

January 23, 2023

TextOre 

Türkiye's Balancing Act

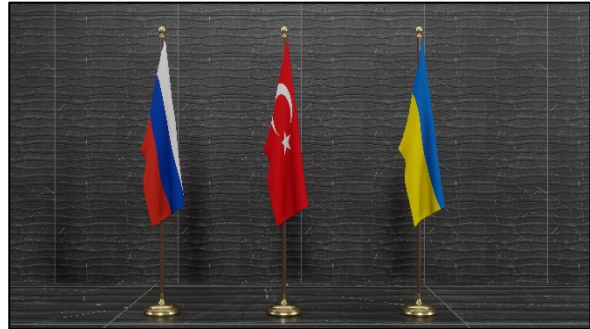
Prepared By
Miranda Alsop and Benjamin Weber



Türkiye's Balancing Act

by TextOre analysts Miranda Alsop and Benjamin Weber

Türkiye has played a central role in the ongoing Ukraine war by leveraging what might as easily be vulnerabilities – a location at the center of hostilities in a region in which it is already a party to two other armed conflicts and its economic dependence (of varying degrees) on both combatants – into strengths through assertive diplomacy.



It has succeeded in these roles by dint of its own efforts certainly, but also because the major players all see a value in (or at least a use for) Turkish diplomacy. That balance is precarious and could be tipped by any of several external factors outside Türkiye's control, by Türkiye's own international ambitions leading it into a misreading of the moment, or by the domestic political concerns expected to dominate 2023 presidential and parliamentary elections. In concrete terms, of all the potential mediators to the conflict, Turkish President Erdogan is the only one who has chalked a win. Whether he can bridge the substantial gap between the two parties and bring an end to the war, however, remains to be seen. Meanwhile, given the overlapping webs of trade to the east and sanctions from the west, Ankara will need to remain nimble and attentive to ensure that Türkiye can address its domestic needs without running afoul of its many partners.

Literally as well as figuratively, Türkiye is at the center of Russia's war on Ukraine, which has added substantially to the challenges Ankara faced already with its own involvement in the Syrian civil war, the recent conflict between its client Azerbaijan and Russia's ally Armenia, and its always-complex relationship with Iran. A recent Congressional Research Service (CRS) report noted that, while Türkiye is dependent on NATO and the United States for security, it is still dependent on Russia and Iran for energy. "Without a means of global power projection or major natural resource wealth," CRS contended, "Türkiye's military strength and economic well-being appear to remain largely dependent on these traditional relationships."ⁱ Most analysts judge Türkiye has played this tricky hand well. Ankara has transformed its precarious position between Russia and Ukraine into a diplomatic asset, increasing its geopolitical significance, argues Yevgeniya Gaber, a Ukrainian foreign policy expert.ⁱⁱ Türkiye relies on Russia for trade and energy, but Türkiye still needs an independent Ukraine, argues Rich Outzen, a non-resident scholar at the Atlantic Council. If Russia were to absorb Ukraine, it would present a more serious threat to Turkish regional security, whereas a strong Ukraine

would be beneficial, especially as a trading partner across the Black Sea.ⁱⁱⁱ Therefore, Erdogan supplies Ukraine with weapons, while capitalizing on Moscow's isolation by increasing bilateral trade.^{iv}

Türkiye relies on Russia for trade and energy, but Erdogan faces the geopolitical imperative to preserve an independent Ukraine. If Russia were to absorb Ukraine, it would present a more serious threat to Turkish regional security, whereas a strong Ukraine would be beneficial, especially as a trading partner across the Black Sea.^v Therefore, Erdogan supplies Ukraine with weapons, while capitalizing on Moscow's isolation by increasing bilateral trade.^{vi}



Ankara has explicitly condemned the war and reiterated its support for Ukraine's territorial integrity. Türkiye has voted in favor of UN General Assembly resolutions defending Ukraine's territorial integrity since 2014.^{vii} It strongly criticized the illegitimate referendums held not only in the four occupied territories in September 2022, but also in Crimea in 2014.^{viii} Exercising its rights under the 1936 Montreux Convention, Türkiye closed the Dardanelles and Bosphorous straits to warships.^{ix,x} Erdogan has maintained cordial ties with his Ukrainian counterpart, President Volodymyr Zelenskiy, through dialogue and offers of assistance on the humanitarian situation.^{xi} During a visit to Lviv in August 2022, he also committed (albeit comparatively modestly) to helping rebuild Ukraine's infrastructure, including roads and bridges.^{xii}

