



FIRE AND ICE

The Russian-Turkish partnership

By

Stanislav Secieru, Sinikukka Saari and Dimitar Bechev



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EXECUTIVE SUMMARY

This *Chaillot Paper* provides an in-depth analysis of the Russian-Turkish partnership. It explores the dynamics underpinning the relationship and looks at how it is likely to evolve in the coming years. The ties that bind Moscow and Ankara are a complex tangle involving converging and competing interests and objectives. Several factors explain the Russo-Turkish *rapprochement*. The two countries are drawn together due to their shared authoritarian features, similar strategic cultures and operational codes. Russian-Turkish cooperation is furthermore rooted in economic interdependence, which enhances the domestic legitimacy of both countries' leaders and delivers benefits to businesses and societies at large. Albeit suspicious about each other's intentions, Russia and Turkey view one another as indispensable partners in managing flashpoints in the Middle East and North Africa as well as in the broader Black Sea region. These combined factors help Moscow and Ankara maximise shared interests while keeping conflicts in check.

Despite the resilience and mutually beneficial nature of the Russian-Turkish partnership, the future might bring disruptive change, whether temporary or longer-term. Potential risk factors include the centralisation of power in each country which makes sharp U-turns possible: a change of leadership in either country would inject a high degree of uncertainty into the bilateral relationship at least in the short run. Change might also be induced by shifts in the regional environment which could alter mutual threat perceptions and breed more conflicts. With Russia and Turkey's respective pivots to Asia, the significance of their commercial ties may decline, thus weakening the economic basis of the partnership. The imposition of sanctions or other forms of economic coercion could lead to a sectoral decoupling of the two countries' economies, further undermining one of the pillars which has underpinned relations over the last two decades.

The ramifications of the Russian-Turkish partnership for the EU, an immediate neighbour of both, are multiple. Moscow and Ankara's embrace of authoritarianism runs counter to the EU's promotion of democracy beyond its borders. Moreover, the Russian-Turkish energy partnership weakens Europe's efforts at diversification (though the energy projects that Turkey conducts separately from Russia are beneficial for the EU) and undermines neighbouring countries' efforts to implement reforms and build resilience. Russia's and Turkey's muscular foreign policy backed by military coercion often leads to the EU's agenda in its southern and eastern neighbourhood being eclipsed. The two powers' preference for unilateralism is at odds with the EU's strong commitment to multilateralism.

These challenges mean that Europe urgently needs to rethink how it deals with the Russian-Turkish 'tandem'. First, it will need to take more robust action to limit the scope of hostile activities conducted by both on European soil. Second, the EU should pursue a 'customised' strategy towards Ankara, with which it has a stronger chance of developing productive relations. Third, when necessary, Europe should not shy away from using coercive tools, such as sanctions. Last but not least, a better and more closely coordinated transatlantic response will increase the chances of a successful EU policy towards both Turkey and Russia.

INTRODUCTION

by

**STANISLAV SECRIERU, SINIKUKKA SAARI
AND DIMITAR BECHEV**

The EU finds itself facing two powers on its eastern and southern flanks, Russia and Turkey. Despite high levels of economic interdependence and some shared interests, the EU's relations with both have been quite strained over the last decade; this has been a constant source of disappointment and frustration. In contrast, Russia-Turkey relations, despite bitter episodes of regional rivalry and economic warfare, have recently been blossoming.

During a Valdai Club discussion in late 2020, President Putin commented on his country's relations with Turkey as follows: 'Despite a lot of pressure, we implemented the TurkStream project together rather quickly [...] Erdoğan, who was aware of his national interests, said that we would do it, and we did it. [...] Working with such a partner is not only pleasant but also safe.' Putin lavished praise on the Turkish leader and contrasted their fruitful collaboration with the frustratingly slow and uncertain pace of cooperation with Europe ⁽¹⁾. His uncritical comments raised some eyebrows in the room given quite a turbulent year in Russian-Turkish relations.

In 2020 Russia and Turkey clashed in Syria and Libya. While they ultimately managed to step

back from the brink and avoid a large-scale direct confrontation, the negotiations can hardly have been easy or pleasant. Although Russia and Turkey inaugurated the TurkStream pipeline, Ankara completed the 'Southern Gas Corridor' that delivers Caspian gas to European clients and thus runs against Russia's interests. Turkey assisted Azerbaijan in defeating Armenia, Russia's key ally in the South Caucasus. On the wings of victory, Ankara also began to build

The personal chemistry between the two authoritarian leaders, reinforced by similar strategic cultures, enables them to see eye to eye even on contentious issues.

a military foothold in what the Kremlin regards as its own backyard. After lengthy negotiations, Moscow reluctantly agreed to a joint Russian-Turkish ceasefire-monitoring centre in Azerbaijan. Last but not least, Turkey signed contracts to supply Ukraine with corvettes and attack drones, boosting Kyiv's military muscle and ability to withstand Russia's aggression. In reality, many things that Turkey does in the Middle East and North Africa and in the post-Soviet region are neither

pleasant nor safe from Russia's point of view – and this cuts both ways.

Why is it that both Turkey and Russia, critical of almost any action undertaken by the US and Europe, systematically opt for mitigation and damage-limitation when their interests clash? Why, despite punching each other

(1) The Kremlin, website of the President of Russia, 'Meeting of the Valdai Discussion Club', 22 October 2020 (<http://en.kremlin.ru/events/president/news/64261>).

systematically, do they nevertheless manage to enjoy productive, enduring, and cooperative relations?

Several factors are often cited to explain the Russian-Turkish *détente* and in particular the overall cordial tone of diplomatic exchanges between the top leaderships in Moscow and Ankara. One possible explanation is linked to the personal chemistry between the two authoritarian leaders, reinforced by similar strategic cultures, which enables them to see eye to eye even on contentious issues. According to this interpretation, their authoritarian tendencies and pugnacious foreign policy posture *vis-à-vis* the West has pushed Russia and Turkey into each other's arms. However, personal concord between leaders, shared strategic cultures, the political compatibility between the two regimes as well as shared animosity towards the West cannot alone account fully for the durability of the partnership between Moscow and Ankara. Diplomatic pleasantries and symbolic gestures based on a certain degree of affinity between leaders will not go very far unless the overall relations between states are rooted in solid ground.

Unsurprisingly Putin's praise of Erdoğan at the Valdai Club was related to business deals concluded in the field of energy and arms acquisitions, regardless of third parties' attempts to derail them. Thus, a second possible explanation for the Russian-Turkish *rapprochement* is linked to the economic dimension of this relationship. Undoubtedly, the partnership in the economic realm has been profitable for both sides. However, bilateral economic as well as strategic relations took off long before Putin and Erdoğan fell out with the West. Moreover, despite substantial growth, bilateral economic exchanges have never got even close to the level of trade relations with the EU. If only the economic factor is considered, the EU's relations with Russia and Turkey should be in much better shape than they are today.

We should be careful not to overemphasise the importance of economics in the case of leaders who actively practise geopolitics and believe that their countries have a unique civilisational role in their post-imperial spaces. The

third explanation is related to Russian-Turkish competition and cooperation in both their immediate and more distant neighbourhoods, such as the Western Balkans, Middle East and North Africa as well as the broader Black Sea region and Central Asia. This sort of interaction is as much about geopolitical goals as economic dividends. Being present across all those theatres and capable of being mutually obstructive, Moscow and Ankara simply cannot ignore each other; they have to engage in dialogue and coordinate. Sometimes they team up to sideline or displace common rivals, such as the US or Europe.

Rarely does a single set of explanations provide answers to the entire puzzle of multidimensional bilateral relations. The Russian-Turkish partnership is no exception. This is even more the case because both Moscow and Ankara combine imperatives of domestic politics with foreign policy goals, connect the distant past with the politics of today, seek financial advantages but also geopolitical gains, and make linkages between regions when they engage in forceful give-and-take diplomacy. Thus, to build a comprehensive and nuanced picture of Russian-Turkish relations this paper will critically examine and draw insights from all three clusters of explanations.

The goal of this *Chaillot Paper* is threefold. First, the paper seeks to explain what holds Russian-Turkish relations together despite clashing interests and increasingly contentious regional agendas. Second, it proposes to explore not only the past and present, but also to map the future prospects of this partnership. Third, this volume aims to analyse the repercussions of the Russian-Turkish partnership for Europe's strategic interests.

The paper puts forward three core arguments. First, Russian-Turkish relations are a curious mix of fierce competition and close cooperation; both sides have learned, sometimes the hard way, how to make the most out of this uneasy dichotomy. Second, the partnership is sufficiently resilient to endure in the years to come. This does not mean however that it cannot come under pressure due to either exogenous or indigenous factors; therefore the future

trajectory of this relationship will not necessarily mirror its past. Finally, Russian-Turkish 'cooperative rivalry' is an open challenge to the EU but it also creates some opportunities for Europe: a smart combination of pushback, leveraging and engagement could widen cracks in the Russo-Turkish partnership, and in time place the EU in a more advantageous position than it is now *vis-à-vis* Moscow and Ankara.

The paper is structured as follows. The first chapter identifies similarities and differences between the domestic regimes and foreign policies of the two countries. This is not a purely theoretical exercise; the chapter seeks to unveil which features and issues bring them closer or alternatively stoke competition between them as well as decipher what the mesh of similarities and dissimilarities between Russia and Turkey means for Europe. The second chapter sheds light on the economic drivers of Russian-Turkish bilateral relations and examines their consequences for Europe. Given the multi-regional dimension of the partnership, the next three chapters explore Russian-Turkish rivalry and cooperation in the Middle East and North Africa, the Western Balkans and in the region stretching from the Black Sea to the Caspian Sea. These chapters will also seek to explore implications for the EU's interests in both its immediate and distant neighbourhoods. The *Chaillot Paper* concludes with key findings and recommendations on how the EU could better handle the challenges posed by the Russian-Turkish partnership.

CHAPTER 1

RUSSIA AND TURKEY COMPARED

Conflictual camaraderie

by

**STANISLAV SECRIERU, DIMITAR BECHEV
AND SINIKUKKA SAARI**

International relations theory posits that similarities between states facilitate cooperation. Russia and Turkey seem to confirm this theory as they resemble each other while having also forged close ties. But a closer look reveals a more nuanced picture: it is precisely their similarities that create potential for conflict between the two. Two questions arise from this paradox: firstly, are Turkey and Russia more similar than not, and secondly, does this mean more conflict or more cooperation? Finally, we look at what this means for Europe.

SO SIMILAR: WHAT RUSSIA AND TURKEY HAVE IN COMMON

Russia and Turkey resemble each other in many ways: their political system, their economic

governance, their foreign policy, and their geopolitical self-perception all display a number of commonalities.

On the domestic front for instance, in both Russia and Turkey authority is concentrated in the hands of two individuals who dominate decision-making. They have managed to neutralise or corner the opposition through a mixture of co-optation and repression. In both regimes, political power is exercised and allocated through informal networks based on personal and group loyalty rather than through the regular institutional channels⁽¹⁾. The courts are subservient to executive fiat, particularly in cases where the political stakes are high. Civil society and the media have been muzzled and demoralised, or rendered politically irrelevant with tactics ranging from the instrumentalisation of identity cleavages and societal divisions to outright repression.

There are also similarities with regard to economic governance. Economic resources – in

(1) Hale, H.E., *Patronal Politics*, Cambridge University Press, Cambridge, 2014; Massicard, E. and Watts, N.F., *Negotiating Political Power in Turkey: Breaking up the party*, Routledge, London, 2012.

the form of subsidies or public contracts – are allocated on the basis of proximity to the leader and the party in power, rather than in an open bidding system ⁽²⁾. Clientelism and corruption thrive under personalistic regimes, in countries where institutions have historically been weak; Russia and Turkey are not exceptions to this rule.

Both regimes make extensive use of anti-Western nationalist rhetoric, scapegoating the US and to a lesser degree Europe, to mobilise grassroots support. Putin and Erdoğan present themselves, through state propaganda and a subservient and tightly controlled media, as father figures for their respective nations as well as guarantors of their aspirations to socio-economic modernisation and elevated status on the international stage.

Besides domestic similarities, there are more commonalities in strategic cultures and foreign policy conduct. Ankara and Moscow regard themselves as sovereign centres of gravity in international affairs. In their diplomatic discourse both sides emphasise sovereignty as one of the cornerstones of international relations. Their discourse on sovereignty is intimately linked to how Moscow and Ankara position themselves *vis-à-vis* the West. Russia – and also increasingly Turkey – strive for greater self-sufficiency and autonomy from the US and Europe, who are perceived as a threat to the domestic political order and seeking to stifle the great power aspirations of Russia and Turkey ⁽³⁾. Russia's and Turkey's aspiration for greater autonomy from the West has led both to reach out to China, the rising star in the great powers' league.

Determination to craft an independent foreign policy goes hand in hand with the desire to

wield influence in multiple regional theatres. Russia and Turkey's actions signal that great power status entails presence across a variety of geographical settings. Both seek a privileged role in the post-imperial space and in parallel pursue an activist foreign policy in more distant regions too. Such ambitions motivate both sides to portray themselves as bridges connecting Europe with Asia. In this context, the two countries leverage their geographical position to advertise and build transportation infrastructure, which will sustain growing trade exchanges on the Europe-Asia axis.

Both Russia and Turkey portray themselves as rising powers. They are eager to show that they have put the difficult 1990s – a decade marked by economic and political turmoil – behind them. Their assertive posture also means that they are recovering a status and prestige on the international stage that they lost in the recent or distant past. They both see their increasing status as an affirmation of an emerging multipolar world in which the West is declining while 'the rest' are rising.

The two countries use civilisational discourse to buttress their claims to great power status. Russia and Turkey claim to be independent civilisational poles with a rich and distinct history and culture. Since the mid-2000s the Russian leadership has been promoting the notion of a 'Russian world' (*Russkyi Mir*). Ankara initially peddled the idea of a Turkic world in the early 1990s; but under the rule of the Justice and Development Party (AKP) this gave way more to the notion of Turkey as the leader of the Islamic world and guarantor of the Muslim populations living in former Ottoman lands (sometimes described as Neo-Ottomanism) ⁽⁴⁾. As a result, quite often Moscow and Ankara use a blend of history and religion to legitimise foreign policy

(2) Ahval, 'Turkey palace-builder wins Russia contract during Erdoğan visit', 9 April 2019 (https://ahvalnews.com/turkey-russia/turkey-palace-builder-wins-russia-contract-during-erdogan-visit?language_content_entity=en).

(3) President of Russia, FSB board meeting, Moscow, 24 February 2021 (<http://kremlin.ru/events/president/transcripts/65068>).

(4) Davutoğlu, A., *Stratejik Derinlik, Türkiye'nin Uluslararası Konumu [Strategic Depth: Turkey's International Position]*, Kure Yayınları, İstanbul, 2001.

actions ⁽⁵⁾. They have also developed instruments to uphold their civilisational discourse. In support of its *Russian world* vision, in the mid-2000s the Kremlin set up a network of foundations around the world with the aim of building ties with Russian-speaking communities. Turkey established the Turkish Cooperation and Coordination Agency (TIKA) in 1992 which initially targeted Turkic countries but later on shifted to the Muslim world more broadly, from Bosnia to Somalia. It works with other public bodies such as the Directorate of Religious Affairs which supports Muslim communities across the globe.

Quite often Moscow and Ankara use a blend of history and religion to legitimise foreign policy actions.

In their pursuit of foreign policy goals Russia and Turkey rely on coercive tools too, both traditional and non-conventional. During the last decade, they expanded the geography of their military bases abroad, deployed armed forces, but also relied on local proxies and hired guns. In digital space, they resorted to cyber warriors and trolls. In many cases, it was Russia who showed the way, and Turkey successfully replicated the Kremlin's playbook.

Foreign policy in Russia and Turkey is a highly personalised and centralised affair. Presidents Putin and Erdoğan are in control; successes abroad help to sustain the charismatic legitimacy of both leaders at home. The political and strategic elites in both states embrace and practise *realpolitik* and believe in power balance as an organising element in international relations. Moscow and Ankara have both demonstrated a predilection for using military power backed up by assertive diplomacy.

Both parties use tit-for-tat tactics in their foreign policies. Accordingly, attempts to constrain their action are often met with a pushback or counter-escalation, which may be frontal or directed against rivals' interests

in other regions. Yet, failure to push back is regarded not only as weakness but also an invitation to rival powers to exercise more pressure and demand extra concessions. Finally, a divide-and-rule approach forms an integral part of Russia and Turkey's playbook too. The Kremlin resorts to divide-and-rule strategies

to offset the power asymmetry with the EU and NATO and thus deal with individual states bilaterally. At the same time, Erdoğan applies the same tactic in relations with Europe too.

In sum, the two, at least superficially, have a lot in common.

YET SO DIFFERENT

However, the similarities between the Russian and Turkish regimes should not be exaggerated: their political histories and systems are profoundly different, while there are also significant differences in several key aspects of their economies, national ideologies and even in how they relate to the West and China.

First of all, Turkey has a stronger democratic legacy than Russia. Turkey has had a multi-party system and competitive elections for around 70 years. From the early 1960s, until the ascent of the AKP in 2002, it was run by coalition governments which were constrained by the bureaucracy and by the military which staged a series of *coups*. Russia, the core of the Soviet Union, represented the classic Communist party-state defined by an all-encompassing ideology and state dominance over society. Pluralism surfaced during the *perestroika* of the late 1980s but lasted only a decade, thereafter succumbing to a more authoritarian model of politics.

(5) al-Arabiya, 'Russian church: The fight in Syria is a "holy war"', 30 September 2015 (<https://english.alarabiya.net/News/middle-east/2015/09/30/Church-says-Russia-fighting-holy-battle-in-Syria>); Al Jazeera, 'Erdoğan: Protecting Jerusalem a Muslim obligation', 29 November 2016 (<https://www.aljazeera.com/news/2016/11/29/erdogan-protecting-jerusalem-a-muslim-obligation>).

The second difference concerns the role of the executive and the balance between it and other branches of power. Even in the 1990s, Russian politics was dominated by the figure of the president, whose authority has been enshrined in the constitution adopted in 1993. Putin inherited a model where the Kremlin is an arbiter among different power lobbies but recast the balance in his favour, removing influential oligarchs and seizing their assets. The 2020 constitutional amendments have only reinforced the already powerful position of the president. Turkey transitioned to a similar governance set-up only in the mid-2010s when Erdoğan moved from the prime minister's office to the presidency and later on altered the constitution. Previously, the Turkish parliament played a central role in the political arena, a far cry from the rubber-stamp functions of the Russian Duma. Even under the current regime in Turkey, the prospect of an opposition-controlled legislature – which is not a far-fetched possibility, even if the political playing field is skewed in Erdoğan's favour – presents a problem for the authoritarian leadership.

Turkey is therefore a competitive authoritarian regime ⁽⁶⁾, while Russia can be described as a consolidated autocracy. Turkish elections are contested and, as the 2019 local polls demonstrated, the opposition has a chance to win. In the Russian context, the Kremlin opponents' chances are much bleaker and repression methods harsher.

The economies in Russia and Turkey differ in many respects. The Russian economy is largely based on the export of natural resources, while Turkey relies more on the export of industrial goods and services as well as on

domestic consumption and public investment. State companies dominate the Russian economy; whereas in Turkey despite the presence of big influential businesses, the small and medium-sized enterprise (SME) sector is the main employer, exporter and contributor to GDP ⁽⁷⁾. In terms of economic freedom, Turkey is ahead of Russia ⁽⁸⁾; in terms of currency reserves, Russia surpasses Turkey by far ⁽⁹⁾. Overall, the Russian economy is less open but more stable; the Turkish economy is more open but more vulnerable to external shocks and reversals of foreign investment.

Another distinctive feature worth highlighting is national ideology. The presence of large non-Russian communities and Islam's position as a *de facto* second state religion leads to a framing of Russian nationalism in state (*rossiyskiy*) rather than strictly ethnonational (*russkiy*) terms. This conception is essential to Moscow's claim to primacy in the post-Soviet region where populations still speak the Russian language and are exposed to Russian culture. The Republic of Turkey, by contrast, has been conceived and constructed as an insular

national state, surrounded by hostile neighbours. Turkishness was defined in strictly ethnon linguistic terms and minority identities suppressed until recently. Though in the 1990s Ankara sought to propagate the idea of Turkishness in the post-Soviet region, later this approach was deprioritised, albeit not totally discarded. The AKP's shift of focus to Sunni Islam and the legacy of the Ottoman empire allows

for a more inclusive definition which has yet to prove its potency.

One should also be mindful of variations regarding linkages to the West and how these are

Turkey is a competitive authoritarian regime, while Russia can be described as a consolidated autocracy.

(6) Levitsky, S., *Competitive Authoritarianism: Hybrid Regimes After the Cold War*, Cambridge University Press, Cambridge, 2011.

(7) The Union of Chambers and Commodity Exchanges of Turkey, 'SMEs in Turkey' (<https://www.tobb.org.tr/KobiArastirma/Sayfalar/Eng/SMEsinTurkey.php>).

(8) The Heritage Foundation, 2021 Index of Economic Freedom, 'Country Rankings' (<https://www.heritage.org/index/ranking>).

(9) Knoema, 'Foreign exchange reserves' (<https://knoema.com/atlas/topics/Economy/Short-term-indicators/Foreign-exchange-reserves>).

reflected in the domestic arena. Turkey transitioned to a flawed democracy as it aligned more closely with the United States and Western Europe, courtesy of NATO and the association with the European Economic Community (EEC) leading up to the Customs Union of 1995. Until the late 2000s, the EU accession perspective drove domestic reforms (e.g. the abolition of the death penalty, the curbing of military control over political decision-making, improvements in minority rights). Despite the subsequent stalemate in the membership talks and Turkey's turn to authoritarian rule, the EU continues to play a central role as a trade and investment partner for Turkey. As Erdoğan's current overtures geared towards a reset with Europe suggest, the EU is not irrelevant to the country's politics.

Russia sees NATO as the ultimate enemy and has a sizeable but less sophisticated trading relationship with the EU. Despite complaints of Western interference in Russian domestic politics, US and European involvement has never been as intense as in the Turkish case. Russia has not been subjected to far-reaching EU conditionality and its security sector has not been closely intertwined with NATO. The prominence of Western non-governmental organisations (NGOs) in the 1990s and the role played by foreign governments in key events (e.g. the bailout of 1998) provided the West with leverage in Russian affairs but to a more limited extent.

In the foreign policy realm, Ankara and Moscow regard themselves as sovereign centres of gravity in international affairs but for different reasons. Russia's claims to such status are underpinned by the vastness of the territory it controls, the extensive natural resources it contains, the size of its population, veto power in the UN Security Council, and nuclear arsenal. For Turkey the status derives from the country's geostrategic position between Europe and Asia, growing population, economic and military prowess as well as membership in exclusive international forums (G20). Thus, Russia's self-perception and ambitions are much more global in nature than those of Turkey.

Although both have pivoted to China, Russia, who shares a long border with the Asian giant, began investing in and developing the partnership much earlier than Turkey. Hence, despite the recent trade boom between Ankara and Beijing, Russia's partnership with China is substantially bigger, wider and deeper than the Sino-Turkish one. Areas of joint collaboration range from trade to military exercises, exchanges in authoritarian best practices, co-operation in the UN on global dossiers as well as joint norm-making efforts at the international level.

Alliances remain an important instrument in the toolkit of both Moscow and Ankara, but the nature and the use of those differs in each case. The Kremlin regards formalised alliances as an attribute of great power. Alliances to which Russia belongs are asymmetric in nature and provide Russia with a platform to claim regional pre-eminence, speak on behalf of allies internationally and avoid the perception of being isolated on the international stage. On the other hand, Turkey is a member of NATO, a club it does not dominate, but nonetheless influences. Ankara relies on the Atlantic Alliance's security guarantees although it often defies other members. Turkey is not a member of the EU but has a very close economic relationship with it. Thus, Turkey struggles to tread a delicate balance between its aspirations to go it alone as a great power and imperatives to maintain its membership of NATO and linkages with the EU, as both are crucial for its security and economic development.

In sum, the two differ on a number of crucial dimensions: their similarities are matched by their differences.

WHAT BREEDS COOPERATION?

Similarities have made it easier for Russia and Turkey to cooperate: this much is obvious. Unlike in liberal democracies, the Russian and Turkish leaderships face fewer constraints

Russia and Turkey: commonalities and differences

COMMONALITIES

- > Personalisation and over-concentration of political power
- > Weak institutions and powerful informal networks
- > Economic clientelism and widespread corruption
- > Anti-Western nationalism
- > Sovereign centres of gravity
- > State-civilisation
- > Autonomy from West
- > Pivot to China
- > Bridge between Europe and Asia
- > Privileged role in former imperial space
- > Low threshold for use of force
- > Tit-for-tat logic

Politics



Economy



Identity politics



Strategic culture/foreign policy



DIFFERENCES

- > Consolidated autocracy vs competitive authoritarianism
- > Short-lived pluralism vs strong democratic legacy
- > Resource-based economy vs value added manufacturing and services
- > Dominance of state companies vs prevalence of SMEs
- > Semi-closed economy vs open economy
- > State nationalism vs ethno/religious nationalism
- > Global vs regional power
- > Multidimensional partnership with China vs booming trade with China
- > Asymmetric alliances vs symmetric alliances
- > More autonomy vs less autonomy from West

domestically in their pursuit of their respective foreign policy agendas. Therefore, a bilateral deal once agreed has little chance of being derailed by public opinion or civil society. There is also strong determination to resist external pressure to ditch any such deals. This feature enhances the credibility of both actors and smoothens relations between them. This may partially explain why Putin has described engagement with Erdoğan as ‘safe’ ⁽¹⁰⁾.

