a logical obsession, as its successful achievement will always result in a more stable country with greater potential to exert influence abroad.

Its ability to project power and exert influence depends on the stability of its internal security (cf. Gazapo Lapayese).

Hence the vital importance of internal security against the Kurdistan Workers' Party (PKK), which is regarded by the Republic of Türkiye as a terrorist group (e.g. De Castro García).

The PKK and related entities (YPG), given the significance of the Kurdish issue in the country, have been a fundamental key element in Türkiye's internal security architecture for several decades (e.g. Gazapo Lapayese). This Turkish stance of 'security control' is understandable, as it appears that this Kurdish separatist threat poses a risk not only to control over a significant portion of the country (beyond eastern Türkiye), but also to Turkish expansion in terms of soft power and influence in the region. Furthermore, control of the rivers in the east and the Mesopotamian region consequently becomes a fundamental part of the tensions with rival powers in the region, the hypothetical geostrategic implementation of which could even go so far as not only to threaten the stability of the eastern part of the Republic, but also to turn it into a focal point for potential future confrontations.

Thus, it can be understood that security against the PKK and related groups is also a matter of national sovereignty for Türkiye.

Cyberspace is emerging as the major growing internal security issue in the Republic today (e.g. Gazapo Lapayese).

As in the rest of the countries of Dar al-Islam (countries where Islam is the predominant faith among citizens), Daesh is the other major phenomenon that could threaten Türkiye's internal security.

As our analyst Gazapo Lapayese notes in his study of these threats, it is evident that Türkiye has managed to strengthen its operational and technological capabilities; however, it is warned that the ongoing 'securitisation' (e.g. Gazapo Lapayese, this volume), democratic deficits and the absence of substantive political solutions may, in the medium and long term, reproduce the very threats that the state seeks to neutralise.

The hypothetical scenario of a potential uprising in the style of a 'Turkish Spring' would be the other potential internal security challenge facing the country.

There is also the case of the viable 'Persian Spring', which began in December 2025 and has recently enjoyed widespread international attention; this could subsequently affect countries in the region 'by osmosis', that is, indirectly but clearly. For this reason, there are neighbouring countries such as Saudi Arabia that view the progress of this type of protest with reluctance; Türkiye is another nation closely monitoring the events unfolding in the Islamic Republic of Iran (IRI). This stands in contrast to what occurred in some of the Gulf monarchies, which, even during the first phase of the so-called 'Arab Spring', accused the IRI in varying degrees of being behind the protests that led members of the Shia minorities in the region to demonstrate (most notably in the case of Bahrain). It does not appear that US policy towards the IR will be enthusiastically supported in Türkiye's geopolitical plans.

One of the main factors driving Türkiye's fear of potential conflicts in its neighbourhood is its significant structural dependence on foreign energy supplies (e.g. Alberich Lanzos and Gosálvez Frías). An armed conflict in the region would undoubtedly affect the gas pipeline between Tabriz and Ankara, which accounts for around 14% of the gas imported by Türkiye (e.g. Alberich Lanzos and Gosálvez Frías). Furthermore, regional military hostilities would affect the transit of other oil pipelines in the area, which also supply hydrocarbons to the Republic of Türkiye.

From this analysis, it can be concluded that several of the trade routes that Türkiye maintains as a strategic link between the Eastern world and Europe have been affected by the conflicts and wars of this third decade of the 21st century (*cf.* Rodríguez García-Brazales).

However, if there is no armed conflict against the Shia theocracy, the Republic of Türkiye could stand to benefit by playing a mediating role in the region; it might even find support for its nuclear ambitions through the transfer of Iranian uranium to Turkish territory.

The Turkish Republic, moreover, appears to aspire to manage US interests in the Middle East as part of its geopolitical ambitions, but it is not entirely clear whether this is the shared vision of the current US administration under President Donald John Trump; the issue lies in the ups and downs in decision-making and the changes of course on geopolitical matters by the US side since late January 2025. At times, it seems that the preferred mediator in the Middle East is Saudi Arabia, and at others, the preference shifts towards Türkiye. For this reason, both nations (along with Qatar) have joined Trump's Board of Peace.

The issue of Azerbaijan and its link with Türkiye is very interesting, for despite the existence of the slogan 'one people, two nations', the South Caucasus country is today one of Israel's closest international allies, a regional geopolitical rival of Türkiye.

