



# **CLINGENDAEL FUTURES**

**TURKEY AT THE CROSSROADS: EXTERNAL RELATIONS WITH EUROPE,  
RUSSIA AND THE MIDDLE EAST**

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**Clingendael**

Netherlands Institute of International Relations

**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 CLINGENDAEL 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.**

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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



## 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 CONSTITUTENCIES 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 FORGES 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



**RUSSIA**

**THE KEY ISSUE:**

**OVERCOMING  
HISTORIC ENMITY:  
BUT HOW LONG CAN IT  
LAST?**

**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 RAMP UP, WHICH CAUSES SOME FRICTION; 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 (ALEVI) & 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

**COMMENTS & QUESTIONS**



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