Furthermore, the concentration of decision-making authority means not only less domestic resistance to foreign policy, it also conditions faster decision-making. The Russian and Turkish governments do not need to foster consensus or engage in lengthy preparations of the public for what will come. Weak domestic accountability means that foreign policy actions can be legitimised *post factum*. Indeed,

lately both have been playing ‘speed chess’ in the Middle East and North Africa and the South Caucasus and this has brought them together despite their divergent regional interests.

The designation of external enemies to boost legitimacy at home is another common tactic used by Moscow and Ankara. Because the target of such scapegoating is often the West, their messaging reinforces each other’s narratives (e.g., accusations of Western interference in domestic affairs). More than that, the perception that the West represents a danger for the respective domestic regimes fosters a climate of ‘authoritarian concord’ between Moscow and Ankara, which not only ensures certain similarities in discourse but also reinforces solidarity in action.

(10) ‘Meeting of the Valdai Discussion Club’, op.cit.

Finally a militarised foreign policy accompanied by a transactional approach creates favourable conditions on the ground for Russian-Turkish diplomacy in the overlapping neighbourhoods. As counter-intuitive as it may seem, the mixture of use of force and tit-for-tat tactics demonstrates each power's determination to stand its ground and prove its indispensability to the other for managing regional crises. This combination has laid the ground for targeted cooperation between the two sides in the Middle East and North Africa and the South Caucasus.

Somewhat paradoxically at first sight, not just similarities have promoted cooperation, differences have, too. President Putin for instance is less vulnerable and has much wider room for manoeuvre domestically than his Turkish counterpart. Erdoğan still operates in a competitive and not always safe political environment, in which his political survival is not necessarily assured. This distinction has co-determined Russian-Turkish relations, sometimes bringing them closer. For example, when Erdoğan faced down the attempted *coup d'état* in 2016, President Putin was among the first leaders to call and express his support. This gesture served as an additional factor that helped the two countries to mend relations in the aftermath of the crisis triggered by Ankara's downing of a Russian fighter jet in 2015.

The different structures of their economies have shaped bilateral relations as well. This disparity has meant that they are not locked in a competitive relationship in the economic arena and has driven expansion of trade exchanges. Russia provides wheat and energy resources to Turkey, while Turkey in return exports fruit, vegetables, industrial goods and services to Russia. Trade with Turkey has been favourable for Russian state-owned companies, which dominate economic activities in Russia. Trade with Russia has been beneficial for big enterprises in Turkey, but also SMEs (e.g. the hospitality industry).

Russia and Turkey perceive themselves as great powers. However, there is a certain asymmetry between them: Turkey is not Russia's equal by any metric. Nevertheless, this disparity

facilitates cooperation. That has been visible in recent years where Moscow has presented Ankara with a series of *faits accomplis* (e.g., the annexation of Crimea and military intervention in Syria). Because of this perceived asymmetry, Russia feels more comfortable in dealing with Turkey and sees it as less threatening than the West. For Ankara in turn, pairing with Russia brings bonuses too; cooperation with Moscow is another way to accede to the great powers' league and proof that it is a power centre in itself.

The fact that Turkey is part of NATO and Russia is not, should have been a problem; but in actual fact, it reinforces the relationship. In this context, Moscow sees that Turkey's approach has shifted considerably: it has sought more autonomy within NATO and has conducted its foreign and security policy independently of – and often in defiance of – US preferences. By fostering the partnership with Turkey and playing along with its ambitions to be a great independent power, the Kremlin spurs an emboldened Ankara to actions which will widen cracks in the alliance. In its relations with Turkey and NATO, Moscow replicates the bilateralism it applies to its relations with the EU in order to dilute internal consensus and encourage member states to engage with Russia individually. In its turn, Turkey seeks to increase its standing inside NATO as the only member capable of talking with Russia while at the same time keeping Russian power in check in the regions where allies were reluctant to commit or have been dislodged by Moscow.

... AND WHAT BREEDS CONFLICT?

The various similarities and differences identified above as conducive to cooperation are in reality generating dual dynamics; while encouraging unity, they are breeding tensions and conflicts as well. Speed of decision-making and action has not only united Russia and Turkey in outmanoeuvring other powers, but has also occasionally provoked tensions along the

way. In several instances, Moscow and Ankara have tried to leverage speed to get ahead of each other, which has heightened tensions and increased escalatory risks in conflict areas. The surprising speed with which Azerbaijani forces backed by Turkey were advancing against Russia's ally Armenia in 2020, during the second Nagorno-Karabakh war, prompted Moscow to expose Turkish involvement in the war and bomb Ankara's allies in Syria ⁽¹¹⁾.

Scapegoating the West for domestic problems and foreign crises has cemented the Russian-Turkish partnership. But that raises the possibility of Moscow and Ankara applying similar tactics against each other. In late 2015 when Turkey downed a Russian fighter jet over the Turkish-Syrian border, the Kremlin demoted Ankara from a privileged partner to a public enemy. President Putin described the incident as a 'stab in the back', while the Kremlin's media machine attacked Erdoğan's family and accused Turkey of supporting the so-called Islamic State in Iraq and Syria (ISIS) ⁽¹²⁾. Ultimately, relations were repaired; but the precedent was set and scars remained. Later, the Turkish state broadcaster decided to set up an online Russian language news platform to combat 'disinformation and manipulation' ⁽¹³⁾. The next round of information warfare between the two may prove to be more intensive.

Their respective ambitions to serve as economic bridgeheads connecting Europe and Asia place Russia and Turkey more often than not in opposite camps. In terms of transportation infrastructure Russia and Turkey are competitors rather than partners. Both promote their own role as links between Europe and Asia in order

to benefit financially from the Belt and Road Initiative (BRI). In the energy field, interconnection projects make Russia and Turkey simultaneously collaborators (Russian pipelines transit Turkey) and competitors (Turkey hosts pipelines rivalling Russia's). Therefore, this bridge-like logic only reconfirms the hybrid nature of the Russian-Turkish partnership, where both sides work together but also engage in acute competition.

In the foreign policy realm, both countries' tendency to portray themselves as civilisations has been problematic for bilateral relations. Unlike in the case of nation-states, the borders of civilisations are not clearcut. In the case of Russia and Turkey, their respective spheres of civilisational influence often overlap; this feeds mutual suspicion and from time to time puts bilateral relations under strain. The overlap of neighbourhoods in which Russia and Turkey operate, but also growing convergence of tools and tactics used by both powers to advance their regional ambitions, have meant not fewer, but more tensions. So far, each episode of escalation has been successfully de-escalated and managed by both country's political leaderships, not least because of each other's credibility in terms of threats to act and resort to retaliation measures.

And not just similarities have had conflictual potential; differences have, too.

Erdoğan's more vulnerable position at home compared to Putin allows for a degree of stability in Russian-Turkish relations, but also contributes to conflict. For example, internal considerations influenced Erdoğan's response

Scapegoating the West for domestic problems and foreign crises has cemented the Russian-Turkish partnership.

(11) TRTworld, 'Is Russia attacking Syria's Idlib to distract Turkey from Azerbaijan?', 27 October 2020 (<https://www.trtworld.com/magazine/is-russia-attacking-syria-s-idlib-to-distract-turkey-from-azerbaijan-40950>).

(12) BBC News, 'Turkey downing of Russia jet 'stab in the back' – Putin', 24 November 2015 (<https://www.bbc.com/news/world-middle-east-34913173>); RT, 'Ankara's oil business with ISIS', 25 November 2015 (<https://www.rt.com/business/323391-isis-oil-business-turkey-russia/>).

(13) RFE, 'Turkish State Broadcaster Launches Russian Channel To Fight "Disinformation And Manipulation"', 24 May 2020 (<https://www.rferl.org/a/turkey-russia-media-erdogan/30631868.html>).

to the offensive conducted by Russian proxies in Idlib, among which the rise of anti-refugee sentiment and need to prevent a new wave of refugees crossing the border from Syria ⁽¹⁴⁾. Thus, Idlib for Erdoğan is not about only foreign policy but also about averting a blowback which could weaken his domestic standing.

Differences in terms of bilateral economic engagement have shaped state-to-state relations too. Turkey is represented on the Russian market by a variety of commercial actors, big businesses as well as SMEs, while it is mostly big state-run Russian companies that operate in Turkey. Moreover, Turkey cannot quickly replace the main items it imports from Russia (pipeline gas), while Russia can dispense with or relatively swiftly replace Turkish imports (foodstuffs, electrical appliances, tourism services). This economic algorithm has strengthened the power asymmetry between the two, placing Russia in a stronger position. In a few instances, Russia has slapped Turkey with economic sanctions to obtain geopolitical advantages. And the imperative to keep the Russian market open for Turkish goods and services, as well as the need to protect numerous private companies, has forced Turkey to seek first a way out of economic warfare.

The dissimilar versions of nationalism that prevail in both countries have not co-existed well, feeding tensions and mistrust. In the 1990s Russian nationalism competed on a normative level with pan-Turkism in the post-Soviet region, as both Moscow and Ankara often targeted the same audience to boost soft power. Moscow even feared that pan-Turkism might exert appeal for Russian Muslims in the North Caucasus and Volga region. These fears proved to be overblown however. From the late 1990s onwards, Ankara de-emphasised Turkishness and Russia's suspicions about Turkey's agenda subsided. Nevertheless, Moscow observes

the re-emergence of political Islam in Turkey with some concern. Its eventual fusion with pan-Turkism, which might undergo a revival due to the influence of the Nationalist Action Party (MHP) which is now part of Erdoğan's governing coalition, is deemed as a potential threat to Russia's security and territorial integrity ⁽¹⁵⁾.

IMPLICATIONS FOR THE EU

The numerous commonalities and differences presented above have multiple consequences for the EU. Authoritarian consolidation in two big and populous states such as Russia and Turkey is bad news for the cause of democracy worldwide and runs against the EU's values and interests. Imitation is widespread in international politics and one should not underestimate the power of example for rising authoritarian rulers around the world. From a strategic perspective, the EU is flanked to the east and south by two assertive authoritarian regimes, which makes the environment around Europe's borders more perilous and challenging. Clearly, the EU would prefer to be surrounded by and to deal with like-minded democratic powers than with authoritarian leaders who draw their legitimacy from anti-Western rhetoric and actions.

The authoritarian drive in Russia and Turkey clearly has implications for the EU, directly affecting Europe's security and economic interests. In both countries, a politically controlled judiciary not only seeks to suppress and stifle the domestic opposition, but often targets the interests of European investors ⁽¹⁶⁾. The imperative to silence the opposition or perceived 'enemies of the state' often emboldens Ankara

(14) Sanderson, S., 'Anti-refugee sentiments in Turkey at all-time high', InfoMigrants, 29 July 2019 (<https://www.infomigrants.net/en/post/18466/anti-refugee-sentiments-in-turkey-at-all-time-high>).

(15) Kortunov, A., 'Recep Erdoğan in a Russian Minefield', RIAC, 2 October 2020 (<https://russiancouncil.ru/en/analytics-and-comments/analytics/recep-erdogan-in-a-russian-minefield/>).

(16) 'Executive's arrest threatens Franco-Russian trade, business chiefs warn', *Financial Times*, 30 April 2019 (<https://www.ft.com/content/140cd0a8-6a8e-11e9-80c7-60ee53e6681d>); <https://www.theguardian.com/world/2018/jul/12/turkish-government-taken-to-international-tribunal>).

and Moscow to pursue transnational repressive practices in Europe⁽¹⁷⁾ While acting separately from each other in this matter, the cumulative negative effects can be high for multilateral cooperation (e.g., abuse of Interpol's 'red notice' system).

The exclusionary brands of nationalism advanced by Moscow and Ankara are not good news for Europe either, as their propagation weakens its political and societal fabric. Both regimes use a nationalistic discourse to try to influence Turkish or Russian diasporas in Europe and mobilise support for an anti-EU populist agenda⁽¹⁸⁾.

The economic aspects have significant ramifications for Europe. First, clientelism and corruption in both states have affected the EU's interests; EU funds have been misused in Turkey while Russia has tried to gain political influence in Europe through shadowy business deals⁽¹⁹⁾. Second, the high degree of integration of the Turkish economy in the European market makes it more vulnerable to sanctions imposed by the EU. This is not to say that Russia's behaviour has not been affected by sanctions, which for example helped to contain the area of fighting in Donbas. But the structure of its exports to the EU (dominated by mineral commodities) and large currency reserves helps Russia to cushion the impact of such restrictive measures. Third, in theory, the ambition of both Russia and Turkey to become connectors between Asia and Europe should serve the EU's economic interests. And the competition between them in this field is good for Europe. However, both powers' tendency to leverage these economic linkages for political gain

jeopardises the EU's capacity to act autonomously in future.

The great power aspirations shared by Russia and Turkey challenge the EU's strategic interests. Both actively promote the use of hard power in international relations, which is antithetical to how the EU perceives itself and to its conception of how the global order should be organised. While the EU espouses multilateralism and a rules-based global order, for Russia and Turkey multipolarity and power balance are the keys to international order. Russia and Turkey often act as revisionist powers, unhappy with the current *status quo* and actively seeking to reshape it in their own image. This approach contributes to weakening the role of the EU, and to its marginalisation or gradual exclusion from regional affairs.

The Russian-Turkish partnership highlights and asserts the importance of hard power in the neighbourhood – the dimension of power at which the EU does not excel. The historical and religious discourse utilised by Moscow and Ankara often seeks to foster and embolden exclusivist communities and thus undermines the EU's message of openness and inclusiveness. On the positive side, Turkey's growing profile as a humanitarian assistance player may provide more scope for cooperation between Europe and Turkey.

A certain overlap in Russian and Turkish foreign policy operational codes do raise challenges for Europe. Swiftly executed and often covert actions on the part of Russia and Turkey give them the first mover advantage and frequently wrongfoot the EU in the neighbourhood. Diplomacy backed by military force puts Europe in

(17) The World, 'Expulsions, pushbacks and extraditions: Turkey's war on dissent extends to Europe', 23 July 2020 (<https://www.pri.org/stories/2020-07-23/expulsions-pushbacks-and-extraditions-turkey-s-war-dissent-extends-europe>); UK Foreign & Commonwealth Office, Ambassador Karen Pierce, UK Permanent Representative to the UN, 'Speech - Evidence of Russia's involvement in Salisbury attack', September 2018 (<https://www.gov.uk/government/speeches/you-dont-recruit-an-arsonist-to-put-out-a-fire-you-especially-dont-do-that-when-the-fire-is-one-they-caused>).

(18) The Local, 'How Turkey is using Germany to whip up nationalism at home', 8 March 2017 (<https://www.thelocal.de/20170308/how-turkey-is-using-germany-to-stir-up-nationalism-at-home/>); The Conversation, 'How Russians have helped fuel the rise of Germany's far right', November 2018 (<https://theconversation.com/how-russians-have-helped-fuel-the-rise-of-germanys-far-right-105551>).

(19) EUBusiness, 'EU probes corruption claims at Turkish agency' (<https://www.eubusiness.com/news-eu/turkey-corruption.1074>); Nardelli, A., 'Revealed: The explosive secret recording that shows how Russia tried to funnel millions to the "European Trump"', BuzzFeedNews, 10 July 2019 (<https://www.buzzfeednews.com/article/albertonardelli/salvini-russia-oil-deal-secret-recording>).

an unfavourable bargaining position, if it is at the negotiating table at all. Finally, Russia often serves as a role model for Turkey in how to deal with the EU.

CONCLUSIONS

This comparative audit has revealed that Russia and Turkey do indeed share many commonalities, but also differences. On balance, shared characteristics and interests have steered the relationship towards cooperation, interspersed by frequent conflictual episodes. In situations where tensions have escalated both sides have so far been successful in averting the worst, but this is not inevitable in the future. Regime change or military miscalculation may upset the balance.

This overview provides a few insights for Europe. First, economic clout, soft power and polite diplomatic exchanges alone will not be enough to put its relations with Russia and Turkey on a more favourable footing. Second, Turkey's worldview is closer to that of Russia, but its economy and security is intimately linked with the West. Unlike Russia, Turkey is in many significant ways tied to Western institutions such as NATO and the EU and to democratic processes and traditions. Arguably, Europe has more leverage over Turkey than over Russia and stands a better chance of developing a more productive relationship with Ankara. Third, if political change comes about it is more likely to occur first in Turkey rather than in Russia. Such changes can undermine the 'authoritarian trust' that binds the two regimes and bring about new dynamics in bilateral relations. This may provide Europe with a new political opening in the coming decade.

CHAPTER 2

RUSSIA AND TURKEY IN THE ECONOMIC REALM

More than just money

by
STANISLAV SECRIERU

Russian-Turkish economic relations have come a long way since the 1990s. However, fruitful business relations between the two were not preordained. Why therefore, instead of evolving in alternative directions, like 'deep freeze' or competition, have economic relations taken off and endured since then? There are a myriad of factors which may account for the vitality and resilience of bilateral economic exchanges. But as with any such relations it is imprudent to assume that the future will be a mere extension of the recent past. Thus, after three decades of non-linear progression, what are the prospects for the Russian-Turkish economic partnership? Cooperation in the economic realm between these two regional powers inevitably entails consequences for their immediate neighbours, including the EU. Therefore, what are the implications of the Russian-Turkish economic partnership for the EU today and tomorrow? To answer these questions it is useful to think about Russian-Turkish economic relations as an interplay of three parallel processes: *thickening, empowering and leveraging*.

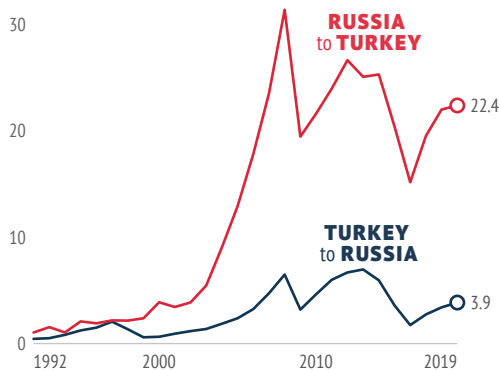
THICKENING

The expansion of bilateral economic relations was not a straight path. In the 1990s, economic ties grew intermittently; periods of trade growth were disrupted by economic turbulence in both countries. Still the importance of this period for economic partnership cannot be disregarded. It was during this period that Turkish construction companies and banks rapidly expanded into the Russian market and both sides concluded important economic agreements (e.g., the deal to build the Blue Stream gas pipeline and sale of armoured vehicles to Turkey) paving the way for acceleration of economic cooperation in the energy field and arms trade in the coming decades. In the 2000s relations continued to thicken, at a faster pace, and economic exchanges skyrocketed, showing the best results in decades. This was followed by sharper variations in trade relations throughout the 2010s. Despite uneven dynamics, the tendency towards thickening has persisted although this has been disrupted at intervals by economic and political crises – as well as by the Covid-19 epidemic of 2020–2021.

Several forces nurtured the expansion of economic ties during the years of growing *entente*

Trade in goods

1992–2019, \$ billion



Data: World Bank, 2021

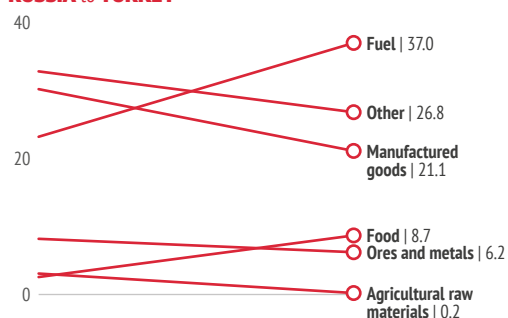
between Presidents Putin and Erdoğan. Firstly, the two countries' perceptions of each other as security actors changed; both became more desirable partners for each other on the international stage. Secondly, infrastructure projects initiated in the 1990s came to fruition, reinforcing the trend of deepening economic cooperation; in 2003 Blue Stream became operational. The successful conclusion of big projects encouraged Ankara and Moscow to invest more and negotiate new lucrative deals. Thirdly, both economies performed much better than in the 1990s; this in turn, stimulated demand for goods and services. Last but not least, what Russia had to offer was exactly what Turkey's economy needed and vice versa. And while Russia is by far the side which benefits the most from bilateral trade in goods, Turkey is able to partially compensate by a larger volume of exports of services to Russia. This relative balance has led both sides to see their collaboration in the economic realm as a win-win formula.

Looking at quantitative parameters, figures reveal a larger bandwidth of bilateral economic exchanges than at any time in recent history. From 1992 to 2019 the overall value of Russian-Turkish trade turnover increased by 1 769 % ⁽¹⁾. Bilateral accumulated investments

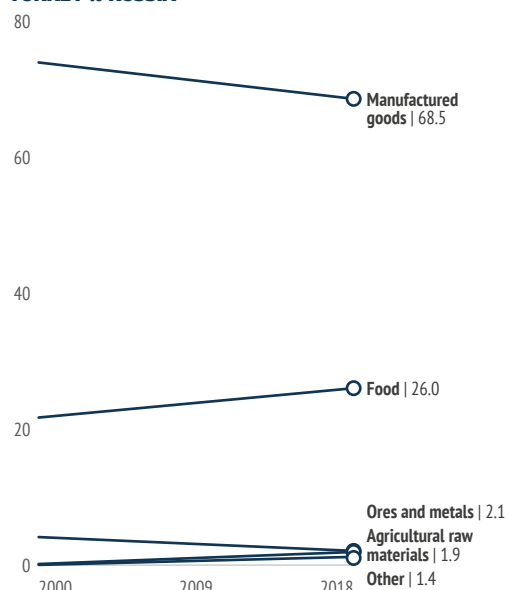
Structure of trade in goods

2000–2018, \$ billion

RUSSIA to TURKEY



TURKEY to RUSSIA



Data: World Bank, 2021

reached \$20 billion in the same period ⁽²⁾. On top of Blue Stream, Russia and Turkey have agreed and built two legs of the TurkStream gas pipeline under the Black Sea; gas transported through the first line is reserved for the Turkish market. Another area where Russia and Turkey enjoy prosperous trade relations is tourism. In 2003 for the first time the number of Russian tourists in Turkey exceeded one million;

(1) WITS, 'Trade statistics by country/region' (<https://wits.worldbank.org/countrystats.aspx?lang=en>).

(2) Tosun, H.O., 'Turkish official: Trade with Russia should reach \$100B', Anadolu Agency, 7 July 2019 (<https://www.aa.com.tr/en/economy/turkish-official-trade-with-russia-should-reach-100b/1542364>).

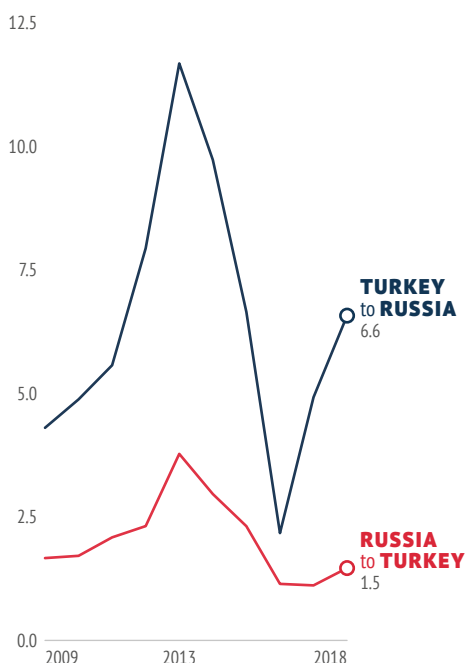
15 years later this figure skyrocketed to seven million ⁽³⁾.

Quantitative indicators show much denser bilateral economic exchanges in the post-Cold War period. As a consequence, ‘thickening’ has made Russia and Turkey more important economic partners. Whereas 20 years ago Turkey was not in the top 10, it is now Russia’s fifth trading partner ⁽⁴⁾. The commercial importance of this relationship is even greater for Turkey, with Russia becoming its second-most important commercial partner within the span of two decades ⁽⁵⁾. The economic partnership rapidly became an issue of high politics; for both leaders deeper commercial relations have testified to the emergence of an economic multipolar order.

To what extent has this thickening challenged the EU’s interests? Taking a bird’s-eye view, this intensification of economic relations between Moscow and Ankara has not come at the EU’s expense. In two decades, albeit with some fluctuations, EU trade with Russia and Turkey has substantially increased too. As a result, the EU is now by far the most important trading partner for Russia and Turkey as well as the main investor in their economies ⁽⁶⁾. Thus, although there has been a considerable expansion in economic ties between the two countries, this has not even come close to the point of challenging the EU’s economic primacy for both sides.