In contrast, the South Caucasus is a key region for Turkish geopolitics and geoeconomics (e.g. Alberich Lanzos and Gosálvez Frías; Rodríguez García-Brazales). And Azerbaijan is, in addition to being the major investor from the Caucasus and Central Asia in Türkiye, its strategic energy hub, as well as a key transit point for the so-called Middle Corridor (*Ibid.*). Georgia has, moreover, always been a reliable partner, as evidenced by the substantial Turkish investment in the country (e.g. Alberich Lanzos and Gosálvez Frías).

On the other hand, regarding the Azerbaijani and Turkish issue, there is no complete religious alignment, as the faith roots of the Caucasian neighbour are Shia, albeit secular.

Here, the Turkish Republic's approach would be more in line with a 'neo-Turanism' perspective, driven by the active foreign policy of the Organisation of Turkic States (OTS), which is a key element within Türkiye's soft power geopolitical framework. Through the OTS, the Turkish Republic has reaped significant benefits that have strengthened its presence in other organisations of which it is a member.

A significant benefit from the OET has been the increased presence of its foreign or economic activities in the Turkic republics of Central Asia.

The geoeconomy of the Central Asian region is one of the most strategic focal points for Türkiye (e.g. Alberich Lanzos and Gosálvez Frías).

Furthermore, these republics, with the exception of Turkmenistan, are also member states of the Shanghai Cooperation Organisation (SCO), where Türkiye holds observer status (e.g. Rodríguez García-Brazales); there, it shares a seat with several nations, some of which are emerging powers from the so-called 'Global South' and which also form part of the BRICS+. This confirms that the Turkish Republic seeks complementary contexts and frameworks with predominantly Western entities (cf. Duran Cénit); our analysis emphasises that there is a key year for the new foreign policy direction prevailing in today's Türkiye: 2018 (*Ibid.*). This is neither a trivial nor a random choice. Just two years after the attempted coup in mid-July 2016, the Turkish Republic saw its negotiations with the EU stalled, which led it to adopt a more autonomous and diversified stance in foreign relations and to take a greater interest in the BRICS+ (*Ibid.*); just five years before the centenary of the Republic in 1923.

Three generations later, a hundred years after its founding by Mustafa Kemal, Türkiye had ample reason to feel satisfied with its achievements, and particularly with its skilful foreign policy impact during the current 21st century.

But one unresolved issue, which seems to be in a 'perpetual standstill', is the process of accession to the EU; all this despite the relative successes of the reforms carried out during part of the first decade of the 21st century, which nevertheless caused great disillusionment and a certain local weariness in the first half of the following decade (cf. Duran Cénit). There was a clear before and after 2016, particularly when Türkiye became a presidential republic.

The 'soft power' of local soap operas has made quite an impact on many viewers in Spanish society through television channels and streaming services. For years, quietly and gradually, these Turkish series have contributed to a sustained increase in tourism to Istanbul and other parts of the western half of the country. However, this has not translated into closer ties between the civil societies of both countries: 'it is the *orientalising* atmosphere of Türkiye that attracts, not the society' is the conclusion that can be drawn in this regard. It is curious that bad experiences with local taxi drivers have been a much-discussed issue among the

travellers consulted; the main reason for a less-than-ideal stay ('bitter', according to the expression used in several of the cases analysed). But, in short, following the tourist experience of the average Spaniard in the country, there is no widespread sentiment among 21st-century Spanish tourists that it is 'the most unforgettable country' they have visited.

Perhaps this is a key reason why there has not been a strong exchange of civil society between the two nations. And all this despite the traditional geopolitical friendship between the two peoples, or the average Turk's fondness for Spain (e.g. De la Cámara Hermoso). It reminds me of what many foreign experts and residents of the country used to say about its people: 'hospitable yet blunt'. This aspect may seem trivial, but it is the only explanation for the lack of closer Spanish-Western and Turkish ties. We wonder whether the existence of Spanish-Turkish hybrid series or films might have contributed more effectively to this Spanish affinity towards Turkish civil society; thus, greater knowledge of Türkiye's history and reality may contribute to better civil harmony, as might the suggestion of the potential future establishment of certain Spanish-Turkish forums or foundations (cf. De la Cámara Hermoso).

The growing global engagement of the Indo-Pacific economy, the world's epicentre, has led to a corresponding increase in Türkiye's political, diplomatic and economic commitment to this region, and this gradual effort has been embodied since 2019 in the Türkiye Anew initiative, in which the nations of Southeast Asia play an essential role (cf. Rodríguez García-Brazales).