The significant – and delicate – element of the Turkish-Ukrainian relationship is Türkiye's provision of drones and other military equipment, which played a significant role in the early months of the war. Ukraine and Türkiye's military cooperation increased rapidly at that time, with Turkish exports to Kyiv rocketing up 5,000% in

the first two months of 2022.^{xiii} Turkish defence companies Baykar, Aselsan, and Roketsan^{xiv} all provided Ukraine with weapons.^{xv} OSINT defense analysts at Oryz reported that although “Türkiye has remained the friendliest of all the NATO countries towards Moscow, it is also the only NATO country that has supplied armament to Ukraine without the explicit condition not to use these against targets located inside Russia.”^{xvi}

Turkish drones, particularly the Bayraktar TB2 drones, made significant contributions to Ukraine’s ability to destroy Russian equipment.^{xvii} The importance of Turkish weapons then was highlighted by a meeting between Zelenskiy and the CEO of Baykar, Haluk Bayraktar, in September 2022. Zelenskiy thanked Bayraktar and his company for boosting the power of the Ukrainian Armed Forces and thanked the Turkish government and citizens for their support.^{xviii} Over time, however, their success rate has decreased, with some observers believing that the concentration of Russian forces in Donetsk and Luhansk with better force protection, as well as lessons learned from the early days of the war, have reduced the effectiveness of the platform.^{xix} Some analysts have suggested in particular that examination of downed units has allowed the Russians to identify and jam the frequencies employed by the drones.^{xx} The number of TB2 drones used by the Ukrainian Armed Forces is decreasing, and military analysts suggests that currently TB2 losses are currently higher than Turkish production.^{xxi}

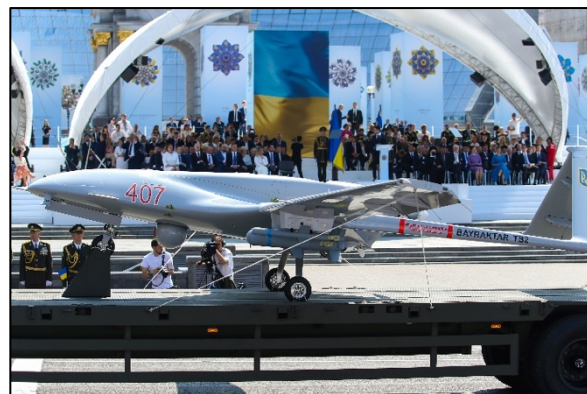


Photo from the 24 August 2021 parade commemorating 30 years of Ukrainian Independence
Lina Reshetnyk/Shutterstock.com

Production Partnership

Unlike many of the arms transfers to Ukraine, which have been made by governments from their own available stocks, Turkish drones have been transferred directly from manufacturer Bakyar. Since March 2022, half of the Bayraktar TB2 drones have been donated, while the others have been sold at half price.^{xxii} However, Bakyar’s relationship with Ukraine goes deeper. Since November 2021, Ukrainian high-tech engine manufacturer Ivchenko-Progress has been supplying Baykar with jet engines for the drones.^{xxiii} Despite the outbreak of war, the two companies continue to work together. Baykar CEO Haluk Bayraktar reaffirmed his commitment to the project in August and announced plans to assemble Akinci and Kizilelma drones in Ukraine, stating that construction of a factory has already begun.^{xxiv} In response, Kremlin spokesperson, Dmitry Peskov, threatened that any such factory would fall under Russia’s “demilitarization” aims.^{xxv}

Unsurprisingly, the sale of Turkish weapons to Ukraine has caused anger within the Kremlin. In line with Russian propaganda, Foreign Minister Sergei Lavrov warned countries against arming “the Nazi-controlled Kiev regime” and Peskov claimed the Ukrainian armed forces would use the Turkish weapons “against their own people.”^{xxvi} Russian state media has also questioned whether Russia can consider Türkiye a friend and ally when “your ally sells weapons to your opponent.”^{xxvii} The Turkish government thus far has sought to quieten Russian complaints by reiterating the position that drones are sold by private companies and do not constitute arms sales from the Turkish state.^{xxviii} The Russians were unimpressed: official news agency TASS quoted Russian Ambassador to Türkiye Alexey Yerkhov as saying, “Explanations like “business is business” won’t work, since your drones are killing our soldiers, that’s the reason why they are being purchased.”^{xxix}

Nevertheless, Russia may be tolerating the military assistance simply because President Vladimir Putin needs Erdogan, just as much as Erdogan needs Putin.