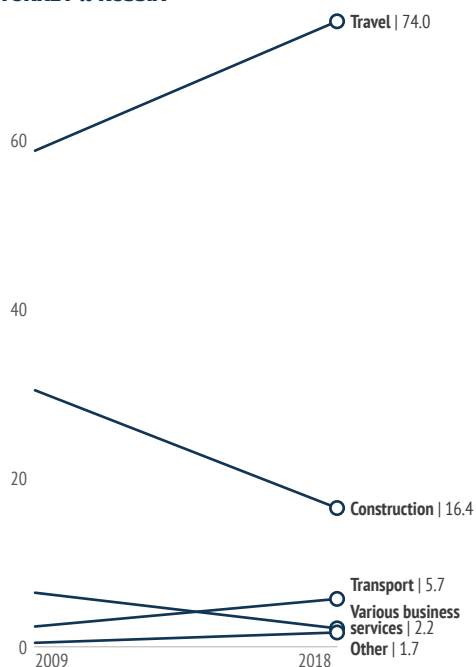
Trade in services

2009–2018, \$ billion



Structure of service exports, 2009 vs 2018, % of total trade

TURKEY to RUSSIA



Data: World Bank, 2021

(3) ‘Turkey wants more Russian tourists than the seven million who came in 2019’, Duvar, 27 February 2020 (<https://www.duvarenglish.com/culture/2020/02/27/turkey-wants-more-russian-tourists-than-the-seven-million-who-came-in-2019/>).

(4) European Commission, ‘European Union, Trade in goods with Russia’, Brussels, 5 May 2020 (https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_russia_en.pdf).

(5) European Commission, ‘European Union, Trade in goods with Turkey’, Brussels, 8 May 2020 (https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_turkey_en.pdf).

(6) European Commission, ‘Russia’, 20 May 2020 (<https://ec.europa.eu/trade/policy/countries-and-regions/countries/russia/>); European Commission, ‘Study of the EU–Turkey Bilateral Preferential Trade Framework’, 26 October 2016 (http://trade.ec.europa.eu/doclib/docs/2017/january/tradoc_155240.pdf).

There is another aspect to be considered. The Russian-Turkish economic partnership has not laid the foundations for establishing a rival regional economic bloc of states on Europe's border. There are two explanations for this. On the one hand, due to the EU-Turkey Customs Union the Turkish economy is strongly anchored in the EU's orbit. Its manufacturing sector is closely integrated with the European market. While floating the idea of affiliation with the Russian-led economic bloc – the Eurasian Economic Union (EAEU) – Ankara actually sought to force the EU's hand to upgrade the Customs Union. On the other hand, Russia favours asymmetrical economic integration, which allows it to have an upper hand politically; and in turn it resists economic integration which may challenge its freedom of action or its primacy. From this perspective, Turkish membership in a Russian-led economic organisation would be an unwelcome development, as it would alter the distribution of power within this structure.

The fact that this economic relationship has not had a significant impact for the EU on the macro-level does not mean however that there are no implications for the Union. To understand what are the potential or actual consequences for Europe, one needs to zoom in on how Russian-Turkish economic collaboration, even if inferior in terms of size of trade and investments to both countries' respective economic partnerships with the EU, has strengthened both sides.

EMPOWERING

Thickening is a story of increasing numbers; empowerment shows how these economic ties have enhanced both partners' power and

influence. Usually economic exchanges bring financial benefits and translate into more resources for states. What distinguishes the Russian-Turkish economic partnership however is multidomain empowerment, which transcends the economic field and spreads into the political, military and diplomatic realms.

Turkey's power gains

Russia has provided extensive energy resources necessary to sustain Turkey's economic growth. For the last two decades, Russia has been the number one source of mineral fuels (gas, oil and coal combined) for Turkey; Russia's share in Turkish mineral imports jumped from 15% in 2001 to 48% in 2009 and then declined to a still significant 38% in 2018⁽⁷⁾. Thus, imports of energy resources from Russia have been an important component ensuring Turkey's energy security in the midst of economic expansion. Russia is set to continue to play a prominent role in the energy sector as the Russian state corporation Rosatom has been awarded a contract to build Turkey's first nuclear power station in Akkuyu.

Partnership with Russia has filled Turkish state coffers, thus providing the government in Ankara with more economic resources. Trade in agro products has been a chief source of profits: wheat imported from Russia fuelled Turkey's production and export of wheat-based products, a business which over the last two decades has generated almost \$30 billion in profits⁽⁸⁾. In terms of exports, between 2008 and 2018 Russia was the main market for Turkish fruits⁽⁹⁾. The same was true for Turkish vegetables, until the fallout from the political crisis around the downing of the Russian fighter jet over the Syrian-Turkish border in 2015. Although, the

(7) 'Where did Turkey import mineral fuels, oils and waxes from in 2018?', *Atlas of Economic Complexity*, (<https://atlas.cid.harvard.edu/explore?country=224&product=126&year=2018&tradeDirection=import&productClass=HS&target=Product&partner=undefined&startYear=undefined>).

(8) Farmonline, 'Turkey emerges as a major wheat importer', 22 April 2020 (<https://www.farmonline.com.au/story/6732133/turkey-emerges-as-a-major-wheat-importer/>).

(9) 'Where did Turkey export fruits and nuts to in 2008-2018?', *Atlas of Economic Complexity*, (<https://atlas.cid.harvard.edu/explore?country=224&product=107&year=2008&productClass=HS&target=Product&partner=undefined&startYear=undefined>).

lucrative agro business was not the main reason that prevented Turkey from joining the EU's sanctions on Russia in 2014, it certainly served as a restraining factor. Russia's partial food ban on EU exports, enforced the same year, was perceived by Ankara as an opportunity to capture a bigger share of the Russian market.

The two other significant sources of revenue have been export of construction and tourism services to Russia. Data for all contracts executed by Turkish construction companies abroad for nearly the last five decades put Russia at first place with a 20% share ⁽¹⁰⁾. In total, they carried out almost 2 000 projects and earned \$73.1 billion on the Russian market ⁽¹¹⁾. Cooperation in the travel and tourism sector has been similarly advantageous for Turkey. In 2019 Turkey registered record numbers of tourists and the highest ever revenues generated by this sector. Russia came first in terms of number of tourists with a 15.6% share and fourth in terms of spenders (accounting for 8% of all expenditure by tourists).

The partnership with Russia has sustained Turkish ambitions of gaining and using energy levers for commercial and political purposes. For Turkey, the concentration of Russian gas pipelines on its territory and the interconnection with neighbouring European states is supposed to advance Ankara's vision of playing the role of strategic transit corridor and possibly a continental hub ⁽¹²⁾. But Turkey is not interested in hosting Russian pipelines only. Ankara has invested resources in building portions of the Southern Gas Corridor, which connects Azerbaijan via Georgia, Turkey, Greece and Albania with Italy. Ankara has also been involved in discussions to build a gas pipeline from Iraqi Kurdistan. Thus, its geostrategic position as the

host of multiple gas transit routes is expected to increase Turkey's leverage over exporters as well as importers of gas and thus create political openings for Ankara.

As a transit country, Turkey has an advantage over Russia which it is keen to exploit. The Turkish government linked negotiations on Turk-Stream with the issue of the price of Russian gas. As the long-term contracts with Gazprom are due to expire in 2021 and 2025, Turkey is likely to use its transit status in combination with an increasingly diversified portfolio of gas imports as a bargaining chip to extract better terms. At the same time, Ankara strives to become 'an indispensable actor for Europe's energy security' ⁽¹³⁾ by providing physical connection to a variety of gas producers in the south and east. It uses transit services among other tools to earn new friends or solidify old partnerships, and is thus able to play divide-and-rule games in its relations with Europe.

Turkey also extracts benefits from the arms business with Russia. Over the last three decades, Turkey has acquired Russian weapons. From Turkey's vantage point, Russia helps to close capability gaps (systems which cannot be produced domestically), sustain arms exports (e.g., exports of Turkish armoured vehicles with integrated Russian Kornet anti-tank guided missiles) and strengthen its hand in relations with allies. In the 1990s Russia supplied armour and helicopters in the midst of the Turkish government's fight against the Kurdistan Workers' Party (PKK), when Germany suspended arms supplies to Ankara. Turkey also opted for the Russian S-400 missile defence systems after the US refused to supply Patriots (equipped with secret tactical software) and pressured Turkey to cancel the

(10) TMB, 'Turkish Contracting in the International Market', April 2016 (https://www.tmb.org.tr/doc/file/YDMH_April_2016.pdf).

(11) 'Turkish, Russian leaders to launch cross-cultural year in Moscow', *Daily Sabah*, 8 April 2019 (<https://www.dailysabah.com/diplomacy/2019/04/08/turkish-russian-leaders-to-launch-cross-cultural-year-in-moscow>).

(12) Karagol, E.T. and Kizilkaya, M., 'The Turkish Stream Project in the EU-Russia-Turkey Triangle', *Insights Turkey*, Vol.17, No 2, 2015, p.61.

(13) Demiryol, T., 'The Geopolitics of Energy Cooperation between Turkey and the European Union', *L'Europe en Formation*, no. 367, 2013, pp.109-134 (<https://www.cairn.info/revue-l-europe-en-formation-2013-1-page-109.htm>).

tender for acquisition of air defence systems from China ⁽¹⁴⁾. Ankara's message is that if it does not get what it needs, there is always an alternative supplier on the horizon.

The major goal of cooperation with Russia is not to turn it into a systemic military supplier, but to pressure allies to sell arms that Turkey covets and at better terms. Ankara spoke about more military-technical cooperation with Russia, as the EU agreed to limit military supplies to Turkey amid its operation against the Kurds in Syria ⁽¹⁵⁾. As Turkey bought the S-400 missile defence system from Russia, in parallel it kept negotiating with the US about a contract for the Patriot air defence system ⁽¹⁶⁾. And if talks with the United States have been inconclusive so far, floating Russia as an alternative supplier and the perspective of unrealised profits have paid off for Turkey in Europe's case ⁽¹⁷⁾.

The economic partnership with Russia has also played well for Erdoğan at home. Expanding economic relations with Russia and grand bilateral projects have been portrayed domestically as examples of Erdoğan's successful foreign policy. And the Turkish president is keen to publicly exploit the conclusion of flagship projects with Russia to boost his domestic legitimacy, as demonstrated by the inauguration of the TurkStream gas pipeline with much fanfare in January 2020. No doubt the unveiling of Turkey's first reactor at the Akkuyu nuclear power plant, slated to be ready in 2023 when Turkey will mark the 100th anniversary of the

foundation of the Republic, will be the occasion for a similar PR exercise.

The partnership with Russia has solidified Erdoğan's grip on power because it has had a trickle-down effect, spreading benefits to various societal stakeholders. Construction businesses in Russia are not only good for Turkey in general, but also for members of Erdoğan's entourage. Business with Russia helps to enrich and nurture the clientelistic networks backing the Turkish president. For instance, Rönesans Holding, who built Erdoğan's luxurious presidential palace, secured a contract

to erect the Lakhta Center, the new headquarters of Gazprom in Saint Petersburg. However, the benefits extend below and beyond that level. Turkish construction companies in Russia often employ Turkish nationals too. The same Rönesans Holding employs 25 000 people in Russia, among which 30 % are Turks ⁽¹⁸⁾. Thus, the Turkish construction business in Russia has provided jobs for a growing population back at home and played its part in ensuring social stability. The same goes for the influx of Russian tourists to Turkey, as the sector employs more than two million people.

Russia's power gains

The economic partnership with Turkey has not been less rewarding for Russia. It has boosted its economic and political strength across various domains, fostered Turkish dependencies

(14) Lindenstrauss, G. and Magen, Z., 'The S-400 Deal: Russia Drives another Wedge between Turkey and its NATO Allies', *INSS*, no. 982, 18 October 2017 (<https://www.inss.org.il/publication/s-400-deal-russia-drives-another-wedge-turkey-nato-allies/>).

(15) Emmott, R., 'EU governments limit arms sales to Turkey but avoid embargo', *Reuters*, 14 October 2019 (<https://www.reuters.com/article/us-syria-security-eu-france-idUSKBN1WTO4>).

(16) Qinh, W., 'Turkey's president says still wants to buy U.S. Patriot missiles: local media', *Xinhua*, 14 September 2019 (http://www.xinhuanet.com/english/2019-09/14/c_138391727.htm).

(17) Ahval, 'Germany lifts suspension of arms deliveries to Turkey - Jerusalem Post', 4 December 2019 (<https://ahvalnews.com/germany-turkey/germany-lifts-suspension-arms-deliveries-turkey-jerusalem-post>).

(18) Al-Monitor, 'Turkish company is No. 1 foreign contractor in Russia', 29 May 2014 (<https://www.al-monitor.com/pulse/tr/business/2014/05/turkey-firm-russia-contracting-market.html>).

that Moscow can exploit and provided the Kremlin with leverage over third parties.

Economic engagement with Turkey has allowed Moscow to substantially increase its earnings from exports, bolstering the state's coffers. From 2008 onwards Turkey ranked among the top two major importers of Russian wheat ⁽¹⁹⁾, contributing to the overall growth of Russia's mounting revenues from agro exports and sustaining the Kremlin's narrative of Russia as an emerging food superpower ⁽²⁰⁾. In 2020, Turkey was the third biggest market after China and the EU for Russian agro exports ⁽²¹⁾.

Trade in minerals has been far more profitable. Turkey has been an important source of revenue for Russia's state coffers; its imports of Russian gas grew from 19 billion cubic metres (bcm) in 2006 to almost 29 bcm in 2017. Turkey surpassed Italy in 2014 and became the second-largest importer of Russian gas in Europe. That year the export of mineral fuels to Turkey alone generated around \$14 billion in revenues, only one billion less than Russian annual sales of weapons ⁽²²⁾. As oil prices and volumes of Russian gas imported by Turkey have declined recently, the dividends of this business for the Kremlin have begun to shrink. Still, looking from the perspective of the last two decades, Turkey has been an important client who indirectly contributed to Russian budget revenues, 41% of which in 2019 derived from export of minerals ⁽²³⁾.

In Moscow's hands, the Russian-Turkish gas trade has provided a means of putting pressure on Ankara.

In Moscow's hands, the Russian-Turkish gas trade has provided a means of putting pressure on Ankara. In 2019 approximately one-third of gas consumed in Turkey was used to generate electricity ⁽²⁴⁾. While oil and coal can easily be accessed from alternative external sources, the gas market is still dominated by pipeline deliveries and long-term contracts (although this has started to change over the last few years). An unintended consequence of building new

gas pipelines with Russia and importing more gas from Gazprom has been Turkey's growing dependence on Russia as a major source of deliveries. Russia has taken advantage of this state of affairs to dictate the price and use gas deliveries for political purposes too, occasionally constraining Turkey's freedom of action in foreign policy. Unsurprisingly, after experiencing the political effects of overdependence, Ankara sought to dilute Russian gas leverage by investing in liquefied natural gas (LNG) infrastructure and expanding the capacity of alternative gas pipelines.

As Turkey has sought to reduce its reliance on Russia in this domain, the Kremlin has been adroit in creating new energy dependencies by offering to build Turkey's first nuclear power station. Rosatom's activities in Turkey help to showcase Russian technological capabilities, to increase its share of the nuclear export market and ultimately generate revenue from future sales of electricity to Turkish consumers. More importantly, the Russian nuclear monopoly is keen to show that it can succeed where

(19) 'Where did Russia export Wheat and meslin to in 2008?', *Atlas of Economic Complexity* (<https://atlas.cid.harvard.edu/explore?country=186&product=736&year=2008&productClass=HS&target=Product&partner=undefined&startYear=undefined>).

(20) ResearchGate, 'Value of Russian Food Exports, 2001-2018' (https://www.researchgate.net/figure/Value-of-Russian-Food-Exports-2001-2018-Sources-Rosstat-data-various-years-Ministry_fig1_337271858).

(21) Wegren, S.K., 'Russian Agriculture and Food Trade', *Russian Analytical Digest*, No 268, 6 May 2021, p.10.

(22) 'What did Russia export to Turkey in 2014?', *Atlas of Economic Complexity* (<https://atlas.cid.harvard.edu/explore?country=186&product=undefined&year=2014&productClass=HS&target=Partner&partner=224&startYear=undefined>); 'Russia's arms export revenues in 2014 remained record-high at above \$15 bln — PM', TASS, 21 April 2015 (<https://tass.com/russia/790721>).

(23) Prime Business News Agency, 'Ministry of Finance Calculated share of Russian budget revenues from oil and gas in 2020-2022', 19 September 2019 (https://prime.ru/state_regulation/20190919/830338839.html).

(24) Enerdata, 'Turkey Energy Information' (<https://www.enerdata.net/estore/energy-market/turkey/>).

competitors – including European ones – have failed (e.g. the Sinop nuclear plant project which was abandoned in 2018).

Cooperation in the energy field with Turkey enhances Russia's strength in other important ways. TurkStream's second leg, designed for European customers, will in future help Russia to divert gas supplies from transit-ing through Ukraine and thus to cut revenues from transit services accruing to Ukraine. Moreover, TurkStream, in combination with alternative pipelines under construction by Russia, will almost entirely eliminate Gazprom's dependency on Ukraine for gas transit to Europe ⁽²⁵⁾. This fits in well with Russia's overall strategy of weakening Ukraine economically and excluding it from the EU-Russia gas trade. TurkStream will also serve as Gazprom's new export window to the Balkans ⁽²⁶⁾. Russia seeks not only to defend its market share, but also to stonewall reforms (TurkStream is in breach of the EU's Third Energy Package legislation) and maintain its political influence in the region. Thus, Russian-Turkish cooperation on gas transit has direct negative implications for the EU's policies in the Western Balkans and eastern neighbourhood, where Europe works to support reforms and foster resilience.

Russia's military-technical engagement with Turkey is driven by a mixture of mercantilist and geopolitical motives. The export of weapons is a major source of revenue and this has become more important for the Russian defence industry due to the decline in state orders. Turkey is not among Russia's biggest customers, but every new contract in the portfolio in such a competitive market is always welcome. The contracts for the delivery of two regiments of S-400 systems, a deal worth around \$5 billion, is one such example.

For Turkey, the partnership has come at the cost of greater dependence on Russia's energy resources.

Even more important are the geopolitical dividends of this cooperation. Quite often, Russia has pitched its weapons when NATO allies have refused to sell similar systems to Turkey or at times of heightened tensions between Ankara and Washington. Russia successfully concluded a deal for the sale of S-400 missiles to Ankara in the aftermath of the failed *coup d'état* in Turkey in 2016, which saw US-Turkish relations further deteriorate. Moscow offered SU-35 and SU-57 jets when the United States removed Turkey from the F-35 fighter jet programme. Thus, Russia regards arms trade with Turkey as a continuation of competition by other means with the United States and its European allies. Arms sales aim to deepen splits between Turkey and its allies and weaken the internal cohesion of NATO. Moreover, weapons trading establishes a long-term relationship between producer and client. Thus for the Kremlin, this cooperation if deepened opens up opportunities to create new Turkish dependencies, endowing Russia with greater leverage ⁽²⁷⁾.

Absolute gains are rare in international affairs; empowering naturally comes with downsides. The partnership with Turkey has further disincited Russia from conducting reforms to diversify its economy and exports. For Turkey, the partnership has come at the cost of greater dependence on Russia's energy resources, which the Kremlin has not hesitated to exploit. Before reflecting critically on the future prospects of Russian-Turkish economic relations, this analysis will examine instances of economic warfare between the two countries and show how these have impacted trade exchanges and investments in the short run.

(25) 'TurkStream natural gas pipeline to impact region's gas flow', *Daily Sabah*, 23 October 2019 (<https://www.dailysabah.com/energy/2019/10/22/turkstream-natural-gas-pipeline-to-impact-regions-gas-flow>).

(26) Yermekbayev, A. et al., 'Russia and Turkey: energy partnership', *Central Asia and the Caucasus*, Vol. 20, No 3, 2019, p.40.

(27) 'A military expert identified important lever against Turkey', *MK*, 23 April 2021 (<https://www.mk.ru/politics/2021/04/23/voennyi-analitik-nazval-vazhnyy-rychag-vliyaniya-na-turciyu.html>).

LEVERAGING

Focusing on the ‘thickening’ and ‘empowering’ dimensions may paint an over-ideal picture of Russian-Turkish economic relations however. These, in actual fact, have been far from rosy. On several occasions in the past Moscow or Ankara tried to hinder each other’s trade flows or economic projects. In 1994 Turkey changed the rules for tankers and vessels transiting through the Bosphorus Strait, to the dismay of Moscow, as Russia then heavily relied on the Black Sea port of Novorossisk as its largest oil export terminal. In the late 1990s–early 2000s Russia opposed the construction of pipelines from Azerbaijan to Turkey rivalling with Russian-controlled energy transportation routes. These contentious issues were mainly of a commercial nature, but very soon economic statecraft was put to use to accomplish geopolitical goals too. Because Moscow perceived that economically it had the upper hand over Turkey, it was the one who abused their interdependence the most.

Russia launched the first salvo in 2008. From mid-summer Turkish freight trucks began experiencing long delays at Russian customs posts. The situation worsened in the wake of the Russian-Georgian war in August. Ankara complained that Russian customs officers were delaying trucks carrying Turkish exports by conducting over-zealous inspections. Officials estimated the potential costs of delays at \$3 billion ⁽²⁸⁾. The authorities in Ankara perceived that Moscow was exerting pressure on them to suspend the access of US ships to the Black Sea via the Turkish straits ⁽²⁹⁾. While Turkey correctly interpreted the Russian message and prevented two US medical ships heading to Georgia from passing through the straits, it nevertheless decided to hit back at Russia by introducing more extensive customs checks for Russian imports. The spat did not last long;

after Erdoğan’s visit to Moscow and in order to accommodate Russian interests, intensified customs inspections ceased. But the brief economic conflict was a harbinger of things to come when Russia and Turkey locked horns again over geopolitical issues.

The moment of crisis came in November 2015 when the Turkish airforce downed a Russian Su-24 fighter jet over the Syrian-Turkish border. This launched the second episode of Russia-Turkish economic warfare, which proved to be more disruptive, protracted and costly than in 2008. Moscow responded to the incident by imposing wide-ranging economic sanctions against Turkey. In addition to official restrictive measures, the Kremlin instructed law-enforcement officials to use intimidation tactics and make it more difficult for Turkish businesses to operate in Russia.

Predictably, Russia targeted the more sensitive items in Turkey’s exports and imports sectors. For instance, it suspended imports of some fruits and vegetables, introduced administrative barriers for industrial imports, trimmed gas deliveries and cancelled gas price reductions, banned construction projects with Turkish firms and sales of charter holidays to Turkey. The Federal Security Service (FSB) raided the offices of four Russian banks with Turkish capital. Finally, sending a direct signal to President Erdoğan, the FSB conducted searches and seized computers and documents from the Saint Petersburg office of Rönesans Holding. Turkey had fewer tools than Russia at its disposal to conduct a tit-for-tat response. Nevertheless, just as in 2008 it tried to play tough. Among other moves, it detained Russian ships and suspended ferry traffic with Crimea, while Turkish tax authorities filed tax claims against Russia’s Sberbank’s daughter bank in Turkey.

This time economic warfare led to a drastic albeit temporary reduction in economic

(28) ‘Turkish trucks stuck at Russian border face risk of losing market’, *Hurriyet*, 28 August 2008 (<https://www.hurriyet.com.tr/gundem/turkish-trucks-stuck-at-russian-border-face-risk-of-losing-market-9765783>).

(29) ‘The Foreign Ministers of Russia and Turkey will discuss the creation of a “stability platform” in the Caucasus’, *Polit*, 2 September 2008 (<https://m.polit.ru/news/2008/09/02/turquie/>).

exchanges. In 2016 fewer than a million Russian tourists visited Turkey⁽³⁰⁾. The Turkish share in Russia's vegetable imports collapsed from 21 % in 2015 to 2 % one year later⁽³¹⁾. European Bank for Reconstruction and Development (EBRD) experts estimated that in a one-year timeframe Russian sanctions could reduce Turkey's GDP growth by between 0.3 and 0.7%⁽³²⁾. But sanctions were neither problem-free nor painless for Russia either. To avoid delays, Moscow had to exclude from sanctions Turkish companies building infrastructure for the 2018 Football World Cup. At the same time, bans on fruits and vegetables contributed to food price inflation in Russia⁽³³⁾.

Although Turkey sued for peace and in May 2017 the governments signed a joint declaration lifting the majority of trade restrictions, the two sides failed to fully restore economic relations. Economic skirmishes continued to take place between Moscow and Ankara. For example, Russia did not immediately lift the ban on the import of Turkish tomatoes, while Ankara in response removed Russian wheat from the list of tax-free imports. This demonstrates how, apart from constraining economic growth in the short term, sanctions can have more profound and far-reaching effects on bilateral relations long after they have been removed or softened.

Some signs point to decoupling between different sectors of the two economies. In the space of two years (2017/18) two Russian banks, Sberbank and Gazprombank, sold their stakes and exited the Turkish market. Political tensions may not have been the main factor, but still probably counted when the decisions to

withdraw were made. However, the most important parting of the ways is taking place in the bilateral gas trade. Although Ankara's efforts to diversify gas imports preceded the crisis over the downing of the Russian jet, they have been gathering momentum since. Turkey has stepped up investments in LNG import facilities (e.g., the Botaş Dörtyol LNG Storage Facility) and increased imports of pipeline gas from Azerbaijan (in 2020 Baku exported 21 % more gas to Turkey than in the previous year)⁽³⁴⁾. All this has led experts in Moscow to make gloomy predictions about the decline of Russian gas exports to Turkey in the future⁽³⁵⁾.

Economic statecraft has been one of the factors which impeded the thickening of Russian-Turkish economic relations in the 2010s. Looking forward, it has the potential to have long-term repercussions for relations in the coming decade.