It so happens that the People's Republic of China currently acts as a counterweight to balance Türkiye's dependence on the EU economy, and this suggests the potential future signing of new bilateral treaties with Türkiye, even within an existing economic relationship that is asymmetrical (*Ibid.*)

Japan and South Korea not only maintain a strong economic partnership, but one that is also asymmetrical; furthermore, the Land of the Rising Sun has cooperated with and invested in key projects in Türkiye, such as the Marmaray undersea tunnel (*Ibid.*). Both countries could serve as alternatives for further defence agreements and increased investment with Türkiye in the Pacific region, where Indonesia and Malaysia are otherwise key markets for the Turkish strategy, which is always tailored to each country's specific context (*Ibid.*). Singapore and Vietnam could, in

the not-too-distant future, emerge as a significant component of Türkiye's economic strategy regarding the ASEAN region (*Ibid.*).

The Indian subcontinent presents a high degree of complexity within the framework of Turkish policies regarding the Indian Union (*Ibid.*), and not merely in commercial terms, given that Pakistan maintains a historic alliance, as Türkiye was the first country in the world to recognise Pakistan's independence. On the other hand, the Indian Union is a potential geoeconomic rival for Türkiye (*Ibid.*).

In the context of Türkiye's relations with Latin America and the Hispanic world, given that this region did not previously feature prominently in Turkish geopolitical plans of the 20th century, Türkiye has nevertheless demonstrated excellent use of soft power there through the opening of embassies and a large number of transoceanic flight connections via its flag carriers (*e.g.* Rodríguez Gómez, this volume). And this stands in contrast to another rivalry within the realm of soft power: the telenovelas themselves. It should be remembered that in the past, telenovelas in the Hispanic world were produced in Latin America, where they still compete today.

Until recently, Türkiye had viewed Latin American countries as an opportunity to engage with other 'non-aligned' nations. However, the current US administration's intention to pursue a derivative of the Monroe Doctrine, which entailed the 'reorientation' of the Bolivarian regime of the ousted former president Maduro (one of the main points of connection in Latin America for Türkiye), seems to leave several of Türkiye's geopolitical ambitions for the region up in the air.

Soft power, as a key component of the Republic of Türkiye's foreign policy, is further enhanced by its participation in the 'second space race'—a far more multipolar contest than the former 'space race' that pitted the US and Soviet blocs against each other until 1991. In a sense, the new space race has become a contest between magnates and emerging powers.

However, the issue of human rights in relation to current Turkish geopolitics emerges as another significant concern, given that, according to international indices, in just over a decade it has shifted from being viewed as a 'moderate democracy' to a 'moderate autocracy', with its current political system broadly categorised as 'a competitive authoritarian regime' (*cf.* Rodríguez López), and all this is not a phenomenon exclusive to Türkiye, but

rather part of a global trend where a propensity towards autocracy is undermining democracies (*Ibid.*).

An eternity seems to have passed since the first annual addresses to the United Nations General Assembly held in New York during the time of Abdullah Gül, the former Turkish president; a leader who enjoyed considerable sympathy in certain Western social-democratic circles and who was one of the 'flagship figures' in the launch of the AoC (Alliance of Civilisations) project; yet the international discourse on human rights as a tool for geopolitical ends has not changed for Türkiye. It has gained international prominence in certain forums, becoming a champion of various causes involving Muslim peoples or figures who were persecuted or stigmatised in various parts of the world.

Globally, Türkiye appears to be pursuing a well-considered, sophisticated and diversified economic and energy strategy for each partner or region of the world (*e.g.* Rodríguez García-Brazales).

We are not dealing with an economy based on tourism, Turkish restaurants and construction, as might have appeared to be the case at the start of the century. The current Turkish Republic has managed to diversify its economic prospects very effectively (*e.g.* Alberich Lanzos and Gosálvez Frías), whilst maintaining various foreign policies in parallel (*cf.* Rodríguez García-Brazales).

If we confine ourselves to the geoeconomic aspect, it is evident that Türkiye has had to undertake several reorientations in the 21st century to mitigate as far as possible the internal effects of past economic policies—vulnerable elements that have not always been fully resolved despite the significant expansion of the last two decades (*e.g.* Alberich Lanzos and Gosálvez Frías).

