CLINGENDAEL FUTURES
TURKEY AT THE CROSSROADS: EXTERNAL RELATIONS WITH EUROPE, RUSSIA AND THE MIDDLE EAST
DECEMBER 2013
THE FOLLOWING IS THE VISUAL SUMMARY OF FUTURES RESEARCH CONDUCTED ON TURKEY & ITS REGIONAL NEIGHBOURS ON BEHALF OF THE MINISTRY OF FOREIGN AFFAIRS & THE MINISTRY OF DEFENSE OF THE NETHERLANDS.

THIS CONTENT REPRESENTS THE PUBLIC VERSION OF THE TOTAL RESEARCH—DESIGNED AS AN AT-A-GLANCE GUIDE FOR TIME-CRUNCHED POLICY-MAKERS.

THESE SCENARIOS CONSTITUTE PART OF CLINGENDEAEL FUTURES’ UNIQUE RESEARCH DEVELOPMENT PROCESS: THEY ARE ONE FACET OF A SERIES OF DELIVERABLES AND DIALOGUES WITH RESEARCH CLIENTS IN WHICH EACH SCENARIO IS FULLY ELUCIDATED.

IF YOU ARE INTERESTED IN FURTHER INFORMATION ON THIS PROJECT, OR WISH TO WORK WITH CLINGENDEAEL FUTURES, PLEASE CONTACT:

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CAUGHT BETWEEN THREE REGIONS:

THE EUROPEAN UNION

RUSSIA

THE MIDDLE EAST
KEY DRIVERS IN ORDER OF IMPORTANCE:

**POLITICAL DRIVERS**
1. Schism between secularists & Islamists
2. Liminal conception of the state
3. Quest for foreign policy credibility

**SECURITY DRIVERS**
1. Competition between Turkish & Kurdish nationalism
2. Military opposition and co-optation
3. NATO allegiance

**ECONOMIC DRIVERS**
1. Energy dynamics
2. The EU question
3. Import economics

**SOCIO-CULTURAL DRIVERS**
1. Barriers to free expression
2. Aging demography
3. Women & social inequality

**PRIMARY ENGINES OF CHANGE THAT WILL AFFECT TURKEY BY 2020**

**ADDITIONAL EXTERNALITIES THAT MAY AFFECT DRIVERS:**
- Rule of law remains a barrier to foreign direct investment
- Future course of European Union integration
- Geostrategic alterations in Central Asian pipeline politics
- Change in nuclear deterrent position
- Kurdish state carve-out either due to Syrian or Iraqi events
- Populist reaction against Islamist and/or foreign policy direction
INDECISION ON BOTH SIDES: BOTH OLDER, BUT WISER?

THE KEY ISSUE:

THE EUROPEAN UNION

THE KEY ISSUE:

INDECISION ON BOTH SIDES: BOTH OLDER, BUT WISER?

TOP 5 MUTUAL INTERESTS RANKED IN ORDER OF IMPORTANCE:

1. TRADE
   - Trade dominates EU/Turkish relationship, thanks to new global free trade and visa liberalization agreements but EU membership is still a non-starter; Anatolian tigers still shaping politics towards Western allies.

2. SECURITY
   - As budget issues plague NATO’s Transatlantic cohesion, Turkey’s role within collective defense and cooperative security comes under question.

3. ENERGY
   - Turkey remains the critical energy crossroads for Russian resources into European markets; however, price competition from new Western Hemisphere players cuts into Turkey’s role as “pipeline mediator.”

4. POPULIST POLITICS
   - The increasing gap between Turkey’s young liberal constituencies and the conservative Islamist heartland fuels civil liberties crises that challenge closer cooperation with Europe; Gulen Hizmet break with AKP has political consequences.

5. NUCLEAR STANCE
   - As Europe attempts to wind down nuclear energy & develop a common protocol, Turkey forge through with not only a nuclear energy program, but also a potential shift in position on arms as well.

RELATIONSHIP CHARACTERISTICS BY 2020:

- Turkey’s competitive economic growth forces the EU to overcome mutual disillusionment between them; economic ties expressed in the context of a shared common market and limited inclusion in other agreements.
- Turkey remains a NATO member, but both the EU and US no longer trust Ankara’s strategic commitment to the Transatlantic security agenda.
- Turkey’s influence over its diaspora in the EU exacerbates mistrust among increasingly nationalistic EU states; migration and crime from non-Turks transiting through Turkey and on towards the EU also cloud political relations.
### OVERCOMING HISTORIC ENMITY: BUT HOW LONG CAN IT LAST?