What can the EU learn from these episodes of economic warfare between Russia and Turkey? There are three potential takeaways. Firstly, despite numerous declarations by the Russian leadership that sanctions do not work (in the context of the restrictive measures imposed by the EU on Russia since 2014), the actions of the Russian government against Turkey are testimony to the contrary. Moscow's constant reiteration of the futility of sanctions aims to sap the political will in the EU to maintain them. Secondly, while sanctions do work, their effect is proportional to the intensity of the sanctions and parallel efforts of the sender state to push back against the targeted state in the conflict theatre. Thirdly, Russia perceives interdependence not as a tool to mitigate political or

(30) 'Russian Tourism to Turkey Falls 90%', *The Moscow Times*, 28 June 2016 (<https://www.themoscowtimes.com/2016/06/28/russian-tourism-to-turkey-falls-90-a53475>).

(31) 'Where did Russia import Vegetables from in 2016?', *Atlas of Economic Complexity* (<https://atlas.cid.harvard.edu/explore?country=186&product=106&year=2016&tradeDirection=import&productClass=HS&target=Product&partner=undefined&startYear=undefined>).

(32) Bilgic-Alpaslan I. et al., 'Economic implications of Russia's sanctions against Turkey', European Bank for Reconstruction and Development, 7 December 2015 (<https://www.ebrd.com/news/2015/economic-implications-of-russias-sanctions-against-turkey.html>).

(33) Ibid.

(34) 'Azərbaycanın sohranajet vtoroje mesto po postavkam gaza v turtsiju!', [Azerbaijan retains second place in gas supplies to Turkey], *Turan*, 1 February 2021 (https://turan.az/ext/news/2021/2/subsc/energy_news/ru/899.htm/001).

(35) 'Tureckij istek: Kak i pochemu «Gazprom» terjaet odin iz krupnejshih rynkov' [Turkey is gone: how and why Gazprom is losing one of its largest markets], *Kommersant*, 4 September 2020 (<https://www.kommersant.ru/doc/4476830>).

military conflicts, but as a means allowing it to prevail in such conflicts and thus dictate its terms. Excessive dependence on Russia, in sectors of strategic importance for the economy, creates political openings for Moscow in times of crises.

WHERE TO?

In 2013 Erdoğan boasted that Turkey had established a goal of reaching \$100 billion trade turnover with Russia by 2020⁽³⁶⁾. This objective has not been met and has little chance of being fulfilled in the coming decade.

Thickening of economic relations is bound to decrease rather than regain its former momentum. The era of mega construction projects (e.g., the Sochi Olympic Games and the 2018 Football World Cup) in which Russia invested billions of dollars is over. Covid-19 may prove to be a temporary disruption but it has had devastating consequences for the tourism sector.

Russian tourists will probably return, but Gazprom is set to lose its market share in Turkey, due to the diversification of Turkish gas imports and stagnation of local demand. It looks like the current Russian-Turkish business model may have reached its limits. The situation can be redressed, if both sides pursue political and economic reforms. Under the current leadership in Russia and Turkey, however, the chances of these being carried out are slim. But reforms alone cannot guarantee the revival of the economic partnership; perceptions matter too. In the coming decade Moscow and Ankara may regard each other as more threatening *vis-à-vis* their respective security interests, and this in turn may lead both sides to carefully

weigh up the pros and cons before engaging in new bilateral economic projects.

There are more reasons to believe that the economic relationship will be less mutually empowering. Russia will earn less revenue from gas exports to Turkey while Rosatom still has to prove that the Akkuyu project is economically viable. Energy diplomacy may bring fewer dividends than expected. As the share of LNG in the global gas trade grows, some gas pipelines may very well end up being underused; and oversupply of gas in Europe will strengthen the hand of consumers over producers. Turkey's further cooperation with Russia in the defence field may backfire, disrupting traditional linkages with Western manufacturers and inflicting financial damage.

If Turkey tries to preserve and improve technical-military relations with the West, this might mean not more but less cooperation with Russia in this sector. The alternative is more strategic dependence on Russia in this field (e.g. to procure engines to power the fighter jets that Turkey plans to manufacture in the near future).

So far Russia and Turkey have managed to avoid a head-on military confrontation; but this cannot be taken for granted in future.

More leveraging of economic interdependence cannot be ruled out in the coming decade as Russia and Turkey are increasingly present in each other's neighbourhoods. So far they have managed to avoid a head-on military confrontation; but this cannot be taken for granted in the future. Eventual re-escalation of the conflict in Nagorno-Karabakh may see Russia using not just military power but also resorting to economic statecraft to hit back at Azerbaijan and Turkey. Another clash via proxies in Syria or Libya may trigger a new round of bilateral economic warfare. Thus, intensifying competition between Russia and Turkey for regional influence has the potential to undermine the economic component of bilateral relations.

(36) 'Turkey and Russia set trade volume target of \$100 billion in 2020', *Daily Sabah*, 23 November 2013 (<https://www.dailysabah.com/business/2013/11/23/turkey-and-russia-set-trade-volume-target-of-100-billion-in-2020>).

Given this picture, what are the implications for the EU? Firstly, it is clear that for both Moscow and Ankara economic exchanges with the EU will remain far more important than their own bilateral economic relations. Secondly, there is no prospect of the Russian-Turkish economic partnership turning into a regional economic bloc able to compete with the EU. On the contrary, Turkey may double down efforts to secure the upgrade of the Customs Union, which endows the EU with strong leverage. Thirdly, it is in the interest of the EU to undermine those aspects of Russian-Turkish energy cooperation which seek to weaken the position of the EU and its neighbours. Fourth, if Europe and the United States are to avoid being played off against each other there is need for greater intra-EU and transatlantic coordination on military-technical cooperation with Turkey. Last but not least, the regional competition between Moscow and Ankara may yield opportunities to draw Turkey closer to Europe both economically and politically.

CHAPTER 3

RUSSIA AND TURKEY IN THE POST-SOVIET NEIGHBOURHOOD

Uneasy tango

by
SINIKUKKA SAARI

The vast post-Soviet region separates Russia and Turkey geographically. Both actors seek to play an active role in the region. This chapter analyses how Russia and Turkey interact in their shared neighbourhood and what the implications of this are for the EU. In order to address these questions, the chapter focuses on three distinct parts of the post-Soviet region where Russian and Turkish collaboration and competition is most intense – the South Caucasus, the Black Sea and Central Asia. It concludes with some thoughts on the future of Russia-Turkish relations in the post-Soviet neighbourhood.

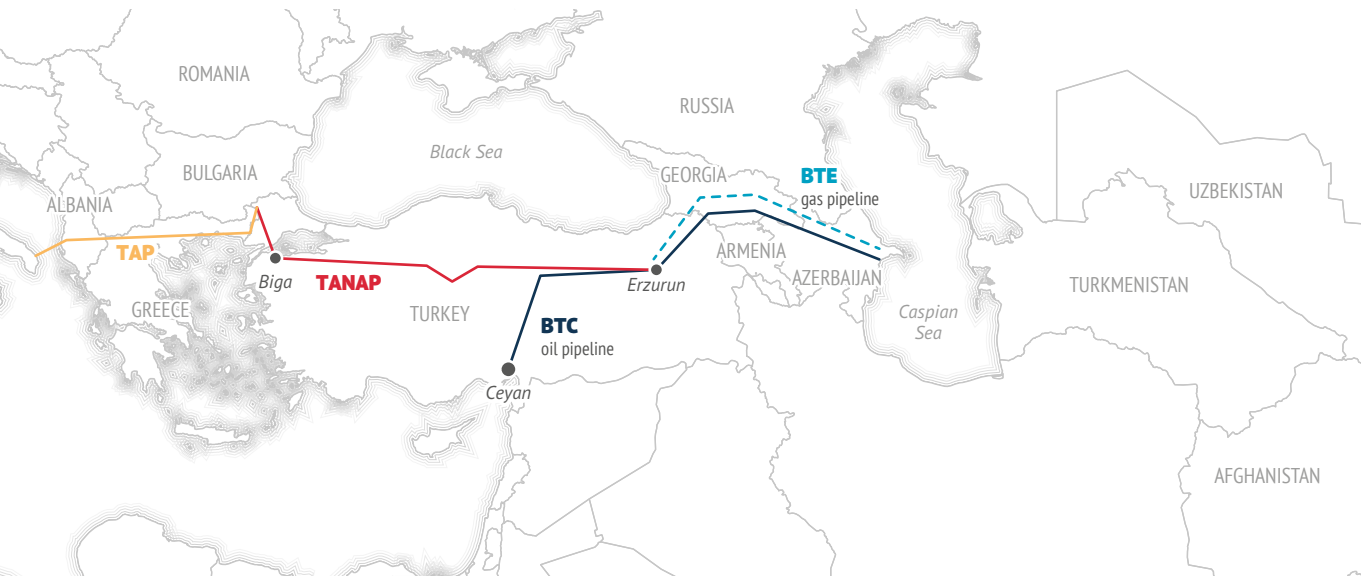
While Turkey and Russia ‘understand’ each other’s ambitious and opportunistic foreign policy behaviour and are usually able to mitigate their differences, Turkey’s aspiration to play a greater role in the Black Sea and the South Caucasus puts the relationship to the test on a regular basis. In comparison, in Central Asia both countries display a lower level of ambition and potential tensions are likely to be more easily defused – also due to the active regional presence of an increasingly powerful China. For the EU, Russo-Turkish ‘cooperative rivalry’ in the

post-Soviet neighbourhood creates formidable challenges – as was most recently witnessed in the Nagorno-Karabakh war. However, at the same time Turkey and the EU share many interests in the Black Sea region, such as enhancing the sovereignty of Georgia, Moldova and Ukraine, and advancing east-west connectivity projects that improve regional resilience also in Europe.

BETTING BIG IN THE SOUTH CAUCASUS

The South Caucasus is characterised by a complex web of enmities and amities, and conflicts reflecting and simultaneously amplifying those dividing lines. Turkey and Russia are the two main external actors in these regional constellations that build on historical, cultural, religious and ethnic issues and experiences but that have transformed significantly during the post-Soviet years. Turkey’s closest ally is Azerbaijan: the relationship between the two

Oil and gas pipelines from the South Caucasus to Turkey



Data: Worldpipelines, 2021; European Commission, 2021

is sometimes referred to as ‘one nation, two states’ ⁽¹⁾. This close alliance effectively rules out any significant bridge-building between Turkey and Armenia – which Azerbaijan regards as an archenemy – albeit this has been attempted half-heartedly from time to time ⁽²⁾.

Turkey has a pragmatic and multi-layered relationship with Georgia; energy, infrastructure and military cooperation rank among the priorities for both countries. These issues are central in the trilateral Azerbaijan-Georgia-Turkey (AGT) cooperation that has evolved dynamically since the building of the Baku-Tbilisi-Ceyhan (BTC) oil pipeline and the Baku-Tbilisi-Erzurum (BTE) gas pipeline (tapping into the TANAP gas pipeline running through Turkey) in the mid-2000s. In November 2020, the Trans Adriatic pipeline (TAP) was

inaugurated; this marked the completion of the entire Southern Gas Corridor stretching from the Caspian Sea all the way to Southern Italy – a major achievement and a long-time goal of both Turkey and Azerbaijan. The Southern Gas Corridor enhances European energy security and the project has been actively supported by the EU ⁽³⁾. The geopolitical nature of these projects is a given: they offer alternative routes to existing routes that cross Russian territory, and exclude the third South Caucasian state, Armenia.

Security and political cooperation deepened in the 2010s through the annual meetings of state leaders, foreign ministers and defence ministers. In particular, Georgia values current military cooperation and joint exercises with NATO –member Turkey – a country that has also

- (1) Turkey and Azerbaijan signed an Agreement on Strategic Partnership and Mutual Cooperation in 2010, which contains a security clause. See: “‘One nation, two states’: Turkey congratulates Azerbaijan on 101st Republic Day”, *Daily Sabah*, 29 May 2019 (<https://www.dailysabah.com/politics/2019/05/28/one-nation-two-states-turkey-congratulates-azerbaijan-on-101st-republic-day>).
- (2) Seibert, T., “‘Football diplomacy’ between Armenia and Turkey”, *The National*, 16 October 2009 (<https://www.thenationalnews.com/world/europe/football-diplomacy-between-armenia-and-turkey-1.513824>).
- (3) European Commission and the Republic of Azerbaijan, ‘Joint Declaration on the Southern Gas Corridor’, Baku, January 2011 (<http://gpf-europe.com/upload/iblock/bb6/20500c15d01.pdf>).

loudly voiced its support for Georgia's membership of NATO ⁽⁴⁾.

On a range of issues, Russia's interests and allies are diametrically opposite to Turkey's in the South Caucasus: as a close ally of Armenia and patron of separatist South Ossetia and Abkhazia (all three host Russian military bases), it is naturally opposed to Turkey's plans to expand its regional role and against evolving military cooperation between NATO and Georgia, or Turkey and Georgia.

Yet, in reality the picture is not quite so black and white. Turkey's ally Azerbaijan has close relations with Russia, and even Georgia – a country that *de facto* lost control of 20 % of its territory in the 2008 war – has significant economic ties with Russia ⁽⁵⁾. Although Turkey has not recognised Abkhazia's independence, it has close links with the breakaway region. The Abkhaz diaspora community in Turkey is interested in developing connections and doing business with Sukhumi. Even when the Abkhaz *de facto* government adopted sanctions against Turkey as a sign of support for Russia after the downing of the Su-24, most of the trade that was in the hands of the Abkhaz diaspora continued almost as before ⁽⁶⁾. This example demonstrates how developments in the Middle East are in practice connected with policies conducted in the South Caucasus, as well as how geopolitical tensions are often mediated by local connections and links that can be surprisingly resilient. Furthermore, following Nikol Pashinyan's

rise to power in 2018, Russia has been critical of Armenia's internal developments and its growing desire to gradually reduce its dependency on Russia. Despite their non-existent relations and closed borders, Turkish products found their way to Armenia via Georgia in significant numbers until recently ⁽⁷⁾.

The complexities and nuances of Russian-Turkish relations in the region were vividly demonstrated during the second Nagorno-Karabakh war and the way the fighting was eventually brought to a halt. The build-up to the war started already in July 2020 when skirmishes between Azerbaijan and Armenia temporarily picked up. Subsequently, Russia and Armenia as well as Turkey and Azerbaijan held a series of military drills, foreshadowing more trouble. In late September, Azerbaijan – backed by Turkey – launched an offensive into Karabakh and the regions around it. Heavy infighting ensued causing more than 5 000 fatalities ⁽⁸⁾. Despite being allies of the opposing sides in the conflict, the Russian and Turkish top leadership had regular phone conversations throughout the war ⁽⁹⁾ – a pattern that can also be observed in Syria and in Libya. After failed international negotiation attempts, the Russian president brokered a ceasefire that was signed by the leaders of Armenia, Azerbaijan and Russia ⁽¹⁰⁾. Although Turkey was not one of the signatories, it was kept in the loop throughout the process, unlike the US and France, and it negotiated behind the scenes with Azerbaijan and Russia.

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- (4) Reuters, 'Turkish foreign minister calls for enlarged NATO, Georgia membership', 23 January 2020 (<https://www.reuters.com/article/us-davos-meeting-turkey-georgia/turkish-foreign-minister-calls-for-enlarged-nato-georgia-membership-idUSKBN1ZM1HB>); Avdaliani, E., 'Turkey Seeks to Counter Russia in the Black Sea-Caucasus Region', *The Turkey Analyst*, 5 October 2020 (<https://www.turkeyanalyst.org/publications/turkey-analyst-articles/item/652-turkey-s-commitment-to-azerbaijan-s-defense-shows-the-limits-of-ankara-s-tilt-to-moscow.html>).
 - (5) Transparency International, 'Georgia's economic dependence on Russia: trends and threats', 4 May 2020 (<https://transparency.ge/en/blog/georgias-economic-dependence-russia-trends-and-threats>).
 - (6) Weiss, A. and Zabanova, Y., 'Georgia and Abkhazia Caught between Turkey and Russia', SWP Comment 2016/C 54, December 2016, p. 4 (<https://www.swp-berlin.org/en/publication/georgia-and-abkhazia-caught-between-turkey-and-russia/>).
 - (7) Mejlumyan, A., 'Armenia prepares to ban Turkish imports', Eurasianet, 16 December 2020 (<https://eurasianet.org/armenia-prepares-to-ban-turkish-imports>).
 - (8) BBC News, 'Nagorno-Karabakh conflict killed 5,000 soldiers', 3 December 2020 (<https://www.bbc.com/news/world-europe-55174211>).
 - (9) Özertem, H.S., 'Turkish-Russian Relations Before and After the Six-Week War in the Caucasus', *Valdai*, 10 December 2020 (<https://valdaiclub.com/a/highlights/turkish-russian-relations-before-and-after/>).
 - (10) President of Russia, Replies to media questions on developments in Nagorno-Karabakh, Moscow, 17 November 2020 (<http://en.kremlin.ru/events/president/news/64431>).

According to the agreement the parties to the conflict were to cease fighting: Armenia was to pull out from the territories surrounding Nagorno-Karabakh that it had occupied since 1994, whereas Azerbaijan halted its military advance inside Nagorno-Karabakh. Furthermore, the belligerent parties agreed that Azerbaijan would gain land access via Armenia to its Nakhichevan enclave next to Turkey and Iran. 2 000 Russian peacekeepers were to be deployed for at least five years to ensure the post-war *status quo*. Russia agreed to involve Turkey in the work of a joint monitoring centre that was established on the territory of Azerbaijan⁽¹¹⁾. France and the United States – both co-chairs of the OSCE's Minsk Group that has been the primary body in the decades-long quest for a peace settlement to the conflict – were excluded from the process and even from the future monitoring mechanism.

It seems that Russia is ready to accept a greater role – albeit limited and for now – for Turkey in the South Caucasus if it can simultaneously advance its own strategic priorities on other fronts. As a result of the conflict Russia re-established a military presence in Azerbaijan (it had been evicted from Gabala in 2012), and Turkey got to keep a foothold in the region in the form of the joint monitoring centre.

Russia performed the role of a mediator by balancing carefully between Azerbaijan and Armenia; by doing this, it established a military presence in the form of peacekeepers in the conflict zone – a proposal that had been rejected earlier both by Yerevan and Baku – and it also pushed Armenia into deeper dependency

on Moscow as Russia will now control the border with Azerbaijan as well as the road to Nakhichevan. Perhaps most importantly, Russia's key role in the mediation process highlighted the marginalisation of the western powers in the region and contrasted that with Moscow's own ability to achieve concrete results. Turkey and Azerbaijan strengthened their positions considerably through the conflict but this would have not been achievable without Russia's implicit or explicit approval and both states were mindful of this⁽¹²⁾.

The war seems to confirm some changes in the regional roles of both countries. First of all, it highlights that Turkey has come a long way from its 'zero problems with neighbours policy' and the emphasis on mediation of conflicts that characterised its stance in the early 2010s⁽¹³⁾. Turkey's policy in the war was re-

markably assertive: it deployed Russian-style tactics – such as use of mercenaries – and it acted without coordinating with its fellow NATO members. Turkey achieved its long-term goal and carved out a role for itself in the management of the Nagorno-Karabakh conflict through its active military support to Azerbaijan, not by appeals to and negotiations with the Western co-chairs of the Minsk Group. Unhappy with its modest role as an ordinary member of the Minsk Group,

Turkey has been pushing for a 2+2 formula – Russia and Armenia on one side, and Azerbaijan and Turkey on the other. After the situation on the ground had been reshaped by force, Turkey restated its desire to establish a regional stability organisation that would essentially bring the major regional powers – Turkey and Russia

Russia is ready to accept a greater role for Turkey in the South Caucasus if it can simultaneously advance its own strategic priorities on other fronts.

(11) Turkish monitors will be deployed at the Centre for at least one year, and they will perform the same tasks as their Russian counterparts. See: Caspian News, 'Turkey, Russia finalized negotiations for creating joint monitoring centre in Azerbaijan's Karabakh region', 3 December 2020 (<https://caspiannews.com/news-detail/turkey-russia-finalized-negotiations-for-creating-joint-monitoring-center-in-azerbaijans-karabakh-region-2020-12-3-0/>).

(12) Kuchera, J., 'Russia and Turkey Open Joint Military Center in Azerbaijan', Eurasianet, 2 February 2021 (<https://eurasianet.org/russia-and-turkey-open-joint-military-center-in-azerbaijan>).

(13) Ministry of Foreign Affairs, Republic of Turkey, 'Policy of Zero Problems with our Neighbor' (<https://www.mfa.gov.tr/policy-of-zero-problems-with-our-neighbors.en.mfa>).

and Iran – and the three South Caucasus states around the same table. Regardless of its success, the initiative reveals Turkey's vision of a condominium of regional great powers taking charge of security in the region without the involvement of extra-regional powers⁽¹⁴⁾.

In the case of Russia, the outcome of the war and the ceasefire negotiations indicate Moscow's increasing pragmatism in the region and ability to make careful calculations based on securing key interests and readiness to compromise at least on second-tier issues, where its key interests are not directly at stake⁽¹⁵⁾. The way in which the ceasefire was established and monitoring organised highlighted the status of both Russia and Turkey as autonomous great powers managing the relations of their smaller neighbours without the involvement of any Western powers or institutions. This, indeed, is a vision that greatly appeals to the leaders of both countries and one that they undoubtedly will both try to promote in their future policies. This naturally does not exclude competition between them but still highlights the simultaneous processes of competing together as well as against each other in different forums and on different levels.

The second Nagorno-Karabakh war demonstrated the failure of international mediation efforts and the decline of Western powers' significance in the security of the region. The co-chairs of the Minsk Group were pushed to the sidelines and neither the United States nor France had a role in the events or their aftermath. Coercion and great power politics shaped the reality on the ground.

COMPETITION IN THE BLACK SEA

The Black Sea is economically and strategically a lifeline for both Russia and Turkey. They both depend on the smooth functioning of the crucially important shipping lines, energy pipelines and cables that cross the sea. Turkey controls access to and from the Black Sea through the Bosphorus, and after its annexation of Crimea in 2014, Russia dominates militarily in the Black Sea. The Black Sea grants access to the Azov Sea and, via the Volga-Don canal, to the Caspian Sea, and facilitates military deployments in neighbouring regions such as the Eastern Mediterranean and the Middle East; the Russian 'Syrian express' – a supply line for naval deliveries from Russia to Syria runs through the sea – highlights the interconnections between different regions⁽¹⁶⁾.

Since the end of the Cold War, the balance of power around the sea has shifted remarkably. At the end of the Cold War there was a general perception of diminished threat, and a shared desire to develop cooperation and infrastructure among the littoral states with a focus on increasing trade and prosperity. During this time Turkey's policy focused on the advancement of 'peace, stability and prosperity'⁽¹⁷⁾ through initiatives such as the Organisation of the Black Sea Economic Cooperation (BSEC). Turkey advocated inclusive security cooperation among the littoral states for instance through its Black Sea Naval Cooperation Task Group (BlackSeaFor) initiative in 2001 and by inviting all littoral states to take part in Black Sea Harmony – a naval operation against unconventional threats and terrorism in the Black

(14) 'Turkey proposes 6-way Caucasus platform for peace and stability', *Daily News*, 11 December 2020 (<https://www.hurriyetdailynews.com/turkey-to-be-patient-and-see-what-trend-emerges-after-biden-takes-office-erdogan-160776>); Seskuria, N., 'Challenges of a Six-Country Regional Cooperation Platform for Georgia', Middle East Institute, 3 February 2021 (<https://www.mei.edu/publications/challenges-six-country-regional-cooperation-platform-georgia>).

(15) Trenin, D., 'Moscow's New Rules', Carnegie Moscow Center, 11 November 2020 (<https://carnegie.ru/commentary/83208>).

(16) Al-Monitor, 'Despite tensions, Russia's "Syria Express" sails by Istanbul', 10 April 2018 (<https://www.al-monitor.com/pulse/afr/2016/01/syria-conflict-turkey-russia-navy.html>).

(17) Turkish Defence Ministry, *Defence White Paper*, August 2000 (https://www.files.ethz.ch/isn/154907/Turkey_2000eng.pdf).

Sea ⁽¹⁸⁾. Turkey saw inclusive littoral security cooperation as a preferred alternative to NATO-led frameworks.

Despite Bulgaria's and Romania's accession to NATO in 2004, the alliance's role in the Black Sea has remained limited ⁽¹⁹⁾. In the spirit and letter of the Montreux Convention of 1936, Turkey has preferred to keep extra-regional powers out of the Black Sea – a position it shares with Russia ⁽²⁰⁾. While the new NATO members did not significantly alter the military balance in the Black Sea region, Russia's insecurity about the future of its regional dominance increased, and was reflected in its policy decisions. In essence, the sea was a condominium shared between Russia and Turkey until Russia's illegal annexation of Crimea.

Turkey's policy towards Russia in the Black Sea in a conflict situation was first tested in August 2008 when Russia went to war with Georgia. While officially supporting the territorial integrity of Georgia, Turkey observed a neutral policy stance that included denying access to large American hospital vessels offering humanitarian aid to Georgia. Although Turkey's relative military role in the Black Sea has decreased significantly as a consequence of Russia's military action in Georgia and later in Ukraine, its reaction has so far been cautious and carefully weighed.