It is concluded that Türkiye's colossal geoeconomic manoeuvre is fundamentally rooted in extensive export-oriented industrialisation, with vast and organised production zones, and that, above all, it does not aim to be self-sufficient, but rather seeks selective integration into regional and global value chains, which in turn pursue specific and well-planned presidential policies (*Ibid.*).

The Republic consistently exhibits significant macroeconomic volatility, due primarily to its heavy reliance on external financing (which Türkiye has invariably sought explicitly) and the private sector's widespread practice of engaging in foreign exchange speculation (*Ibid.*).

Following the pandemic, and after the May 2023 elections, Türkiye, without altering its model, has, as far as possible, implemented new arrangements to restore a degree of normality to the macroeconomic framework (*Ibid.*).

Within the same framework of its macroeconomic stability and industrial strength with significant present and future potential, where Türkiye shows a major weakness is in energy demand, as the Republic has a high degree of external dependence; an Achilles' heel it shares with the People's Republic of China (*Ibid.*). Furthermore, the significant influence of coal within Türkiye's energy mix creates structural friction with the European Union, as it clashes with the 'green deals' (*Ibid.*); an area that Türkiye must take into account regarding the development of a hypothetical future economic and political 'Europeanisation'.

It is commendable that Türkiye has sought complementarity within the industrial framework through the establishment of technology parks explicitly linked to universities and R&D centres (*Ibid.*).

Much of the relationship between Türkiye and Spain is currently based on strong economic performance between the two countries. This is no longer limited to SMEs, as it was several decades ago, but now extends to large companies, generating large-scale contracts.

In the defence sector, Türkiye has emphasised 'know-how' in its contracts.

The economic benefit derived from the military dimension of Türkiye's geopolitics is also a product of that 'diversified flexibility' evident in other areas of trade and economic policy (*cf.* Rodríguez García Brazales; Alberich Lanzos and Gosálvez Frías). For each region, Türkiye has offered a different military 'product': advisers and drones for Africa, drones for Ukraine, or fighter jets for other countries. This is not the result of mere chance but the corollary of a predetermined direction planned by genuine military strategists and economists for a long time, at least since the beginning of this century, drawing on old ideas and having learnt from the experience of what went wrong for the republic in this field during the post-Second World War period.

This long-term reflection on its geostrategy may contrast with the apparent short-term incentives that the Republic of Türkiye might have expected but, in any case, demonstrates a combination of its own identity and interests (*cf.* Duran Cenit, this volume).

Türkiye is a major industrial partner on a global scale. The collaboration and commitment with Navantia have brought significant technological benefits to the Turkish Navy (*cf.* De la Cámara Hermoso). However, on the other hand, the contract for Spain's purchase of and participation in the Hürjet programme, as well as the rumoured interest in the planned fifth-generation KAAN fighters (*e.g.* De la Cámara Hermoso), has nevertheless caused resentment among other Western allies within NATO, who preferred alternative options, such as the F-35. In a way, this might come as a surprise, given that Türkiye has been a very active member of the organisation in terms of personnel and operations since 1952; a structure which is, at the same time, key to reaffirming its own identity and national security (*cf.* Duran Cenit). However, internal developments within this organisation over two generations have led to shifts in political and economic strategy, with officials periodically advocating one proposal or another for each type of hardware or software.

The military commercial and industrial transaction between the Kingdom of Spain and the Republic of Türkiye has been seen, in part, as a *quid pro quo* for the sale of modern F-110 series frigates by Spain to Türkiye. This represents a turning point not only in the increase in the Turkish Navy's maritime military capabilities (following the principles of Alfred Thayer Mahan), but also an alignment of the Kingdom of Spain with Turkish geopolitical principles, and therefore an indirect rivalry with the powers locked in conflict over thalassocracy in the Eastern Mediterranean.

This volume demonstrates that despite Türkiye's 'Atlanticist perspective' (*cf.* Castro Torres), this was a plan devised by the Western bloc during the first Cold War (*cf.* De Castro García), and as such did not constitute an original plan of the Turkish Republic; consequently, Türkiye has understood since the start of this new century that there are other compatible—though not alternative—geopolitical options within its international strategy.

This strategy of seeking alternative fields of foreign action is what might explain Türkiye's outreach to Latin America, which it views as an alternative arena for strategic action, though not a priority one (*e.g.* Rodríguez Gómez).