**THE KEY ISSUE:**

**TOP 5 MUTUAL INTERESTS RANKED IN ORDER OF IMPORTANCE:**

1. **TRADE**
   - TURKISH & RUSSIAN AGREEMENT TO BOOST TRADE TO $100B IS BOLSTERED BY CONSTRUCTION & ENERGY ARRANGEMENTS; RUSSIA FACILITATES TURKEY’S ENTRY INTO SCO

2. **ENERGY**
   - AMOUNT OF ENERGY EXPORTS TO TURKEY FROM RUSSIA DECREASES AS IRANIAN, IRAQI AND EUROPEAN SOURCING RAMPS UP, WHICH CAUSES SOME FRICITION; MITIGATED BY TURKISH SUPPORT FOR RUSSIAN STANCE ON TRANSCAUCASUS ISSUES

3. **SECURITY**
   - AS TURKEY’S ROLE IN NATO CONSTRICTS, COOPERATION WITH RUSSIA INCREASES IN CERTAIN AREAS, ESPECIALLY WITH REGARDS TO KURDISH AUTONOMY. HOWEVER, THE NAGORNO-KARABAKH ISSUE REMAINS UNRESOLVED AND HAS KNOCK-ON EFFECTS ON ENERGY IMPORTS

4. **NUCLEAR STANCE**
   - RUSSIA AND TURKEY CONTINUE COOPERATION ON NUCLEAR PLANT AT AKKUYU DESPITE CRITICISM; A FACTION WITHIN TURKISH GOVERNMENT ACTIVATES FOR PURSUIT OF A NUCLEAR WEAPONS PROGRAM

5. **POPULIST POLITICS**
   - THE AKP FINDS A SYMPATHETIC PARTNER IN RUSSIA RE: CRACKING DOWN ON POPULIST DISSENT; BOTH COUNTRIES WITNESS GREATER DOMESTIC POLITICAL INSTABILITY

### RELATIONSHIP CHARACTERISTICS BY 2020:

- RUSSIA AND TURKEY ATTEMPT TO MAINTAIN THE DÉTENTE IN THEIR RELATIONS—PRINCIPALLY MANIFESTED IN THE NEGOTIATIONS OVER SYRIA AND ASSAD & IRAQ AND KURDS.
- ALTHOUGH MARKET COMPETITION REDUCES RUSSIAN ENERGY EXPORTS TO TURKEY, TURKEY’S PIVOTAL IMPORTANCE IN TRANSIT FORCES BOTH TO SEEK COMPROMISES
- INTERNAL DOMESTIC AGITATION OVER POLITICAL STATUS QUO PLAGUES BOTH COUNTRIES AND ERDOGAN AND PUTIN SHARE SIMILAR RESPONSES, WHICH CREATES FURTHER BACKLASH
- TURKEY ASSUMES A GREATER ROLE IN EURASIAN POLITICAL DIPLOMACY, ESPECIALLY IN CHECHNYA AND CENTRAL ASIAN REPUBLICS, BUT ARMENIAN ISSUES REMAIN UNRESOLVED
THE MIDDLE EAST

THE KEY ISSUE:
REGIONAL LEADERSHIP:
CAN TURKEY REDEEM ITSELF?

### TOP 5 MUTUAL INTERESTS RANKED IN ORDER OF IMPORTANCE:

1. **SECURITY**
   - The implications of the Syrian Civil War continue to pose strategic problems for Turkey, although its support for the SNC must be tempered; Kurdish issues with Iraq and Iranian nuclear issues shape a transition in Turkish security stances.

2. **SECTARIANISM**
   - The Syrian War underscores frictions with Shia (Alevis) & Kurd communities, but mostly with Jihadists fomenting border security problems; slow creep of Islamism into secularism continues, but with increasing confrontation.

3. **POPULIST POLITICS**
   - After the lessons of supporting the Muslim Brotherhood in the region, Turkey is forced to chart a different course in appealing to populist sentiment; this shapes Turkey’s foreign policy platform as well as its domestic agenda.

4. **ENERGY**
   - Renewed relations with Iran put Turkey on a potential 3-way collision course with Iraq (and consequently, Kurdish nationalists) as it tries to negotiate the best deal that satisfies its increasing need for energy imports (97% of total).

5. **NUCLEAR STANCE**
   - The outcomes of Iran’s rapprochement with the P5+1 have a direct impact on Turkish-US relations and influence a longer term position on nuclear deterrence within the unstable Middle East.

### RELATIONSHIP CHARACTERISTICS BY 2020:

- After the “zero problems with neighbours” strategy failed to provide a solid platform for Turkish foreign policy, the country retreats, regroups and seeks a more measured response in order to avoid the cornered position it encountered when supporting the Muslim Brotherhood and SNC.
- Turkey attempts evenhandedness with regional powers Iran & Syria, and tries to serve a constructive role in Israel/Palestinian talks; however, inconsistencies and new political changes at the domestic level make advances in these areas difficult and slow; as a result, diversion from US/EU policy increases.