The opportunity to cement Russia's military dominance in the Black Sea was a key consideration in Russia's decision to seize Crimea

in 2014. Since then, Moscow has drastically upgraded its military capabilities in the region: Russia took over part of Ukraine's navy

in Crimea, and modernised and strengthened its own Black Sea Fleet and forces around the Sea. The Black Sea Fleet is now approximately 25 000-strong and is estimated to consist of 21 major combat ships and 7 submarines and over 200 support vessels ⁽²¹⁾. The Russian military presence in Crimea also includes significant land and air forces. The most important land-based weapons deployed in Crimea are

long-range coastal- and air-defence missile systems, which cover almost the entire Black Sea ⁽²²⁾. In addition to these extensive defensive capabilities, it also has significant offensive capabilities. Its ballistic Kalibr missiles are capable of delivering precision strikes and it may already have Iskander missiles capable of carrying both conventional and nuclear warheads ⁽²³⁾. With these reinforcements, Russia has significant anti-access/area denial capabilities in the Black Sea and is able to assert its military supremacy in the region.

Although these developments are not positive from Turkey's perspective, its reaction has been carefully measured. It has continued to emphasise the importance of the Montreux Convention and its principle of limiting the presence of non-littoral military vessels in the Black Sea. It has not imposed any sanctions against Russia due to the annexation of Crimea (which it considers illegal). However, it has taken part in NATO's Tailored Forward Presence (TFP) that strengthens NATO's presence

The Black Sea was a condominium shared between Russia and Turkey until Russia's illegal annexation of Crimea.

(18) Alejandro Sanchez, W.A., 'Did BLACKSEAFOR Ever Have a Chance?', *E-International Relations*, 18 November 2012 (<https://www.e-ir.info/pdf/30012>).

(19) This despite the active lobbying of Romania to the contrary: Reuters, 'Romania hopes for regional prominence after NATO', 31 March 2008 (<https://www.reuters.com/article/us-nato-romania-idUSL3167289920080331>).

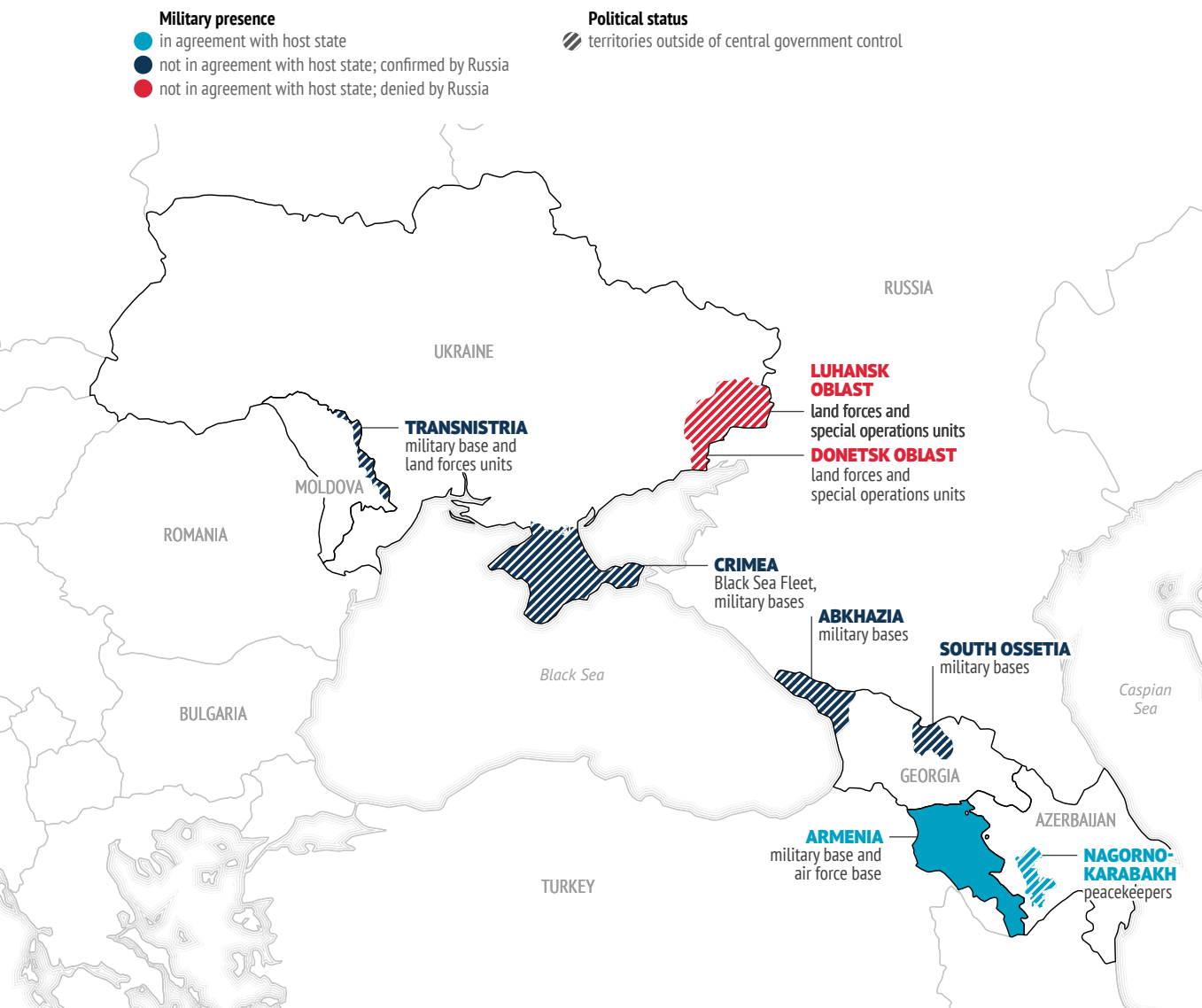
(20) Toucas, B., 'Turkey has no Allies in the Black Sea, only interests', Center for Strategic and International Studies (CSIS), 13 February 2018 (<https://www.csis.org/analysis/turkey-has-no-allies-black-sea-only-interests>).

(21) Kuimova, A. and Wezeman, S.T., 'Russia and Black Sea Security', Stockholm International Peace Research Institute (SIPRI), December 2018 (<https://www.sipri.org/publications/2018/sipri-background-papers/russia-and-black-sea-security>).

(22) Ibid.

(23) Peck, M., 'Russia's Iskander Missiles Are a Real Threat to NATO's Navies', *The National Interest*, 18 September 2019 (<https://nationalinterest.org/blog/buzz/russias-iskander-missiles-are-real-threat-natos-navies-81506>).

Russian military presence in the Black Sea region



EUISS, 2020; Reddit.com, 2021; GADM, 2020; Natural Earth, 2020

in the southeastern part of the Alliance territory as a response to increased Russian military activity in the Black Sea region by contributing troops to the framework brigade in Romania and patrolling NATO aircraft flights in the Black Sea ⁽²⁴⁾. Furthermore, Turkey has actively developed military-technical cooperation with

Ukraine. For instance in 2019, the Turkish arms manufacturer Baykar Makina and the Ukrainian Ukrpetrskport signed an agreement to create a consortium for the production of modern weapon systems, while Ukraine has procured sophisticated Turkish military equipment. Furthermore, Erdoğan has actively supported

(24) NATO, 'Boosting NATO's presence in the east and southeast', 20 October 2020 (https://www.nato.int/cps/en/natohq/topics_136388.htm).

Ukraine's bid for NATO membership, and assisted Ukraine in meeting the criteria and enhancing the interoperability of the Ukrainian and NATO forces, including through military exercises. In the face of increasing tensions between Russia and Ukraine in spring 2021, Russian foreign minister Sergei Lavrov raised concern about Turkey's military support to Ukraine⁽²⁵⁾. Turkey has also taken up the situation of Crimean Tatars with Russia and has attempted to mediate between Russia and the Turkic minority in Crimea.

Yet, simultaneously with these measures, Turkey has cooperated with Russia on Black Sea natural gas pipelines and defence procurement. Despite taking part in NATO's TFP, Turkey wants to deal with Russia and its military posture primarily on its own and does not shy away from close cooperation with Russia. Turkey's relationship with NATO and the US is increasingly strained – in particular due to Ankara's acquisition of the S-400 surface-to-air missiles system from Russia in 2017 – which led to US sanctions against Turkey's defence procurement agency⁽²⁶⁾. To an extent, Turkey seems ready to accept Russia's dominance as long as Russia does not present a direct threat to Turkey in the region.

The Black Sea pipeline projects and energy co-operation represent a similarly complex picture. While Turkey has attempted to reduce its gas dependency on Russia by building horizontal pipelines running from the Caspian to the Black Sea and the Mediterranean, it has also closely cooperated with Russia, its main gas

provider, on other pipeline projects, such as the newly inaugurated TurkStream – among the key motivations of which is to bypass Ukraine. Hence, Turkish-Russian relations in the Black Sea appear to be as complicated and nuanced as in the South Caucasus: despite belonging to different 'camps' and having divergent interests, the countries often find each other useful in their self-interested tactical manoeuvrings.

These tactical manoeuvrings and bilateral behind-the-scenes deals are often a challenge

for the slow-moving EU who would prefer to develop its relationship with Turkey and Russia more consistently. Instead of a more systematic approach, the EU has had to accept the situation and negotiate separate, partial solutions on an *ad hoc* basis, as was – for instance – the case after the outbreak of the migration crisis in 2015⁽²⁷⁾. Turkey's and Russia's resort to murky hybrid tactics – for instance, unofficial campaigns to

encourage migrants to head towards a specific EU border or the use of mercenaries in conflicts – creates further tensions. So far, the EU has highlighted its desire to have 'a strong and frank dialogue on the regional conflicts and develop a greater common understanding on how to address them in a manner that will respect mutual interests' with Turkey⁽²⁸⁾; and no doubt the same applies to Russia, albeit expectations regarding results are likely to be lower. However, patience with the unpredictable tactics of NATO member Turkey is wearing increasingly thin in many NATO and EU member states.

Patience with the unpredictable tactics of NATO member Turkey is wearing increasingly thin in many NATO and EU member states.

(25) Ahval, 'Russia warns Turkey over drone deliveries to Ukraine', 12 April 2021 (<https://ahvalnews.com/ukraine-russia/russia-warns-turkey-over-drone-deliveries-ukraine>).

(26) Seldin, J., 'US Slams Turkey for S-400 Tests, Warns of "Serious Consequences"', VOA News, 23 October 2020 (<https://www.voanews.com/europe/us-slams-turkey-s-400-tests-warns-serious-consequences>); US Department of State, 'CAATSA Section 231: Imposition of sanctions on Turkish presidency of defense industries', Office of the Spokesperson, Fact Sheet, 14 December 2020 (<https://2017-2021.state.gov/caatasa-section-231-imposition-of-sanctions-on-turkish-presidency-of-defense-industries/index.html>).

(27) The EU-Turkey Joint Action Plan was activated on 29 November 2015.

(28) HR/VP Josep Borrell, 'The way ahead after a difficult 2020 for EU-Turkey relations', European External Action Service (EEAS), 18 December 2020 (https://eeas.europa.eu/headquarters/headquarters-homepage/90861/way-ahead-after-difficult-2020-eu-turkey-relations-%C2%A0_en).

An emerging authoritarian triangle in Central Asia?

Apart from Tajikistan, Central Asia is dominated by Turkic languages and ethnic groups and the Islamic religion. Following the collapse of the Soviet Union, Turkey was quick to reach out to the region in support of these culturally and ethnically close nations. In the mid-1990s it became evident that Turkey's political significance and soft power appeal did not quite suffice to endow it with a decisive role even in Central Asia – although it played an important role in specific questions like the return of Crimean Tatars and Meskhetian Turks to their homelands. Despite the failure of the pan-Turkic policy experiment, Turkey has developed a realistic yet ambitious strategy towards the region over the years. Today, this approach emphasises infrastructure projects and economic interests, developing bilateral relations on the basis of respect for the *status quo*, as well as an array of soft power initiatives.

It is practically impossible to analyse Turkish-Russian interaction in Central Asia without taking into account China. An interesting dynamic has developed in the region: although Turkey, Russia and China are all actively engaged in Central Asia, no 'great game' type of geopolitical competition has emerged. Rather, the three seem to accept and accommodate each other's respective profiles in the region: China has unparalleled resources, the biggest economy and the highest international status; Russia is the dominant security actor in the region that has the closest links with Central Asian elites and peoples alike; and Turkey

has its own niche that combines pragmatic economic ties and ethno-cultural linkages.

The logic of China's Belt and Road Initiative (BRI) is inclusive: the massive scale of the project has attracted the participation of a large number of countries, and China sets the terms of engagement without trying to exclude actors. Beijing's approach seems to encourage other actors to maximise their regional interests in Central Asia while trying to tap into and benefit from China's grand projects. Hence, the leaders of Turkey and Russia emphasise the complementarity of their regional projects to the BRI: Turkey's 'Middle Corridor' ⁽²⁹⁾ and 'Asia Anew' initiative ⁽³⁰⁾ and Russia's Eurasian Economic Union (EAEU). An accommodative approach is likely to be easier for Turkey than for Russia – a country that was once the unquestioned power in this region and whose logic of action is typically a more exclusive one.

Although Russia may have lost its 'connectivity advantage' inherited from Soviet times to China, it still plays an important political and security role in the region. Even economically its role is significant and could possibly strengthen in future: Uzbekistan joined as an observer in the EAEU in 2020 and has pledged to become a full member by 2025 ⁽³¹⁾. Among Russia's many advantages in the region are the close personal connections between intertwined political and business elites, and Russia continues to be the most popular destination for Central Asian students ⁽³²⁾. Furthermore, an estimated 2.7 to 4 million labour migrants from Central Asia work in Russia and, for instance, remittances from Russia make up some 30 % of the GDP of Kyrgyzstan and Tajikistan ⁽³³⁾. Despite considerable discrimination against Central Asian migrants,

(29) Erdogan, R.T., 'Turkey, China share a vision for future', *Global Times*, 1 July 2019 (<https://www.globaltimes.cn/content/1156357.shtml>).

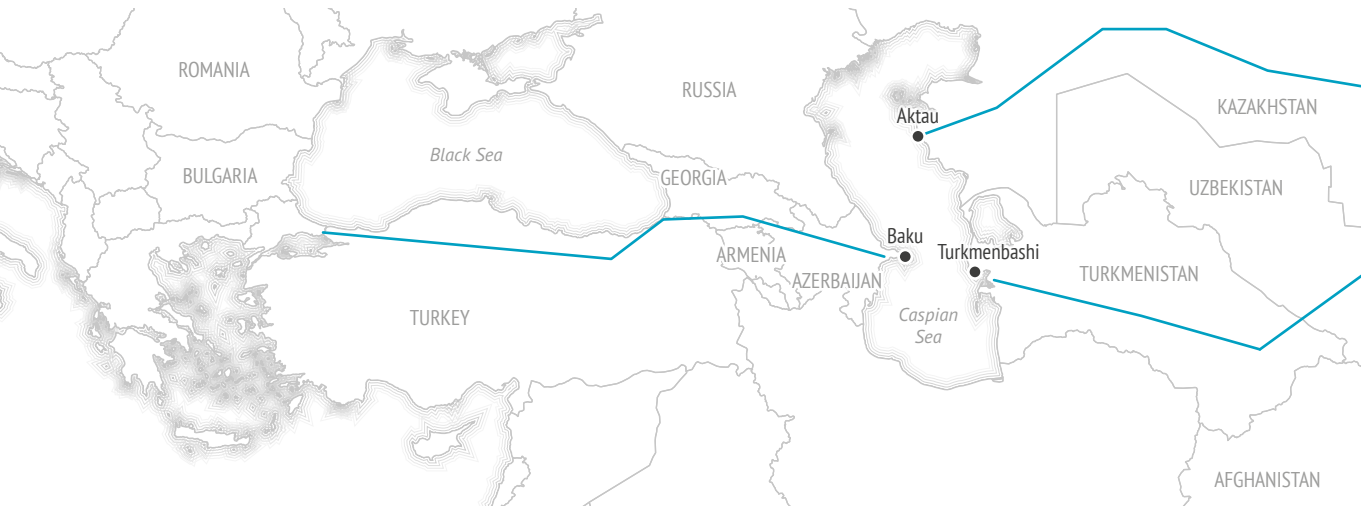
(30) 'Asia Anew: Initiative to shape future of Turkish diplomacy', *Daily Sabah*, 11 August 2019 (https://www.dailysabah.com/diplomacy/2019/08/10/asia-anew-initiative-to-shape-future-of-turkish-diplomacy?gallery_image=undefined#big).

(31) Hashimova, U., 'Uzbekistan Joins Online Eurasian Economic Union Meeting as an Observer', *The Diplomat*, 14 December 2020 (<https://thediplomat.com/2020/12/uzbekistan-joins-online-eurasian-economic-union-meeting-as-an-observer/>).

(32) Umarov, T., 'China Looms Large in Central Asia', Carnegie Moscow Center, 30 March 2020 (<https://carnegie.ru/commentary/81402>); Peleschuk, D., 'Why foreign students are flocking to Russia', *Eurasianet*, 25 February 2019 (<https://eurasianet.org/why-foreign-students-are-flocking-to-russia>).

(33) Saari, S., 'Connecting the dots: challenges to EU connectivity in Central Asia', *Brief no. 6*, EUISS, June 2019 (<https://www.iss.europa.eu/content/connecting-dots-challenges-eu-connectivity-central-asia>).

The Middle Corridor transport route



Data: Ministry of Foreign Affairs of Turkey, 2018; European Commission, 2021

Russia still wields genuine soft power due to deep cultural, political and societal ties with Central Asia.

Turkish infrastructure projects benefit the region by creating alternative routes to European markets; for instance, the BTC crude oil pipeline has been transporting oil from Kazakhstan since late 2008 and from Turkmenistan since 2010. In early 2021, Azerbaijan and Turkmenistan settled a long-running gasfield dispute and agreed to develop a *Dostlug* ('friendship') gasfield together. This deal could open up larger scale transit for Turkmenistan gas to the European markets⁽³⁴⁾.

Although Turkey does not rank among Kazakhstan's closest trading partners, their political cooperation is institutionalised⁽³⁵⁾ and Turkey is a significant foreign investor in the country. For instance, over 4 200 companies

with Turkish capital are registered in Kazakhstan⁽³⁶⁾. Furthermore, the countries maintain close educational cooperation: there are at least two Turkish universities and dozens of Kazakh-Turkish high schools in Kazakhstan and many Kazakhs study in Turkey. In 2009 Azerbaijan, Kazakhstan, Kyrgyzstan and Turkey signed the Nakhchivan Agreement which institutionalised the Turkic-speaking states' summits that had taken place already since 1992 into a Turkic Council. After significant political changes took place in the country, Uzbekistan joined the Turkic Council in 2019. Furthermore, Turkey is interested in developing a more prominent role in Asia at large through its Asia Anew initiative; this too underscores the strategic significance of the Central Asian states for Turkey⁽³⁷⁾.

There seems to be an element of ideology underpinning cooperation between China, Turkey

(34) O Byrne, D., 'Azerbaijan and Turkmenistan agreement advances Caspian gas cooperation', Eurasianet, 22 January 2021 (<https://eurasianet.org/azerbaijan-and-turkmenistan-agreement-advances-caspian-gas-cooperation>).

(35) The Strategic Partnership Agreement between Turkey and Kazakhstan was signed on October 2009. The High Level Strategic Cooperation Council between Turkey and Kazakhstan was established in May 2012 (<https://www.mfa.gov.tr/relations-between-turkey-and-kazakhstan.en.mfa>).

(36) 'Kazakh, Turkish businesses ink deals worth \$1.5 billion', *The Astana Times*, 14 November 2019 (<https://astanatimes.com/2019/11/kazakh-turkish-businesses-ink-deals-worth-1-5-billion/>).

(37) Anadolu Agency, 'Turkey, Azerbaijan, Turkmenistan cooperation benefits region', 23 February 2021 (<https://www.aa.com.tr/en/politics/-turkey-azerbaijan-turkmenistan-cooperation-benefits-region-/2154780>).

and Russia – and one that also resonates particularly well with many Central Asian leaders. In their political discourse all of them emphasise the need for a post-Western multipolar world order and identify with the rising challengers of the old order⁽³⁸⁾. In Turkey's case, this discourse is rooted in growing anti-Westernism that has increased substantially since the early 2010s. It appears that this bigger goal – and mutually traded favours – compensate for the smaller sacrifices and omissions; for instance, Ankara has refused to condemn Beijing for its treatment of the Uighur Muslim minority while getting a deal on the Chinese Covid-19 vaccine⁽³⁹⁾.

Hence, despite their different logics and competitive dynamics, the goals of preserving the *status quo*, and ensuring security and stability in Central Asia unite Moscow, Ankara and Beijing. Accordingly, all three have shown both the willingness and ability to accommodate each other's interests in Central Asia in recent years. Despite different priorities and visions of connectivity, it is not likely that the 'authoritarian triangle' will pose a direct challenge to the EU's vision of comprehensive, sustainable and rules-based connectivity in the region⁽⁴⁰⁾. First of all, in the field of trade, there is considerable overlap between the EU's and Turkey's interests. Secondly, the three external powers are interested in stability and growing prosperity in the region and their policies are based on co-operation and engagement with Central Asian governments rather than coercion. All Central Asian governments, on the other hand, are interested in balancing their dependencies by

developing cooperation with multiple actors, and finally also overcoming long-standing rivalries with their immediate neighbours. Hence, Turkish-Russian relations as well as their relations with the EU in Central Asia seem the least problematic in this neighbourhood, out of the three post-Soviet sub-regions studied in this chapter.

CONCLUSION

The goals and interests of Russian and Turkey in the post-Soviet neighbourhood differ remarkably and are sometimes directly opposite. While the fact that both states are ambitious and ready to take risks in the same neighbourhood creates tension in the relations between them, they share an understanding of the nature of the relationship and its inherent limits. There is a certain degree of trust between them that derives from the fact that their expectations of each other and reality match. Furthermore, a clear asymmetry in their relations clarifies the marching order in the post-Soviet region: Russia's economy, military might and political power is far superior to that of Turkey.

Turkey's and Russia's adventurist policies in the post-Soviet region – in particular in the Black Sea and South Caucasus – are not likely to change as long as Erdoğan and Putin remain in power, and quite likely not immediately after that either. A key reason for this conclusion is the fact that the aggressive, expansionary

A clear asymmetry in Russo-Turkish relations clarifies the marching order in the post-Soviet region.

(38) Erdogan, R.T., 'Turkey, China share a vision for future', *Global Times*, 1 July 2019 (<https://www.globaltimes.cn/content/1156357.shtml>); Ministry of Foreign Affairs of the Russian Federation, 'Foreign Policy Concept of the Russian Federation', 1 December 2016 (https://www.mid.ru/en/foreign_policy/official_documents/-/asset_publisher/CptlCk6BZ29/content/id/2542248); Ministry of Foreign Affairs of the People's Republic of China, 'China's Foreign Policy in a Fast Changing World: Mission and Responsibility', 8 July 2019 (https://www.fmprc.gov.cn/mfa_eng/wjdt_665385/zjyh_665391/t1679454.shtml).

(39) Tavsan, S., 'Turkey accused of trading Uighurs for Chinese vaccine', *Asia Nikkei*, 14 January 2021 (<https://asia.nikkei.com/Politics/International-relations/Turkey-accused-of-trading-Uighurs-for-Chinese-vaccine>).

(40) European Commission, Joint Communication to the European Parliament, the Council, the European Economic and Social Committee, the Committee of the Regions and the European Investment Bank, 'Connecting Europe and Asia – Building blocks for an EU strategy', 19 September 2018 (https://eeas.europa.eu/sites/default/files/joint_communication_-_connecting_europe_and_asia_-_building_blocks_for_an_eu_strategy_2018-09-19.pdf).

foreign policies of both Turkey and Russia are interpreted as great successes in both countries and by and large command domestic support. For instance, Turkey achieved a significant role in the Nagorno-Karabakh conflict through its military aid and engagement – something that it had been trying to achieve for decades by more peaceful and cooperative means. On the other hand, Russia's military achieved a dominant position in the Black Sea due to its illegal annexation of Crimea.

Both Turkey and Russia have a vested interest in ruling out a major role for Europe in the field of security in these neighbourhoods. While Turkey seeks to restrict Russia's dominance in the Black Sea via coordinated NATO action, it is ready to negotiate directly with Russia without NATO coordination on most security issues in the post-Soviet region. Sometimes, as is the case with Turkey's deepening security cooperation with Ukraine and Georgia, Turkey's and the EU's security-related goals overlap. Cooperation or coordination will, however, remain limited, securing maximum room for manoeuvre for Turkey. The EU's approach of promoting peaceful settlement of disputes through slow-moving multilateral negotiations in the region is likely to continue to be challenged. It is realistic to assume that alone the EU will be outplayed by Russia and Turkey's assertive policies in the region. Thus, when it comes to post-Soviet security issues, coordinating policies with the United States will continue to be crucial for the EU.

However, in the field of trade and – in particular – in the field of energy, Turkey's and the EU's agendas in the South Caucasus, the Black Sea and Central Asia are more complementary and in these domains EU-Turkey cooperation is likely to continue. Turkey's development of east-west energy networks relies on Western companies and their investments.