The competitive and fragmented landscape, as of 2026, may favour the Turkish strategy in Latin America (*Ibid.*), which maintains a low profile yet remains 'present and autonomous', as well

as being well-considered and long-planned; however, despite its focus on the Asia-Pacific region and the challenge posed by the People's Republic of China, on the part of the US, the so-called 'Dulles' doctrine' of its 47th president, with its unpredictable shifts in international strategy, might come to view Türkiye's 'regional aspirations' with a certain degree of aversion (even though these are in reality a peaceful and flexible diplomatic presence) in what the US currently considers 'its natural territory'; all the more so given that Türkiye has had previous strategic agreements or 'mere goodwill visits' with rivals (Brazil) or 'old' local enemies such as Maduro's Venezuela. As emphasised in this study (e.g. Rodríguez Gómez), Venezuela represents a specific case, and a paradigm, not only for the Turkish presence in the Latin American region, but also as an experiment by Türkiye in relation to other countries located in other regions of the globe (*Ibid.*).

The United States of America has openly expressed its aspirations regarding American territories (such as Greenland), which also factor in the seventeen natural elements known as 'rare earths'. Lithium is one of these naturally occurring elements, which are so crucial to the functioning of high technologies and, consequently, to the defence industry (e.g. Rodríguez Gómez). Within this reasoning, the new US administration could view any power seeking to acquire 'key' American rare earths as a competitor and rival.

However, Türkiye's current low-profile foreign policy and actions do not seek to disrupt other powers, and focus on cultural and educational institutions and products relating to Latin America, whilst under no circumstances displaying unpredictability or instability (*cf.* Rodríguez Gómez). Yet, in a sense, it is possible that the vacuum or lack of a coordinated strategic position on the part of Europe and Spain regarding Latin American issues has contributed to the advance of Türkiye's determined foreign policy in the region (*Ibid.*), despite greater linguistic or cultural differences, or 'prior knowledge' of the area. The fact that Türkiye is not perceived as a former colonial power in Latin America contributes in part to this success.

It can be summarised that, in general terms, Türkiye's presence in Latin America is proving to be another success, if we base our assessment on the gains achieved, despite its low-profile stance, particularly given the greater visibility of its foreign policy in territories closer to the national territory of the Republic.

Paradoxically, Türkiye's success in the region presents a Latin American counterpoint to the PRC's more visible and 'more aggressive' expansion in the region (*cf.* Rodríguez Gómez).

The details set out in our report demonstrate that during the first Cold War there was a certain 'Anglo-Saxon perspective'—specifically an American one—which largely shaped Türkiye's relationship with the rest of the world, and which at that time led it much more towards becoming part of European and Western institutions than is the case today.

In the vision of Halidé Elib, formulated during the early days of the Republic, at the height of Kemalist fervour, Türkiye was seen as an integral part of the Western political, cultural and normative sphere, even whilst retaining its historical and civilisational distinctiveness, which must not be diluted (*e.g.* Duran Cénit).

Given all that has been set out in this notebook, and considering its strong Ottoman roots today, I do not believe that we are witnessing an unnatural shift in Turkish geopolitical (and domestic political) frameworks; viewed in this light, it could even be interpreted that Kemalism, with its pro-Western orientation, merely reflected the viewpoint of a large part of the Turkish population for much of the 20th century, following the First World War, and that it was, in a sense, fighting against a local, Eastern-leaning anchor, which seemed to be hidden but which surfaced on several occasions throughout the country's history. Furthermore, it cannot be said that Kemalism has died out, but rather that it has been revived with greater vigour by the political opposition (the CHP was the party founded by Mustafa Kemal Atatürk), and has become a very much living symbol for practically half the population of Türkiye. To a large extent, it may seem that Kemalism is in a state of dormancy, as it is not part of Turkish geopolitics or foreign policy, but domestic developments in the struggle for human rights demonstrate that this is not the case; furthermore, this study emphasises that there are certain continuities throughout the Republic in its aspirations to remain autonomous in determining its own destiny, as a strong power, both domestically and internationally (*e.g.* Duran Cénit).

A logical consequence of the international order that Türkiye continues to pursue is the popular slogan promoted by Turkish President Erdoğan: 'the world is bigger than five', in line with the spirit of some BRICS+ nations, which seek greater power for emerging powers in Africa or Asia. In the same vein, the gains

achieved on both continents by the current Turkish Republic lend great credibility to this established ambition.

As Duran Cénit argues, the current framework and the Kemalist pre-eminence of the past may be complementary frameworks within the current Turkish conception (*cf.* Duran Cénit).