Nevertheless, the EU should be prepared for Turkish-Russian *détente* in the post-Soviet region for quite a while. At least as long as Russia considers that it can advance its key foreign policy goals by dealing directly with Turkey and bypassing Western institutions and states, a major conflict between Turkey

and Russia seems unlikely in this region. If and when this careful balance is disturbed – for instance should Erdoğan be replaced by a more Western-leaning leader – the tensions between Turkey and Russia could grow.

CHAPTER 4

RUSSIA AND TURKEY IN THE MIDDLE EAST AND NORTH AFRICA

Navigating between war and peace

by
DIMITAR BECHEV

The Middle East and North Africa was once a sideshow in Russian-Turkish relations. In the 2000s, while Turkey pursued its 'zero-problems with neighbours' policy and Russia resuscitated Cold War-era ties and forged new partnerships in that part of the world, their paths rarely crossed. These days, the opposite is true; since the Arab Spring, the region has moved right to the centre of the Russian-Turkish agenda. Russia's intervention in Syria in 2015 triggered a vicious conflict bringing Moscow and Ankara close to the brink. Soon enough, however, Erdoğan and Putin oversaw a U-turn towards security cooperation on an unprecedented scale. Nowadays, some of the starkest examples of Russia and Turkey's 'cooperative rivalry' are to be observed in the Middle East and North Africa. Ankara and Moscow are simultaneously competing and working together, engaging at the diplomatic level while also applying military force to extract concessions from each other. That is true of both Syria and Libya where Russia and Turkey have been navigating the grey zone between war and peace. Over the course of 2020, they changed gears from diplomatic talks to indirect conflict and back. In both cases, Putin and Erdoğan stopped short

of head-on confrontation with unpredictable consequences.

What are the strategic interests driving Russian-Turkish relations in the Middle East and North Africa? How do Moscow and Ankara engage with each other to maximise shared objectives and manage conflicts? This chapter explores those questions while also mapping out the implications for the EU's presence in its southern neighbourhood.

A POST-AMERICAN MIDDLE EAST

Previous chapters in this volume have highlighted a variety of issues and factors that draw Turkey and Russia together, ranging from economic interests to overlapping security concerns, to affinities between the country's leaders and models of governance. In the Middle East and North Africa, the Russian-Turkish interplay is largely a reflection of the region's

shifting geopolitics. Moscow's and Ankara's actions come as a response to developments originating from the states and societies in the area but also the policy pursued by the United States, traditionally the predominant power in the Middle East. Both Bush-era interventionism and (selective) disengagement in the 2010s have had significant implications. Having opposed American unilateralism, Russia and Turkey have filled the gap – each in its own way – resulting from the retrenchment pursued by both the Obama and the Trump administrations.

Starting from the Iraq War of 2003, Turkey gradually came to see America, its main ally within NATO, as a destabilising force on its doorstep. The architects of the 'zero-problems with neighbours' doctrine projected Turkey as an alternative, benign hegemon with organic links to the region, capable of inspiring positive change. Facets of this policy ran counter to Western preferences. To the United States' dismay, the AKP also reached out to the so-called Axis of Resistance composed of Iran, Assad's Syria and Hamas and turned away from Israel. The Arab Spring deepened the rift between Ankara and Washington. Obama's refusal to take action against the Syrian regime, i.e., the chemical weapons 'red line crisis' of August–September 2013, and alignment with Kurds affiliated with the outlawed Kurdistan Workers' Party (PKK) in the struggle against the self-styled Islamic State, bred resentment and distrust. Erdoğan looked for alternative partners and ultimately found one in Russia. In August 2016, Putin gave the green light to Turkey to enter Syria and carve out a buffer zone to keep the Kurdish militants in check. The Turkish armed forces' cross-border operations boosted Erdoğan's popularity at a critical juncture when he was tightening his grip on power domestically in

the aftermath of the abortive coup. Thus, Russia became an indispensable partner while the United States stood accused of supporting Turkey's sworn enemies.

Russia, too, extracted geopolitical mileage from regional shifts. A vocal critic of US hegemony who had worked to return Russia to the Middle East ⁽¹⁾, Putin exploited Western passivity in the face of the upheavals of the 2010s. He presided over a light-touch intervention in Syria, reaping extensive political benefits without taking excessive risks. Indeed, Russia teamed up with Iran to save the Assad regime teetering on the verge of collapse in 2015. Top-tier regional players such as Turkey, Saudi Arabia and Israel engaged with the Kremlin. In effect, Moscow

The Russian-Turkish interplay is largely a reflection of the region's shifting geopolitics.

asserted itself as a powerbroker in a strategically important part of the world, rivalling the US without incurring a comparable price in blood and treasure ⁽²⁾. Turkey certainly helped the Kremlin in that endeavour. Together with Iran, it joined Russia in the so-called Astana Forum on Syria which, unlike the UN-sponsored talks in Geneva,

excluded the Americans. Similar to Moscow, Ankara remained supportive of the Iran nuclear deal, or the Joint Comprehensive Plan of Action (JCPOA), and took exception to Trump's policy of exerting 'maximum pressure' on Tehran. Thus, Russia and Turkey seemed to embrace a vision of the Middle East and North Africa in radical opposition to the one traditionally upheld by the West.

There are, to be sure, differences as to Turkey and Russia's respective positions. Turkey is very much part of the Middle East and, since the AKP came to power in 2002, has embarked on a quest for regional leadership. Currently, it presides over a bloc comprising Qatar and the Government of National Unity (GNU) in Libya,

(1) In the 2000s, Russia restored ties with former allies such as Syria, Algeria and Libya but also established positive ties with all other regional powers, including Saudi Arabia, Iran, Israel and Egypt. See: Bechev, D., Secrieru, S. and Popescu, N. (eds.), *Russia Rising: Putin's foreign policy in the Middle East and North Africa*, I.B. Tauris, London, 2021.

(2) Trenin, D., 'What Drives Russia's Policy in the Middle East?', in *Russia Rising: Putin's foreign policy in the Middle East and North Africa*, op.cit.

competing with the other two, mutually opposed, alliances dominated by Iran and Saudi Arabia. Russia remains an external actor whose exposure and stakes in the region are lower. It enjoys positive ties with all three rival blocs and thus can navigate local rivalries and flash-points, from Syria to Libya to Yemen, with a certain flexibility.

More fundamentally, Russia is a *status quo* player while Turkey is a revisionist power in the Middle East. The Arab Spring saw the Turkish government take the side of popular uprisings against the incumbent authoritarian regimes ⁽³⁾. It banked on a transition to political systems dominated by parties sharing the Muslim Brotherhood's ideology, as is the case with the AKP. Turkey's partisan stance pits it against the likes of Iran, the United Arab Emirates (UAE), Egypt and Saudi Arabia across the region. Russia, by contrast, considers all those states partners and oftentimes joins forces with them against Turkey: e.g. with Iran in Syria and the UAE and Saudi Arabia in Libya.

Given those differences, Turkey performs a complex balancing act between Russia and the West. It looks at Western powers as a counterweight to Moscow. Erdoğan's current pitch to the Biden administration is that Turkey remains the sole NATO member willing and able to push back Russian expansionism in the Middle East and North Africa. However, Ankara conducts its outreach strategy on an *ad hoc* basis and this does not imply a tilt back to the West. At the end of the day, Turkey sees itself as an independent regional power with global aspirations, e.g. laying claim to leadership over (Sunni) Muslims around the world as opposed

to a Western bulwark. This in turn allows the Kremlin to forge common cause with Turkey in sharing the spoils in the region as the United States and Europe watch from the sidelines.

The cases of Syria and Libya vividly illustrate how the Russo-Turkish 'cooperative rivalry' plays out in concrete terms. In both cases,

Ankara and Moscow stand on opposite sides of the barricade in a complex contest involving a multiplicity of other actors, both local and external. Yet Russia and Turkey have engaged in give-and-take and demarcated spheres of influence to their mutual benefit. In addition, where their interests clash, they have – thus far – avoided a major escalation. The following two sections explore these two

aspects of their relationship: *cooperation* and *managed competition*.

RUSSIAN-TURKISH COOPERATION

Erdoğan's overarching policy goal in the early days of the Syrian war was regime change, very much contrary to Russia's wishes. Failing to convince Assad to embrace reform in 2011, Ankara threw its weight behind the opposition in every conceivable way – from hosting its political representatives, to becoming a conduit for arms and money pouring into the country, to directly backing the Free Syrian Army (FSA). But Turkish priorities shifted by early 2015 with the rise of the Syrian Kurdish Democratic Union Party (PYD) and its military wing, the People's

Russia and Turkey have engaged in give-and-take and demarcated spheres of influence to their mutual benefit.

(3) This support was never wholehearted and *realpolitik* considerations weighed on Ankara's actions. In Libya, for instance, it took a long time for Turkey to cut ties to the Gaddafi regime in 2011. Similarly, it did not support the Shia-led anti-government demonstrations in Bahrain.

Protection Forces (YPG) ⁽⁴⁾. The prospect of an autonomous Kurdish entity dominated by a PKK affiliate raised alarm in Ankara, particularly after the collapse of the peace negotiations with the militant organisation ('the Solution Process') in the summer of 2015. From that point onwards, the Turkish authorities focused on securing the 900-km long border with Syria and curbing the militants backed by the US ⁽⁵⁾.

Russia allowed Turkey to enter Syria and stop the YPG's expansion because this served its interests, too. In exchange for the permission to establish territorial buffers in the Aleppo Governorate and around Afrin, Ankara assisted Moscow and the Assad regime's reconquest of other parts of the country. That included the handover of Eastern Aleppo in December 2016 and the subsequent establishment of 'de-escalation zones'. A product of the Astana Forum, set up by Russia, Turkey and Iran, the zones in question allowed for the reincorporation (or 'reconciliation') of rebel-held enclaves throughout Syria through a series of local deals ⁽⁶⁾. *De facto* if not explicitly, Turkey accepted that Assad was there to stay and joined the Russian-led effort to find a political settlement beneficial to the regime. It furthermore became a go-between for rebel factions ranging from the FSA to the powerful Salafi militias such as Ahrar al-Sham. Turkey assisted Russia's bid to transform its wins on the battlefield into political gains. It became involved in the so-called Sochi Process geared towards redrafting the Syrian constitution and, from Moscow's perspective at least, legitimating Assad's continued reign under the guise of a political process aimed at ending the war.

A similar dynamic has been at play in the Kurdish-controlled area of northeast Syria. In October 2019, Operation Peace Spring saw Turkish troops and their Arab allies driving out YPG/SDF from parts of the region. This followed a pull-out of US marines which had been negotiated between Erdoğan and President Donald Trump. Abandoned by Washington, the Kurds turned to Russia whose forces deployed in the area. Putin and Erdoğan drew the boundaries of the Turkish-controlled 'safety zone', while Moscow emerged as the arbiter between the Assad regime, the Kurds and Ankara in this part of Syria. In the meantime, the US reduced its presence from 2 500 to just 500 troops, with Trump not being able to withdraw the entire force because of pushback in Congress. In a nutshell, Turkish actions – including the threat of using force unilaterally against the Kurds and putting American, French and British servicemen in harm's way – handed Russia a bloodless victory, allowing it to spread out to a part of Syria from which it hitherto had been excluded.

For the past year and a half, Turkey and Russia have tried to apply the military and tactical know-how gleaned in Syria to Libya. There Moscow has been backing the Libyan National Army (LNA) led by General Khalifa Haftar, an aspiring strongman based in the country's east. Supported by the UAE and Egypt too, Haftar has become increasingly dependent on the Russians over time. That is in response to the political and military aid Turkey has been providing to the internationally recognised Government of National Accord (GNA) as well as its successor the GNU formed in March 2021 ⁽⁷⁾. Much in

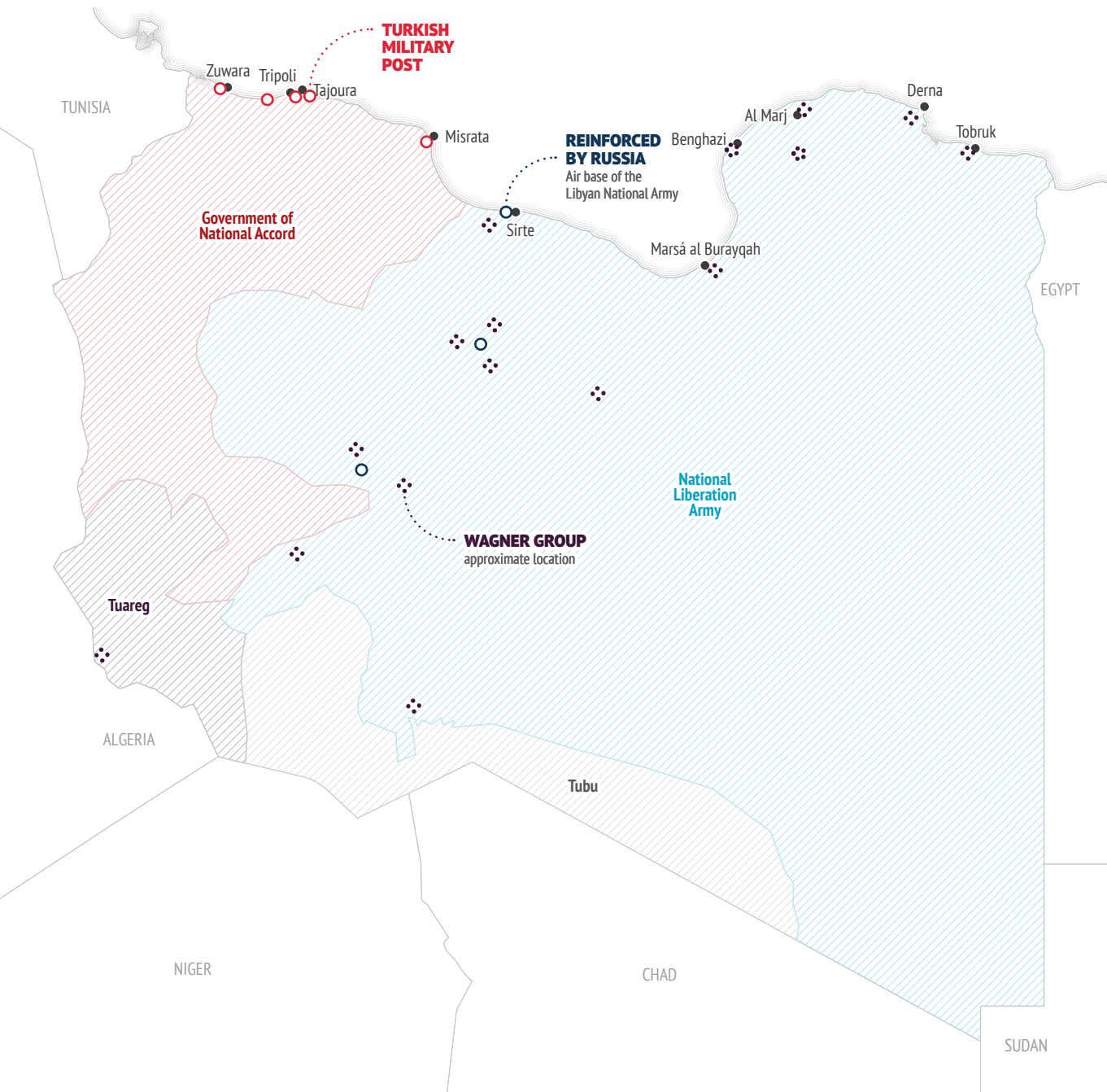
(4) Before 2012, PYD was one among several political parties in the Kurdish-inhabited parts of Syria. It grew to prominence after the Assad regime vacated large parts of the area and passed control to the faction. The PYD frames its ties to the PKK as being part of the same transnational movement represented by the Kurdistan Communities Union (KCK), of which both organisations are members. See: Kaya, Z. and Lowe, R., 'The Curious Question of the PYD-PKK Relationship', in Stansfield, G. and Shareef, M. (eds.), *The Kurdish Question Revisited*, Hurst, London, 2017, pp. 275–287.

(5) Cooperation between the US Central Command (CENTCOM) and YPG took off during the battle of Kobani (September 2014 – January 2015). In October 2015, CENTCOM oversaw the establishment of the so-called Syrian Democratic Forces (SDF) with YPG as its central component.

(6) Although multiple reports, including from human rights watchdogs, blamed the Russian airforce for indiscriminately targeting civilian infrastructure (including hospitals and schools), the transfer of control over the enclaves added to Russia's prestige as a political mediator. See: Syrian Network for Human Rights, 'Syrian-Russian Alliance Forces Commit Violations That Constitute War Crimes in and Around Idlib While the International Community Watches', 8 May 2019 (<https://sn4hr.org/blog/2019/05/08/53674>).

(7) The GNU resulted from talks facilitated by the United Nations Support Mission in Libya (UNSMIL) involving all main Libyan factions and is recognised by the House of Representatives based in the east of the country.

Russian and Turkish military presence in Libya



Data: Limes, 2021; European Commission, 2021

the same way that Russia saved Assad in 2015, Turkey proved instrumental in preventing Haftar from toppling the GNA in early 2020 and thereby gained the status of a key power broker. As the main backers of the two key players

in Libya – in a complex constellation of local actors – Erdoğan and Putin have the opportunity to engage in diplomatic horse-trading in the war-racked country. Beyond the geopolitical value of Libya thanks to its location

in immediate proximity to the EU, its vast oil reserves are an incentive for foreign powers, Turkey and Russia included. With the downfall of Gaddafi in 2011 Ankara lost up to \$20 billion in construction and energy contracts, losses it wishes to recoup. Russian oil and gas companies are active in both the east and the west, and are sure to profit if a durable settlement is reached.

However, Russian-Turkish cooperation in Libya has proven less effective than in Syria. In January 2020, Putin's and Erdoğan's joint call for a ceasefire failed to halt Haftar's bid to capture Tripoli. Talks in Moscow between the general and the head of the GNA, Faye al-Sarraj, in the presence of Russia and Turkey's foreign and defence ministers did not bear fruit either. The reason for that was Haftar's assessment at that juncture that he was on the cusp of winning. When the tide changed and GNA forces pushed the LNA away from Tripoli in May 2020, with the critical support of Turkey, Russia and Turkey engaged anew. On 22 July, they announced the launch of a working group, which Ankara touted as a step towards an Astana-like mechanism for Libya. But the group failed to score success. The Turkish demand that LNA forces and Russian private military contractors (PMCs) from the Wagner Group withdraw from the key city of Sirte, for instance, remains unresolved.

A workable Russian-Turkish partnership in Libya therefore remains elusive. Despite the progress of the UN-backed process leading up to the formation of the GNU, the fractiousness of Libyan politics, the competition over oil rents, and the involvement of a plethora of external parties perpetuates conflict. In addition, Turkey believes that it is gaining the upper hand. The GNU's authority is now formally accepted in Eastern Libya. For its part, Moscow is not prepared to make concessions – e.g., reduce its security footprint – to accommodate Ankara. As Russia and Turkey dig in, the Libyan civil war could be

reignited again with local actors shifting from political bargaining to fighting.

At closer inspection, the putative Russian-Turkish condominium in Syria appears just as problematic. Although the inner workings of the Syrian regime are as opaque as ever, Assad is not fully beholden to Moscow. Iran plays at least as critical a role as an external guarantor, given the longevity and depth of the Assads' links with the Islamic Republic. For all its influence over the security apparatus in Damascus, Russia has limited sway over decisions made in Tehran. Thus, Assad and the Iranians have some freedom of manoeuvre to undermine deals struck between the Russians and the Turks. The case of Idlib, explored below, illustrates the risks faced by both Ankara and Moscow.

MANAGING CONFLICT

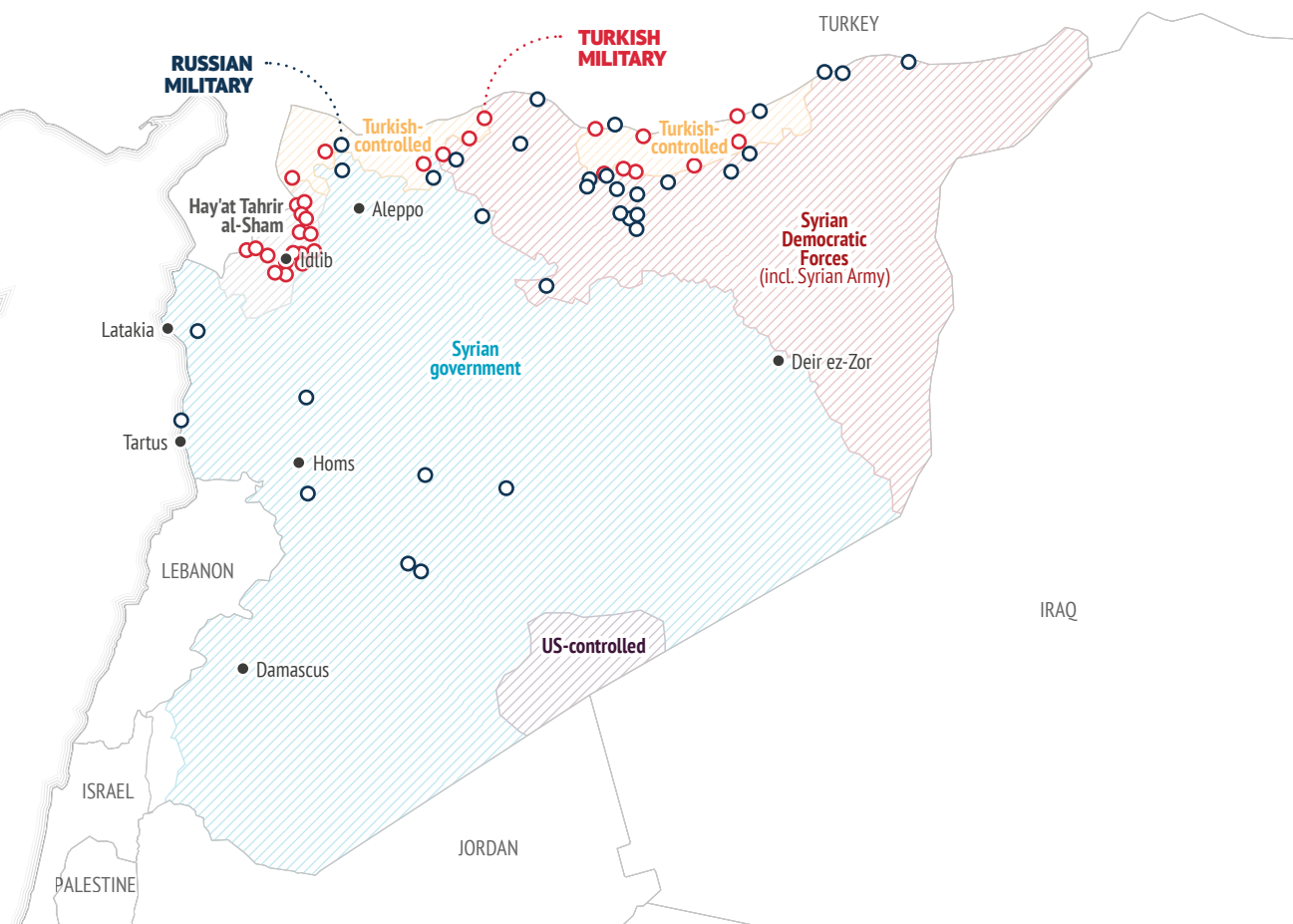
Shared interests aside, Russia and Turkey remain competitors in the Middle East and North Africa. Over the course of 2020, they collided in Idlib, northwestern Syria, and in the battle for Tripoli in Libya. Such proxy conflicts have come as a stark reminder of the limits of the Russian-Turkish partnership that has been

developing since 2016. Yet they have also testified to Putin's and Erdoğan's newly-developed ability to keep competition under control, reflecting the lessons learned during the so-called 'jet crisis' in Syria. The fact that neither Idlib nor Libya escalated into a full-blown showdown attests to the resilience of Russian-Turkish ties in a complex and challenging environment.

Idlib, the last remaining rebel-held enclave in Syria, has long been the toughest challenge for Russian-Turkish diplomacy. In September 2018, Putin and Erdoğan agreed to set up a demilitarised zone to be monitored by the Turkish

The fractiousness of Libyan politics, the competition over oil rents, and the involvement of a plethora of external parties perpetuates conflict.

Russian and Turkish military presence in Syria



Data: European Commission, 2021; Natural Earth, 2020

military. Turkey committed to disband and neutralise Hayat Tahrir al-Sham, heir to the radical al-Nusra Front and the strongest faction in the area. Russia for its part accepted to keep Idlib off-limits, despite Assad's (and Iran's) clear ambitions to recover control. A regime takeover spelled a nightmare scenario for Ankara, as more than 3 million locals – including 1.3 million internally displaced persons (IDPs) – could pour in across the border, adding to the 3.6 million Syrian refugees already on Turkish soil.

The agreement was put to the test when the Russian airforce joined in a regime push in late 2019 ⁽⁸⁾. In response Turkey ramped up its military deployment. On 28 February 2020, 34 of its servicemen were killed in an air attack, most likely carried out by the Russians. That marked the most serious incident involving the two militaries since the downing of the Russian jet in November 2015. Yet both Russia and Turkey took steps to de-escalate the tensions and arrive at some sort of a compromise. Erdoğan accused the regime of being responsible for the deadly air attack against troops whose presence on Syrian soil had been sanctioned by the

(8) Preceded by an earlier offensive in April–August 2019 which resulted in Assad taking parts of the Hama province along with southern Idlib.

Astana Forum. Likewise, the Russian military guaranteed the safety of Turkish observation points surrounded by the Syrian Arab Army. Deconfliction gave the Turks scope to target and inflict heavy damage on the regime, notably through unmanned aerial vehicles (UAVs) backed by the Turkish airforce operating from across the border and artillery⁽⁹⁾. On 5 March 2020, talks between Putin and Erdoğan yielded a ceasefire, including the re-opening of the M4 highway connecting Latakia and Aleppo under the supervision of joint patrols.

In Idlib, both Russia and Turkey applied force against the other's proxies to enforce red lines and gain leverage in bilateral negotiations. Moscow furthermore upped the ante and signalled that the Turkish armed forces were likewise a legitimate target. In other words, the two countries showed willingness to test each other on the battlefield. At the same time, Putin and Erdoğan made sure that lines of communication remained open and kept the situation under control. Eventually, they negotiated a new settlement and stabilised the frontline. However, hostilities could resume in the future⁽¹⁰⁾.

Russia and Turkey tested each other in Libya too, even if on paper neither military was on the frontlines. Russian reinforcements were crucial to Haftar's attempt to seize Tripoli in early 2020. The help from Moscow involved 1 500–3 000 experienced PMCs from the Wagner Group and Moran Security Group⁽¹¹⁾. They were operating with authorisation by the state

and in tandem with *Spetsnaz* commandoes from the Russian military intelligence (GRU)⁽¹²⁾. Russia delivered arms to the LNA in violation of the existing UN embargo⁽¹³⁾. Turkish military aid to the GNA was even more extensive: heavy equipment and UAVs⁽¹⁴⁾, instructors, mercenaries (including a reported 7 000 Syrian militiamen), and intelligence-gathering capabilities. Turkey deployed its navy off the coast of Libya. In short, Moscow and Ankara faced each other off on the battlefield. Turkey won because of Erdoğan's preparedness to take a bigger gamble than Russia, committing larger and more advanced assets (e.g. the UAVs) which wiped out Haftar's former advantage. The LNA was evicted from Western Libya in May 2020 and some of its allies flocked to the GNA⁽¹⁵⁾.

At the same time, Turkey treated Russia as a potential partner rather than an adversary. On 22 May 2020, for instance, drone strikes were halted to allow Wagner PMCs to withdraw from the frontlines in Tripoli⁽¹⁶⁾. Ankara drew a distinction between Russia, on one hand, and UAE and Egypt, on the other, the latter being more uncompromising in their support for Haftar. It reached out to Russia in the effort to recover Sirte, the gateway to Libya's oil fields, too.

However, Russia's choice was to balance against Turkey, not join it. Moscow doubled down on Haftar, making sure that he did not suffer a complete rout. In mid-June 2020, for instance, it deployed 14 MiG29s, piloted by mercenaries, to both Al-Jufrah and Al-Khadim

(9) Bakeer, A., 'The fight for Syria's skies: Turkey challenges Russia with new drone doctrine', Middle East Institute, 26 March 2020 (<https://www.mei.edu/publications/fight-syrias-skies-turkey-challenges-russia-new-drone-doctrine>); Roblin, S., 'Turkish Drones and Artillery Are Devastating Assad's Forces In Idlib Province-Here's Why', Forbes, 2 March 2020 (<https://www.forbes.com/sites/sebastienroblin/2020/03/02/idlib-onslaught-turkish-drones-artillery-and-f-16s-just-destroyed-over-100-armored-vehicles-in-syria-and-downed-two-jets/?sh=1797fb156cd3>).

(10) The Russians continue to carry out airstrikes against targets in the enclave.

(11) BBC News, 'Wagner, shadowy Russian military group, "fighting in Libya"', 7 May 2020 (<https://www.bbc.com/news/world-africa-52571777>).

(12) Harchaoui, J., 'The Pendulum: How Russia sways its way to more influence in Libya', War on the Rocks, 7 January 2021 (<https://warontherocks.com/2021/01/the-pendulum-how-russia-sways-its-way-to-more-influence-in-libya/>).

(13) Ramani, S., 'Russia's Mediation Goals in Libya', Carnegie Endowment for International Peace, 18 April 2019 (<https://carnegieendowment.org/sada/78940>). Russia vetoed UN Security Council draft resolutions against Haftar, printed Libyan currency on his behalf, and backed his claims that he was fighting radical Islam.

(14) The list includes Korkut anti-aircraft guns, self-propelled T-155 howitzers, cannons, ACV-15 combat vehicles and jeeps with anti-tank guns. Turkey started sending UAVs and armoured personnel carriers much earlier, in the spring of 2019.

(15) Lynch, I. A., 'Turkey is getting what it wants in Libya, but it will not end the war', Ahval, 11 June 2020 (<https://ahvalnews.com/libyan-conflict/turkey-getting-what-it-wants-libya-it-will-not-end-war>).

(16) 'The Pendulum: How Russia sways its way to more influence in Libya', op. cit.

airbases, key nodes in the defence line formed in central Libya. Moscow's actions encouraged others to strike at Turkey too. In early July 2020, the al-Watiya airbase, the Turkish operational hub in the West, came under attack, most likely by UAE warplanes and UAVs. Egypt has been threatening an all-out intervention as well to prevent the fall of Sirte and Jufrah too. In other words, Russia and a coalition of like-minded countries is dedicated to denying Turkey mastery over Libya. On the positive side, the strategic stalemate led to a ceasefire on 21 August 2020 signed by Prime Minister Al-Saraj (GNA) and Aguila Saleh, the speaker of the House of Representatives, and, in due course, the GNU.

Although both Syria and Libya have stayed relatively quiet since the spring/summer of 2020, they are far from stable. Violence could erupt anew and draw in Russia and Turkey. Should that happen, Erdoğan and Putin will likely revert to managed confrontation.

IMPLICATIONS FOR THE EU

Russia and Turkey are now firmly ensconced in the EU's southern neighbourhood, which has become the arena of geopolitical rivalry involving an array of regional and external powers. Europe has no choice but to engage with Ankara and Moscow on issues of common interest, whether it is the peace process in Libya, the humanitarian situation in Syria or the Iranian nuclear dossier. Still, the ability of Russia and Turkey to negotiate and coordinate

their actions quickly behind the scenes does not make the task easy for the EU.

Libya looks like the most promising case in light of the headway made by the peace process and the formation of the GNU. There, Europe's interests are more closely aligned with those of Turkey than with those of Russia which profits from the civil war. Even if Haftar and the LNA have their backers in European capitals⁽¹⁷⁾, who (used to) see the renegade general as a bulwark against Islamic radicalism, an inclusive administration in Tripoli accommodating factions in eastern Libya offers a path to stability. A return to fighting, with Turkey, Russia, the UAE and others fanning conflict, would have negative spillover effects on the EU: from another cut-off of oil production to an uptick in asylum seekers crossing into Italy. Libya is linked with the dispute in the Eastern Mediter-

anean by virtue of the MoU on the delimitation of the Exclusive Economic Zones (EEZs) that the GNA signed in November 2019 as the price for Turkey's military assistance. The deal, which is opposed by Cyprus, Greece, France and Italy, remains unratified, however. Cooperation between the EU and Turkey in Libya could be sustained if this continues to be the case, given the significance of exploratory talks currently underway between Ankara and Athens with regard to the Eastern Mediterranean⁽¹⁸⁾.

The scope for cooperation with Turkey and/or Russia on Syria is much narrower. In principle, Germany and France support the idea of four-way talks on the humanitarian situation in the country. Chancellor Angela Merkel and President Emmanuel Macron held a summit with Putin and Erdoğan in Istanbul in October 2018. During the Idlib crisis in February 2020 they lobbied the Russian president to intervene

(17) Turkey alleges that France has thrown its weight behind Haftar. In reality, Paris enjoys good ties with key ministers within the GNA/GNU.

(18) Greece and Turkey agreed to resume exploratory talks on their maritime disputes in September 2020, following a five-year break. See: Reuters, 'Turkey, Greece agree to resume talks after four years', 22 September 2020 (<https://www.reuters.com/article/turkey-greece-eu-int-idUSKCN26D1U4>).

and stem the violence. The EU, Russia and Turkey can and should cooperate in post-conflict reconstruction too. However, this looks like a bridge too far as a workable power-sharing formula enjoying broad international support is not in sight, while despite the territorial gains made by the regime Syria remains fragmented. Turkey is currently negotiating a renewal of the refugee deal and no doubt would like part of the EU's assistance channeled to the enclaves in northern Syria that it controls. Europe will have to be steadfast in refusing to accommodate Ankara on this point as it has no interest in legitimising a long-term Turkish presence there.

It is in Europe's interest to avoid a scenario where it is drawn into the crucible of Russo-Turkish cooperative rivalry in the Middle East and North Africa. Both states may wish to enlist support by the EU in order to gain advantage over the other. Yet this is a slippery slope which furthermore generates risks of discord within the EU. Rather than picking sides, the EU will have to persist in supporting multilateralism where all stakeholders are represented at the table. The UN-supported Libyan peace process offers a better model going forward than the strongman diplomacy personified by Putin and Erdoğan.

CHAPTER 5

RUSSIA AND TURKEY IN THE BALKANS

Parallel tracks

by
DIMITAR BECHEV

In the Balkans, many see Russia and Turkey as identical twins. Headed by authoritarian leaders at odds with the West, the two are exploiting historic, cultural and religious ties with local societies to challenge the EU and NATO-centric order that has defined Balkan politics since the 1990s. Experts warn about the allure of a strongman model in a region where illiberalism and virulent nationalism have deep roots ⁽¹⁾. Along with China, Russia and Turkey appear as the prime candidates to fill the gap resulting from the West's retrenchment and the slow-down in EU enlargement ⁽²⁾. At the same time, Russia and Turkey's positions and strategies differ. While Moscow's main objective is to prevent the expansion of NATO and the EU, Ankara remains committed to the Balkans' integration into the Atlantic Alliance (of which it is a member) and is overall indifferent to EU enlargement. Turkey's ongoing bid to upgrade its Customs Union with the EU is in line with Brussels' policy of fostering economic integration. In consequence, there is no immediate threat

of a Russo-Turkish common front in the region directed against the West.

This chapter looks at the question of how Russia and Turkey interact in the Balkans, with a focus on the EU candidate countries in the former Yugoslavia, Albania but also their immediate neighbours. It starts off by listing the issues on which Moscow and Ankara converge. Then, the chapter proceeds to explore areas of divergence. Lastly, it examines the implications for the EU in this key region which is at the forefront of enlargement and the common security and defence policy.

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- (1) Kapidžić, D., 'The rise of illiberal politics in Southeast Europe', *Southeast European and Black Sea Studies*, Vol. 20, No. 1, pp. 1-17 (<https://www.tandfonline.com/doi/full/10.1080/14683857.2020.1709701>).
 - (2) Bieber, F. and Tzifakis, N., 'The Western Balkans as a Geopolitical Chessboard? Myths, Realities and Policy Options', The Balkans in Europe Policy Advisory Group (BiEPAG), June 2019 (https://biepag.eu/wp-content/uploads/2019/06/The_Western_Balkans_as_a_Geopolitical_Chessboard.pdf).

AREAS OF CONVERGENCE

The authoritarian alternative

Russia and Turkey pose a challenge to the West in the Balkans because of both what they do and what they are. They have come to represent an authoritarian alternative to the liberal democratic paradigm promoted by Western institutions since the end of the Yugoslav wars in the 1990s. Vladimir Putin's Russia has been ranked as an autocracy since 2004. International watchdogs such as Freedom House downgraded Turkey to 'not free' in 2018 after amendments to the constitution gave the president sweeping new powers. As we have already seen, both Russian and Turkish politics are characterised by the absence of institutional checks and balances: power is concentrated in the hands of a leader and often exercised through informal means, the media and civil society are muted, while the judiciary is subservient to the executive branch. Both countries have experienced periods of robust economic growth, particularly in the 2000s but in the Turkish case all the way up to the mid-2010s. In contrast to much of the Balkans, Russia and Turkey have improved public infrastructure, seen an expansion of the middle class, and promoted their 'country brand' abroad ⁽³⁾. Added to Putin's and Erdoğan's personal appeal, such achievements give credence to a narrative that neither EU

The Balkans are a fertile ground for external authoritarian powers to exert influence.

membership nor democracy is essential for a country or society to thrive. Moreover, authoritarian modernisation pushed by enlightened autocrats may appear as a better alternative. This message strikes a chord in the Western Balkans where countries feel they are stuck in the waiting room of EU accession ⁽⁴⁾.

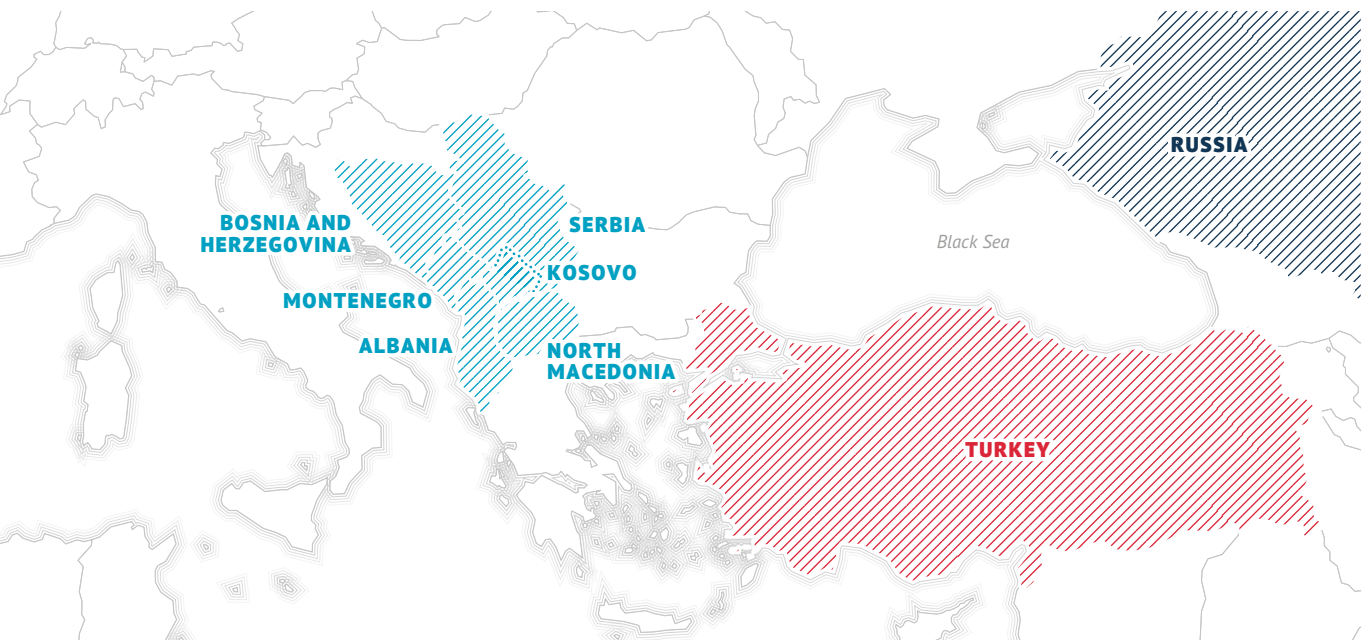
The Balkans are receptive to authoritarian appeal also thanks to local conditions. The authoritarian model of governance is well-entrenched in the region, where even during the peak era of liberalism and Western dominance in the 2000s democratisation made only modest gains. In the 2010s, as external anchors weakened, democratic backsliding became pervasive. Authoritarian leaders have tightened their grip on public institutions and resources, cultivated clientelistic networks, captured the media, harnessed nationalism, and leveraged the power of the state to marginalise the opposition and critics in civil society ⁽⁵⁾. The cases of Prime Minister Nikola Gruevski, in power in (North)

Macedonia between 2006 and 2016, the Serbian President Aleksandar Vučić, or Milorad Dodik in Republika Srpska are all textbook examples ⁽⁶⁾. However, they are not unique. Other leaders and countries of the region exhibit similar features. Indeed, where democracy survives it tends to be fragile and compromised by a rule-of-law and accountability deficit ⁽⁷⁾. Ethnically

divided societies are particularly vulnerable in this respect, in that identity cleavages perpetuated by power-sharing arrangements prevent the emergence of a robust civic culture. In other words, the Balkans are a fertile ground for external authoritarian powers to exert influence.

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- (3) For instance, Russia's hosting of the Football World Cup in 2018 or Turkish TV soap operas which enjoy tremendous popularity in the Balkans, as much as they do in the Middle East or Africa.
 - (4) Of course, social and economic realities in both Russia and Turkey do not correspond to the idealised image projected abroad, including in the Balkans, but that is by and large not reflected in the local media.
 - (5) Bieber, F., *The Rise of Authoritarianism in the Western Balkans*, Palgrave MacMillan, London, 2020.
 - (6) In 2019, Freedom House demoted Serbia from 'free' to 'partly free' (https://freedomhouse.org/sites/default/files/Feb2019_FH_FITW_2019_Report_ForWeb-compressed.pdf).
 - (7) Maliqi, A., 'Transition to what? Western Balkans democracies in a state of illiberal equilibrium', Sbunker, November 2020 (<https://sbunker.net/botime/90726/transition-to-what-western-balkans-democracies-in-a-state-of-illiberal-equilibrium/>).

Russia, Turkey and the Western Balkans



Data: European Commission, 2021

The model(s) embraced by Russia and Turkey find strong local resonance.

The strongman cult

Authoritarian reflexes explain the large following enjoyed by both Putin and Erdoğan in the Balkans. Sociological surveys point to the two leaders' immense popularity among their target audiences ⁽⁸⁾. For instance, Putin scores high with Serbs – in Serbia as well as in Bosnia and Herzegovina, Montenegro and Kosovo. Erdoğan, for his part, enjoys popularity among Bosniaks and to a lesser degree Albanians. They largely outperform other international figures – e.g., senior European politicians or the Gulf leaders vying with Turkey for the leadership of Muslim communities in the region.

This is visible anecdotally too. The Russian president's visits to Serbia, for instance, draw large crowds, only in part bussed in by the authorities. In January 2019, Putin enjoyed a lavish welcome in Belgrade where he oversaw the re-opening of the Saint Sava cathedral, renovated thanks to a Russian grant, along with the signature of 21 economic and political agreements with President Vučić. In much the same way, Erdoğan chose Sarajevo for a massive rally in May 2018 in the run-up to the presidential and parliamentary elections in Turkey. Thousands of Turks from across Western Europe, including Germany and the Netherlands which had banned Erdoğan and other Turkish top officials from campaigning on their territory, descended on the Bosnian-Herzegovinian capital. At the Zetra Olympic Hall which was packed with his supporters, Erdoğan accused 'certain European countries' of sowing division among Turks and other Muslims ⁽⁹⁾. The rally gave an

(8) 83% of the population in Serbia hold a favourable view of Putin according to a Gallup opinion poll: Gallup, 'Global Leaders 2018', October–December 2018 (https://www.gallup-international.com/fileadmin/user_upload/surveys/2018/2018_End-of-Year_Global-Leaders.pdf).

(9) BiEPAG, 'Erdoğan in Sarajevo: It's my Party and I'll campaign in Europe if I want to', 1 June 2018 (<https://biepag.eu/erdogan-in-sarajevo-its-my-party-and-ill-campaign-in-europe-if-i-want-to/>).

opportunity to the Turkish president to portray himself as the voice of Islam in the Balkans but also in Europe as a whole.

The cult of foreign strongmen, seen as external protectors of embattled ethnic communities against their rivals, bestows legitimacy on authoritarian leadership at home. Here, the case of President Aleksandar Vučić, who has built close ties to both Putin and Erdoğan, is illuminating. Association with the Russian and the Turkish leaders, as well as with China's Xi Jinping, is central to Vučić's 'make Serbia great again' messaging which, amplified by the pro-government media, plays well with the grassroots. The Serbian government's success in rolling out Covid-19 jabs, obtained from China and Russia, and its 'vaccine diplomacy' in the Western Balkans demonstrates the link between foreign policy and constituency-building ⁽¹⁰⁾.

Identity politics

Both Russia and Turkey have been appealing to religious and ethnic particularism and, in the Russian case, anti-Western nationalism. Their agenda of promoting identity politics stands in stark contrast with the universalism espoused by the EU and the US. Since the humanitarian interventions in the 1990s, Western policy has been premised on norms and principles such as democracy, the respect for individual and minority rights, and the rule of law, which transcend ethnic and confessional divides. EU enlargement enjoys support across community lines, although Serbs tend to be more sceptical than their neighbours ⁽¹¹⁾. European integration, in other words, seeks to foster inclusive, civic-based community building and thus

repair the historical rifts which, in contrast, the Russian and Turkish narratives seek to exploit.

Russia has built alliances with parties and civic associations of a nationalist bent, opposed to NATO and sceptical of the EU. In doing so, it has been keen to play the cultural/religious card. The Russian Orthodox Church benefits from robust ties with local faith communities, e.g., the Serbian Orthodox Church. It weighed on the latter's side in the dispute with break-away national churches in North Macedonia and Montenegro, incidentally two of the more Western-leaning countries in the region. There are also religious-cum-political entrepreneurs such as the so-called 'Orthodox oligarch' Konstantin Malofeev who has nurtured ties with anti-Western politicians and groups across the Balkans ⁽¹²⁾. His close relationship with Milorad Dodik is only one such example ⁽¹³⁾. All in all, Russia is reinforcing the notion that Orthodox South Slavs should seek its protection and steer clear of Western clubs. While Russian policy in the Balkans is shaped by multiple drivers and cannot be reduced to notions of civilisational belonging, the latter figure strongly in its narrative projection, not unlike in the post-Soviet space. Indeed, the ecclesiastical disputes involving the Serbian Orthodox Church mirror the rivalry between the Russian Orthodox Church and the Kyiv Patriarchate concerning ecclesiastical jurisdiction over Ukraine. As in the Balkans, belonging to either of the two churches tends to correlate with orientation towards the West or towards Russia ⁽¹⁴⁾.

Turkey is in some respects Russia's mirror image. Since the days when Ahmet Davutoğlu was in charge of the ministry of foreign affairs (2009-14), it has stressed that the Balkans

(10) Conley, H.A. and Saric, D., 'Serbia's Vaccine Influence in the Balkans', Center for Strategic & International Studies (CSIS), 24 March 2021 (<https://www.csis.org/analysis/serbias-vaccine-influence-balkans>).

(11) International Republican Institute (IRI), 'Western Balkans Poll Shows Strong Support for EU', 2 June 2020 (<https://www.iri.org/resource/western-balkans-poll-shows-strong-support-eu>).

(12) Stronski, P. and Himes, A., 'Russia's Game in the Balkans', Working Paper, Carnegie Endowment for International Peace, January 2019 (<https://euagenda.eu/upload/publications/untitled-203333-ea.pdf>); Bechev, D., *Rival Power: Russia in Southeast Europe*, Yale University Press, New Haven, 2017.

(13) Grozev, C., 'The Kremlin's Balkan Gambit', *Bellingcat*, March 2017 (<https://www.bellingcat.com/news/uk-and-europe/2017/03/04/kremlins-balkan-gambit-part/>).

(14) Milosevich, M., 'Russia's Weaponization of Tradition: The Case of the Orthodox Church in Montenegro', CSIS, 25 September 2020 (<https://www.csis.org/blogs/post-soviet-post-russias-weaponization-tradition-case-orthodox-church-montenegro>).

region belongs to its sphere of influence based on shared historical legacy and cultural bonds⁽¹⁵⁾. It claims to be the champion and protector of Balkan Muslims. Imperial legacy is now central to Ankara's policy in the Balkans, overshadowing the country's bond to the West, e.g., its long-standing membership of NATO and association with the EU. The Directorate of Religious Affairs (*Diyanet İşleri Başkanlığı*, the Diyanet) maintains a vast network across the Balkans, training and funding imams, mosques, and other pious institutions. The Turkish Cooperation and Coordination Agency (TİKA) funds the restoration of Ottoman-era mosques and other historical sites, as well as the construction of new places of worship⁽¹⁶⁾. The Maarif Foundation and the Yunus Emre Institutes run educational institutions, in many instances taking over the assets of the Gülen movement. The governing AKP supports domestic political players either aligned with its ideology or sympathetic to Turkey⁽¹⁷⁾.

At the practical level, Turkey and Russia converge through playing the part of external protectors of kin communities within fragmented countries. Bosnia and Herzegovina illustrates how this works. There Russia and Turkey are members of the Peace Implementation Council (PIC) overseeing the Office of the High Representative (OHR) on behalf of the UN. Within the PIC, Moscow has positioned itself as the advocate of Republika Srpska, the Serbian-majority entity within Bosnia. Ankara claims the role of a big brother to Bosniaks, on

account of its historical ties with the community which also has a numerous diaspora in Turkey itself⁽¹⁸⁾.

OCCASIONAL POLICY COORDINATION

In addition to convergence by default rather than by design, there are instances where Russia and Turkey coordinate their policies in the region, although this happens more rarely than in the Middle East and North Africa, South Caucasus or Black Sea. And usually when they do act in unison, it undercuts Europe's interests.