Anyone familiar with the inner workings of the Turkish character knows how disciplined and hard-working its people are, and within that respect for authority one can glimpse a disposition towards military discipline.

The history and geopolitics of Türkiye in the second half of the 20th century were closely linked to unquestioning obedience to NATO principles and the watchful eye of the United States (*e.g.* De Castro García, 2026). In line with these assumptions, for strategic rather than democratic reasons, just as happened with other European regimes (Greece), the various Turkish military coups and interventions that curtailed governments elected at the ballot box were 'tolerated' in geopolitical terms by the Western bloc; yet those very same suppressed civilian powers had themselves restricted civil liberties even before the military uprisings. A clear example is the fate of the DP (Democratic Party) and its prime minister Adnan Menderes in late summer 1961 (*Ibid.*)

There are many shared challenges in the bilateral relationship between the Kingdom of Spain and the Republic of Türkiye, as expressed in this booklet (*e.g.* De la Cámara Hermoso), but despite a rather diverse history in the 20TH century and the present day (*Ibid.*), it is the very same historical circumstances and paradoxes that have brought us closer together through shared interests from various angles (financial, geopolitical), which are those that can shed the most light on a promising shared future.

As Ambassador De la Cámara emphasises (in this volume), both countries have shared characteristics in the articulation of dialogue between continents; not surprisingly, as we noted in the introduction, both countries possess historical territories straddling two continents. A characteristic they share, besides being at opposite ends, is controlling the passages to the Mediterranean (*Ibid.*).

In summary, based on the arguments presented in this volume, Türkiye does not appear to be a Western country, although many of its decisions on the international stage may influence the European Union, and by extension the West.

Hence the logic of always maintaining Türkiye as a priority of state policy: its full accession to the EU.

On the other hand, Spain has served as a source of admiration and a model for Türkiye to emulate (*e.g.* De la Cámara Hermoso), which confers a strategic advantage for Turkish affinity towards Spain. This is another explanation for the republic's demonstrated interest in the Americas (*cf.* Rodríguez Gómez).

But, ultimately, and as emphasised in this volume (*e.g.*, De Castro García; De la Cámara Hermoso), there is currently an opportunity for Spain-Türkiye bilateral relations that could benefit both countries.

Members of the working group

- Chair: **Jesús Gil Fuensanta**
Deputy Director for International Relations, School of Economic Intelligence and International Relations (LaSEI) – Autonomous University of Madrid (UAM). Senior Lecturer in Geopolitics of Africa and Asia, Faculty of Humanities, UNIR.
- Coordinator and Secretary: **José Ignacio Castro Torres**
Infantry Colonel, Spanish Army (Reserve). Associate Analyst at the Spanish Institute for Strategic Studies. Corresponding Member of ACAMI.
- Authors: **Manuel de la Cámara Hermoso**
Former Spanish Ambassador to Türkiye. Member of the Board of Directors of Eurodefense Spain.
- Dr. Manuel J. Gazapo Lapayese**
PhD in International Relations. Analyst of international security and armed conflicts. University lecturer specialising in geopolitics and global terrorism

Carmen Rodríguez López

Deputy Head of the Department of Arabic and Islamic Studies and Oriental Studies. Faculty of Arts.

Cantoblanco Campus, Autonomous University of Madrid.

Andres de Castro García

Senior Lecturer in International Relations. Department of Political Science and Public Administration, Faculty of Political Science and Sociology, UNED. Visiting Fellow, Migration Research Institute, Mathias Corvinus Collegium, Hungary.

Elena Gosálves Frías

Intelligence Analyst at the School of Economic Intelligence and International Relations. Autonomous University of Madrid.

Lucía Alberich Lanzos

Intelligence Analyst at the School of Economic Intelligence and International Relations. Autonomous University of Madrid.

Marien Durán Cenit

Senior Lecturer in the Department of Political Science and Public Administration. Coordinator of the official Master's degree in Strategic Thinking and Global Security. Faculty of Political Science and Sociology. University of Granada.

Rafael Santiago Orti

PhD in International Relations.

Lecturer at the Faculty of Economics and Business Studies at the Complutense University of Madrid.

Dr. Alfredo A. Rodríguez Gómez

Lecturer in International Relations.

International University of La Rioja.

Ángel Rodríguez García-Brazales

Senior Lecturer in Fundamentals of Economic Analysis.

Director of the School of Economic Intelligence and International Relations.

Autonomous University of Madrid.

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