The TurkStream gas pipeline is probably the best example. It was launched in January 2020 by Putin and Erdoğan at a ceremony in Istanbul and is designed to supply 31.5

bcm a year, of which half goes to Turkey and half to the Balkans and Hungary. The extension through Bulgaria and Serbia became operational at the beginning of 2021. TurkStream has resulted from the Kremlin's decision to drop the project to build South Stream in December 2014, in the wake of a long-winded legal dispute with the European Commission over the application of EU rules on third-party

access. It consolidates Russia's grip on the natural gas markets in the region and establishes

Turkey and Russia converge through playing the part of external protectors of kin communities within fragmented countries.

(15) See Ahmet Davutoglu's address at the conference 'Ottoman Legacy and Balkan Muslim Communities Today' (Sarajevo, 16–18 October 2009). Full text available in Eren, H. (ed.), *The Ottoman Legacy and the Balkan Muslim Communities Today. Conference Proceedings*, Balkanlar Medeniyet Merkezi, Istanbul, 2011. See also: Öztürk, A. E., *Religion, Identity and Power: Turkey and the Balkans in the Twenty-First Century*, Edinburgh University Press, Edinburgh, 2021.

(16) The involvement of TİKA and the Diyanet dates back to the 1990s. Back then, one of Ankara's main concerns was counteracting Salafism coming from the Gulf.

(17) *Religion, Identity and Power: Turkey and the Balkans in the twenty-first century*, op.cit.

(18) 'Why are Russia and Turkey so interested in Bosnia?', *The Times*, 18 September 2018 (<https://www.thetimes.co.uk/article/in-depth-why-are-russia-and-turkey-so-interested-in-bosnia-tkzlvtkwf>); see also Huskic, A., 'Bosnia and Herzegovina: Abandoned by the West, embraced by the East?', in Tzifakis, N. and Bieber, F. (eds.), *The Western Balkans in the World: Linkages and relations with non-Western countries*, Routledge, 2019.

an alternative route to Central Europe bypassing Ukraine⁽¹⁹⁾.

No wonder that the US government has threatened companies involved in the extension (TurkStream 2) with sanctions⁽²⁰⁾. The European Commission for its part has warned Serbia that allowing a segment of the pipeline to be built on its territory was at odds with commitments under the Energy Community, again due to Gazprom being both the majority owner and the main beneficiary⁽²¹⁾ of the new infrastructure as was the case in South Stream. The bottom line is that with TurkStream, Turkey and Russia have jointly sought to undermine the Western strategy aimed at promoting diversification of supplies in the Balkans and to the EU.

TURKEY, RUSSIA AND THE WEST

Despite convergence as well as occasional policy coordination, most of the time Turkey and Russia do not act in concert in the Balkans. While Moscow seeks to roll back Western influence, Ankara is ambivalent and on occasion aligns its foreign policy with that of the EU and the United States. The following section highlights the differences in the two countries' respective approach to the region.

Since the 1990s, the Balkans have been part and parcel of Russia's effort to gain recognition as a leading actor in European security alongside France, Germany and the United Kingdom, as well as the United States. Economic interests and historical ties with the South Slavs or other

Orthodox nations are therefore secondary to geopolitics. The Kremlin sees the Balkans as a vulnerable European periphery where Russia could build influence to leverage against the West. The dispute over Kosovo's independence, the internal divisions in Bosnia and Herzegovina, and polarised politics in Montenegro and North Macedonia have all provided opportunities for Russia to assert itself as a geopolitical competitor of both the EU and the United States. Rather than draw the Balkans into its own orbit, a costly endeavour, it seeks to make life difficult for the West⁽²²⁾.

Diplomatic alliances are Russia's main instrument. Since 2008, Belgrade has enlisted support from Moscow to even the balance of power with Pristina, which is traditionally backed by the West. Russian help in opposing Kosovo's independence, inclusion in international organisations and recognition by third countries across the globe accounts for Serbia's refusal to join Western sanctions. Moscow and Belgrade have developed close security ties – joint drills, purchases and donations of military equipment, possibly intelligence sharing etc. – thanks to a defence agreement signed in 2013. Russia has also supported Republika Srpska drifting apart from Bosnia and Herzegovina, shielding Serb leader Milorad Dodik in the PIC. In return, Dodik has obstructed Bosnia's cooperation with NATO and vetoed alignment with the Western sanctions against Russia.

Russia's presence in the information space is central to its influence. Tabloids, online portals and TV channels across southeast Europe feed the cult of Putin, praise Russia's role in world affairs and condemn the West. On the one hand, there are outlets funded and controlled by the Russian state, which deliver its point of view on

(19) Bechev, D., 'TurkStream: Geopolitical Impact and Future Prospects', Al Sharq, 28 May 2020 (<https://research.sharqforum.org/2020/05/28/turkstream-geopolitical-impact-and-future-prospects/>).

(20) Gotev, G., 'Additional line to Turkish Stream would face US sanctions', EURACTIV, 10 December 2019 (<https://www.euractiv.com/section/energy/news/additional-line-to-turkish-stream-would-face-us-sanctions/>).

(21) Gazprom is Srbijagas's near exclusive supplier and, together with TurkStream, will acquire a 51% majority stake in a critical piece of Serbia's infrastructure. See: Competition Policy International (CPI), 'EU: Commission says Serbia's TurkStream branch to impede competition', 7 March 2019 (<https://www.competitionpolicyinternational.com/eu-commission-says-serbias-turkstream-branch-to-impede-competition/>).

(22) Secieru, S., 'Russia in the Western Balkans: Tactical wins, strategic setbacks', Brief No. 8, EUISS, 2 July 2019 (<https://www.iss.europa.eu/content/russia-western-balkans>).

international affairs and prominent regional issues such as the Kosovo dispute to Balkan audiences. In 2015, the Sputnik agency opened a Serbian language news service that operates through both a website and a radio station. On the other hand, there are local media – often under direct or indirect control of the elites – that propagate (pro-)Kremlin narratives ⁽²³⁾. Turkey's media ecosystem is less developed by comparison. The public broadcaster TRT maintains web-based portals in local languages which promote a positive image of Turkey and Erdoğan. However, it has limited outreach and cannot compete with regional networks like the Sarajevo-based Al Jazeera or N1, a Balkan associate of CNN, let alone with each country's national media ⁽²⁴⁾.

In Moscow's view, meddling in the Balkans is tantamount to giving the West a taste of its own medicine. If the Europeans and the Americans are trespassing in Russia's backyard – Moldova, Ukraine, Georgia, or any other part of its 'near abroad' – Russia is entitled to throw its weight around in theirs ⁽²⁵⁾. This highlights another key point. Southeast Europe lies well beyond what Moscow considers its privileged sphere of interest. There have been no Russian troops deployed in the area since Putin himself ordered a withdrawal from Bosnia and Herzegovina and Kosovo back in 2003. In terms of trade, investment and financial aid, Russia lags far behind the EU too ⁽²⁶⁾.

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Unlike Russia, Turkey is not an external player in the region. Indeed, thanks to its history and geographic location, Turkey is an integral part of the Balkans. It is also connected to its neighbours to the west through numerous diasporas as well as the continued presence of Turks and Muslims across southeast Europe. Since its establishment in the 1920s, the Republic of Turkey has always participated in and contributed to regional initiatives bringing together the Balkan states.

Turkey acts in parallel with but not always against the EU and the United States. Its goal is to expand its presence without necessarily supplanting the West. If Russia is content with a degree of controlled instability in the region,

Turkey more often than not expresses a preference for the stabilisation of the Balkans via NATO and the EU.

Economically, Turkey remains tied to the EU. The Customs Union anchors the country within the EU's marketplace, just like the Balkans. EU enlargement to new members expands Turkey's access to their economies ⁽²⁷⁾.

Notably, Turkey is among the top 5 export markets for the Western Balkans' immediate neighbours Romania, Bulgaria and Greece, all of them members of the EU. Despite Turk-Stream 2, Ankara has made a contribution to the region's energy security too. The so-called Southern Gas Corridor which became a reality with the inauguration of the Trans Adriatic Pipeline (TAP) in November 2020, connects the EU and the Balkans to the hydrocarbon-rich

(23) Metodieva, A., 'Russian Narrative Proxies in the Western Balkans', GMF Policy Paper, 5 June 2019 (<https://www.gmfus.org/publications/russian-narrative-proxies-western-balkans>).

(24) See chapters by Adnan Huskic, Zoran Nechev and Ivan Nikolovski, Gëzim Visoka and Enika Abazi in Tzifakis, N. and Bieber, F. (eds.), *The Western Balkans in the World*, op.cit.

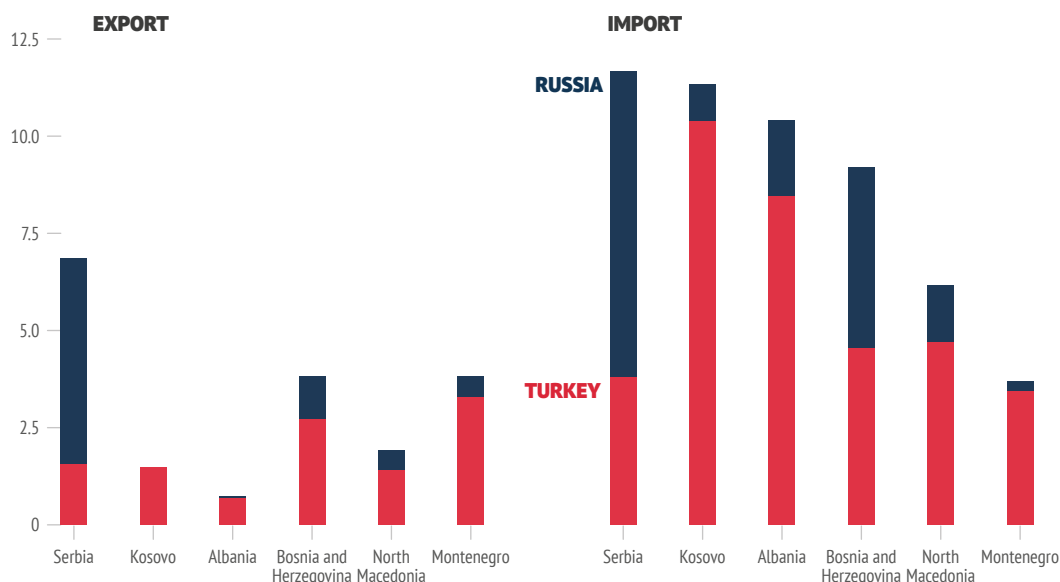
(25) Samorukov, M., 'Russia's Tactics in the Western Balkans', Carnegie Europe, 3 November 2017 (<https://carnegieeurope.eu/strategieurope/74612>).

(26) While the Russian Federation supplies gas and crude oil to the region, it is not a significant export market or source of foreign direct investment (FDI) or other forms of financial transfers. For instance, Russia accounted for 4.9 % of FDI in Serbia in 2014, 4.6 % in 2015, and 3.9 % in 2016. The EU's share is between 70 and 80 %.

(27) The Free Trade Agreements (FTAs) Turkey concluded with countries in southeast Europe in the 1990s and 2000s followed the signing of similar deals with the EU. Because of the Customs Union, Ankara is bound by the FTAs negotiated by Brussels and therefore has to negotiate follow-up agreements in order to secure reciprocal access to the markets of countries with which the EU has preferential trade arrangements.

Western Balkans trade in goods with Russia and Turkey

Share of total trade, %, 2019



Data: World Bank, 2021; kosovodata.com, 2020

Caspian Basin and puts Gazprom's near monopoly under pressure.

On the security side, Turkey supports NATO's enlargement to the Balkans. Irrespective of frictions with Washington and major European countries, it does not try to wean countries away from Western organisations as Russia does. Turkey ratified Montenegro's and North Macedonia's accession to the Alliance without delay. There is also no opposition, rhetorical or substantive, from Ankara *vis-à-vis* EU expansion, which benefits Turkey. Turkish soldiers serve in the EU peacekeeping mission in Bosnia (EUFOR). Turkey does not offer to the region any alternative to integration into Euro-Atlantic institutions. Accordingly, Erdoğan's friends in the region – e.g. Prime Minister Edi Rama of Albania or Bakir Izetbegović, the leader of the Bosniak Party of Democratic Action (SDA) – are staunchly in favour of joining the EU and, in the Bosnian case, NATO. At the same time, the Western Balkans' slow-moving integration

in the EU presents a favourable scenario for Turkey. The interregnum allows it to exercise leverage more fully over local power-holders interested in diversifying foreign relations and currying favour with Ankara⁽²⁸⁾. In the long run, these enduring friendships and ties may pay off for Turkey too, when the Western Balkans join the EU.

TAKEAWAYS FOR THE EU

Unlike in the Middle East and North Africa or the South Caucasus, Russia and Turkey engage neither in bitter competition nor in intensive cooperation in the Western Balkans. They often chart parallel courses. Yet, in the hard security domain, Turkey's policies and interests often

(28) Bechev, D., 'Turkey's Policy in the Balkans. Continuity and Change in the Erdoğan Era', *Südosteuropa Mitteilungen*, Vol. 59, No. 5–6, 2019 (<https://www.ceeol.com/search/article-detail?id=833231>).

align with those of Europe. This is unlikely to change in the near future.

For the EU, the Balkans differ in important ways from the Middle East and North Africa and the Southern Caucasus. It is not a neighbouring region but very much an integral part of the EU, with several countries already members of the Union and the rest aspiring to join. Russia's and Turkey's influence is at odds with Europe's objective of transforming states and societies in its own image. Although the EU remains the predominant political player in the area, not to mention the considerable economic weight it represents, its aspirations have had to reckon with hard local realities. Foreign meddling is part of the problem but at the end of the day Russia and Turkey (as well as China) are able to project influence thanks to regional actors aligning with them in order to accrue economic and/or geopolitical profits.

In order to assert its leadership, the EU needs to address more effectively the underlying conditions which enable external involvement. The latter include chronic ills like state capture, authoritarian resilience and economic stagnation. In fairness, the roots of those structural phenomena go deep and the EU cannot make a positive difference single-handedly. The challenge is to identify domestic allies, whether in civil society or in the political sphere, and empower their efforts to demand more transparent and accountable government. This transformational endeavour will certainly benefit from tighter and better-coordinated transatlantic action. The advent of the Biden administration provides an opportunity to re-establish the lines of communication and find synergy between the EU and the US in the Balkans. Only by increasing bottom-up pressure for reforms and working in partnership with like-minded powers will the EU be in a position to curb malign foreign influence and fully integrate the region in institutional Europe.

CONCLUSIONS

by

**STANISLAV SECRIERU, SINIKUKKA SAARI
AND DIMITAR BECHEV**

Erdoğan assured Putin that the pilot who shot down the Russian jet had been arrested; in response Putin pledged to give a prison term to the bulldozer driver who steamrolled Turkish tomatoes ⁽¹⁾.

Popular Russian jokes distil the very essence of the subject they tackle. The one above is no exception. It vividly encapsulates Russian-Turkish dealings: transactionalism, leader-centricism, the disparities between the two countries' economies and, not least, the asymmetry of power.

This *Chaillot Paper* has explored the dynamics at play between Turkey and Russia across a variety of issues and fields. It has charted the evolution of the relationship over the past decades, and analysed the question of why relations between the two countries have flourished despite diverging and competing interests – as well as mapping the likely future trajectories of the relationship.

As described in detail in the previous chapters, many common features and characteristics have led Russia and Turkey to engage in closer cooperation. For example, the personalistic authoritarian systems that both countries share generate trust between the leaders, and encourage them to build a common front against liberal criticism of their policies at home and abroad. This is what has forged the goodwill between Presidents Erdoğan and Putin.

There has been growing convergence between Turkish and Russian foreign policy over time, too, with Turkey becoming critical of its Western allies and adopting an increasingly assertive posture. Russia and Turkey perceive themselves as rising powers entitled to a larger place in the sun. Estrangement from the West has drawn the two countries into a closer embrace.

At the same time, these great power ambitions and predilection to use military force as a tool of coercive diplomacy have fuelled competition, bringing Moscow and Ankara close to direct conflict on several occasions. But instead of driving them apart, such tensions have forced them to recognise how indispensable each is to the other in the Middle East and in the post-Soviet region. This recognition of their mutual regional interdependence has sealed the often uneasy but productive cooperation between the two.

The Russo-Turkish *rapprochement* has also been underpinned by economic complementarity. Russia satisfies Turkey's demand for energy, while Turkey in return caters to Russia's demand for construction services, food supplies, industrial goods and tourism. Thus, benefits are not concentrated at the top level, but trickle down to all segments of both societies. This in turn has substantially thickened and solidified relations.

(1) 'Jokes about Politics', Scanvord.net (<https://www.scanvord.net/anekdoty/anekdot.php?raz=14&an=23>).

POTENTIAL DISRUPTORS

The Russian-Turkish partnership has demonstrated impressive resilience in the face of numerous disagreements, tensions and crises. It is probable that both sides will continue to perform, as has been the case until now, a delicate balancing act by avoiding major head-on confrontations and working, albeit sometimes reluctantly, together in their overlapping neighbourhoods. Still, while assuming continuity, it cannot be ruled out that spoiling factors may increase frictions in the coming decade.

The potential disruptors include change of leadership in either country – or indeed both. That would not necessarily mean change in the underlying dynamics but rather short-term turbulence. A new leader, who enjoys wide democratic legitimacy and is determined to conduct ambitious structural reforms in either country, may seek to patch up relations and pivot closer to Europe and the US. At the very least, direct opposition to the liberal West may lose its edge in such a scenario. If so, the West will be regarded less as posing a threat to the regimes' longevity and more as a source of solutions to numerous internal problems. This might undermine the anti-Western consensus uniting Moscow and Ankara.

Alternatively, a prolonged power struggle and the emergence of a weak leader in one of the capitals may put bilateral relations under strain. The stronger side may try to take advantage of internal disarray in the partner state to boost its power and influence in the neighbourhood. The weaker leader may pursue a more nationalistic and confrontational course of action in order to consolidate his grip on power domestically. One way or another, the transition to a less personalistic style of leadership could undercut transactionalism and set the two sides on a path towards more risky and confrontational behaviour.

Another factor which could shape Russia's perceptions negatively is the centrality of Islam in Turkish foreign policy.

Perceptions have played an essential role in the dramatic improvement in Russian-Turkish relations. But perceptions are never fixed, they constantly evolve and mutate. Thus, it cannot be ruled out that one side or both will increasingly regard the other as a threat rather than an opportunity. In the aftermath of the annexation of Crimea and Russia's military prowess in the Black Sea, Turkey has been calling for a greater NATO presence in the region. Should Russia engage in new wars and/or further expand its military foothold in that part of the world, Turkey's security perceptions are likely to change. But Russia may revise its perception of Turkey too. Over the last year, Ankara has been taking steps to intensify military cooperation with Ukraine.

If the Kremlin reignites the war in Ukraine, Turkey's supply to Kyiv of Turkish drones targeting Russian troops in Donbas will be regarded as an unfriendly act. Another factor which could shape Russia's perceptions negatively is the centrality of Islam in Turkish foreign policy. Moscow is not concerned about Ankara deploying religion in the Middle East or the Balkans.

However, such an approach in the Caucasus and Central Asia would certainly trigger a strong reaction from the Kremlin.

Hitherto the *rapprochement* has been substantially driven by economic interests. However, the trade links between Moscow and Turkey may weaken in the coming decade. Further diversification of gas imports coupled with a potential decline in demand could drive down Gazprom's profits in Turkey. The contraction of the Russian market would undercut the profits of Turkish construction companies in Russia. New episodes of economic warfare between the two could inflict more damage and undermine mutual trust. The pivot to China needs to be factored in too. In the next decade Turkey's trade with China is poised to surpass its trade volume with Russia. Thus, for both the economic partnership with China will outweigh the importance of bilateral economic exchanges.

Russia and Turkey have proved to be quite talented tightrope walkers in the common

neighbourhoods. At critical junctures in bilateral relations, they have found ways to step back from escalation and restore the *status quo*. But this dexterity cannot be taken for granted; the history of international relations abounds with examples of miscalculations and patron states being dragged into conflicts by client states. Although Russia's heavy military presence in Armenia and parts of Nagorno-Karabakh provides strong deterrence against resumption of hostilities, this scenario cannot be totally ruled out. The complex mosaic of conflicts in the Middle East and North Africa represents another minefield for Russian-Turkish relations in the years to come.

The complex mosaic of conflicts in the Middle East and North Africa represents another minefield for Russian-Turkish relations.

success. The EU will need to adopt a fine-tuned approach, which relies on both coercion and co-option. Europe's economic sanctions against Turkey have high potential to deter Ankara's bullying tactics. At the same time, the EU will have to keep the lines of communication open and under the right circumstances offer Turkey closer integration in the European market and thus more economic advantages. Europe could also play more actively on Russian-Turkish differences in the neighbourhood. The EU may encourage Turkey to open the border with Armenia, a move which would ultimately increase Ankara's influence in the South Caucasus. Europe and Turkey can also complement each other in strengthening statehood and resilience in Ukraine, Georgia and Moldova.

WHAT ARE THE IMPLICATIONS FOR THE EU?

Turkey and Russia are both strategically important neighbours to the EU. Despite the current challenges, the Union has a long-term interest in building a functioning, cooperative relationship with both countries. Although hardly easy, relations with Turkey offer more opportunities for EU policy initiatives than those with Russia. Turkey and the EU have plenty of problems with each other but also shared interests, and intertwined economies and security arrangements.

That is why the EU has to pursue differentiated policies towards Turkey and Russia, putting aside their 'family resemblance' ⁽²⁾. As Turkey is a member of NATO and deeply connected to the European market, a customised strategy *vis-à-vis* Ankara has higher chances of

Some measures – in particular those aimed at increasing the EU's own resilience – essentially target both Russia and Turkey. The EU will need to fend off disinformation campaigns launched by either country, drastically reduce opportunities for money laundering and illicit financial flows as well as boost its cyber defence capabilities and counter intelligence operations carried out by Moscow and Ankara on European soil, including 'active measures'.

In the case of both Russia and Turkey, it is in the interests of the EU to coordinate and act together with the US. For example, greater coordination on arms sales to Turkey is one area which requires more focus and attention. Unity and an enhanced transatlantic partnership will increase the chances of Turkey gradually altering its calculations.

It is easy to dismiss all this as a pipedream. But the EU needs to come to terms with its complex neighbourhood where two ambitious powers are acting more assertively *vis-à-vis* the Union

(2) Torbakov, I., 'Turkey and Russia: A paradox of family resemblance', Eurozine, 27 September 2019 (<https://www.eurozine.com/turkey-and-russia-a-paradox-of-family-resemblance/>).

and its partners. The EU needs to develop strategies to defend its interests in a more turbulent geopolitical environment, in a world where multipolarity threatens to replace multilateralism and where brute force increasingly trumps norms and rules.

ABBREVIATIONS

AKP

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

bcm

billion cubic metres

BlackSeaFor

Black Sea Naval Cooperation Task Group

BRI

Belt and Road Initiative

BTC

Baku–Tbilisi–Ceyhan pipeline

BTE

Baku–Tbilisi–Erzurum pipeline

CENTCOM

United States Central Command

EAEU

Eurasian Economic Union

EEZ

Exclusive Economic Zone

FDI

Foreign direct investment

FSA

Free Syrian Army

FSB

Federal Security Service (*Federal'naya sluzhba bezopasnosti Rossiyskoy Federatsii*)

FTA

Free Trade Agreement

GDP

Gross domestic product

GNU

Government of National Unity

GRU

Russian military intelligence agency (*Glavnoye Razvedyvatelnoye Upravlenie*)

IDPs

Internally displaced persons

ISIS

Islamic State in Iraq and Syria

LNA

Libyan National Army

LNG

Liquefied natural gas

MHP

Nationalist Action Party

MoU

Memorandum of Understanding

NATO

North Atlantic Treaty Organization

NGO

Non-governmental organisation

OSCE

Organization for Economic Cooperation and Development

PIC

Peace Implementation Council

PKK

Kurdistan Workers' Party (*Partiya Karkerên Kurdistanê*)

PMCs

Private military contractors

PYD

Democratic Union Party (*Partiya Yekîtiya Demokrat*)

SDF

Syrian Democratic Forces

SMEs

Small and medium-sized enterprises

TANAP

Trans-Anatolian Natural Gas Pipeline

TAP

Trans Adriatic Pipeline

TFP

Tailored Forward Presence

TIKA

Turkish Cooperation and Coordination Agency

UAE

United Arab Emirates

UAV

Unmanned aerial vehicle

UN

United Nations

YPG

People's Protection Forces (*Yekineyên Parastina Gel*)

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Relations between Russia and Turkey are a curious mix of fierce competition and close cooperation: their ‘cooperative rivalry’ is an open challenge to the EU, given the two powers’ embrace of authoritarianism, expansionary ambitions and preference for unilateralism over multilateralism.

This *Chaillot Paper* explores the factors that cement Russian-Turkish relations despite clashing interests and increasingly contentious regional agendas. The two countries are drawn together due to their shared authoritarian models of governance and similar strategic cultures and operational codes. Cooperation between Moscow and Ankara is furthermore rooted in economic interdependence. Albeit suspicious of each other’s intentions, Russia and Turkey view one another as indispensable partners in the geopolitical arena, managing flashpoints in the Middle East and North Africa as well as in the broader Black Sea region. Although coming close to confrontation on several occasions, they have – so far – always managed to step back from the brink and keep conflicts in check.

The volume examines the future prospects of the Russo-Turkish *rapprochement*, while analysing its repercussions for Europe’s strategic interests, and explores how the EU should address the challenges posed by the Russian-Turkish partnership.