Even with Turkish drone sales to Ukraine, Erdogan is confident that Putin knows he cannot risk his relationship with him, and with that Russia’s relationship with Türkiye. From a diplomatic perspective, Galip Dalay from Chatham House argues Putin uses his relationship with Erdogan to signal to the international community that Russia is not as isolated as the West wants.^{xxx} In October, at the Valdai Conference in Sochi, Putin lavished praise on Erdogan, calling him “a strong, firm leader who is guided by the interests of Türkiye, the Turkish people, and the Turkish economy.”^{xxxi}



quetions123/shutterstock.com

Turkish concerns are more practical: domestic economic difficulties and next year’s presidential election mean that Ankara does not want to intensify an already disastrous economic situation. Türkiye is the only member of NATO not to have imposed sanctions against Russia, on which it relies heavily for trade, tourism, and energy imports.^{xxxii,xxxiii} The two leaders have met face-to-face four times in as many months, at each opportunity pledging closer trade and energy ties. A trip to Sochi in 5 August saw Putin and Erdogan agree to increase cooperation in transport, agriculture, finance, and construction.^{xxxiv} Russian citizens are also huge investors into Turkish real estate. Russians are willing to pay high prices to acquire Turkish property in order to receive Turkish citizenship in return.^{xxxv} This, too, may be an indicator of the balancing position played by Türkiye: while not embracing sanctions or closing its airspace to Russian flights allows for the possibility that Türkiye will be a venue in which oligarchs evade sanctions (more below), it also provides a viable

haven for those with the means to flee political persecution or possible conscription.^{xxxvi}

A key element of the relationship remains energy resources. Thanks to the TurkStream pipeline, Russia was already responsible for 45% of Türkiye's gas imports.^{xxxvii} At the September 2022 meeting of the Shanghai Cooperation Organization in Samarkand, Uzbekistan, the two sides confirmed earlier reports that 25% of Russian gas supplies to Türkiye would be paid for in roubles.^{xxxviii} The switch to roubles was a boost for Putin, who is looking to bolster a Russian currency cut off from the international financial system. In an October 2022 bilateral meeting between Putin and Erdogan in Astana, Putin proposed turning Türkiye into a Russian gas hub for Europe, stating that Gazprom and Turkish state-owned Botas would build a joint pipeline to deliver gas to third countries.^{xxxix} Speaking to his parliamentary deputies, Erdogan called it a "vital opportunity."^{xi}

Despite Erdogan's enthusiasm, experts judge that the project is likely untenable. The first hurdle would be finding customers who would buy the Russian gas, as Europe turns away from Russia towards other providers. The second is the cost. Mikhail Krutikhin, a partner at Moscow-based RusEnergy predicts the costs for Türkiye alone would be USD 30 billion and therefore believes it's unlikely that "the project will see the light of day."^{xii} Either way, Erdogan is likely to use the gas project proposal to his advantage. Krutikhin believes he will attempt to use it to gain discounted energy prices ahead of next year's elections, in the hopes that this can help resolve Türkiye's current financial crisis.^{xiii}

These talks of deeper trade and energy integration have in turn sparked calls for secondary sanctions against Türkiye. Underlining these concerns are the figures: this year Turkish imports from Russia have more than doubled, pushing Russia to the top of the list of countries from which Türkiye imports.^{xiii} In the other direction, Turkish exports to Russia have leapt by 113%, making Türkiye the world's top exporter to Russia.^{xiv} The European Union has also criticized Ankara for not enforcing sanctions and warned that European companies could also be using Türkiye to circumvent sanctions.^{xv} U.S. Treasury Deputy Secretary Wally Adeyemo raised similar concerns in an August 2022 meeting with Turkish Deputy Finance Minister Yunus Elitas, and media report he sent a letter cautioning that Turkish companies risked consequences if they did business with Russian institutions under sanctions.^{xvi,xvii} Some Turkish companies did react to the Treasury statement: Turkish state banks Halkbank, Ziraat Bank, and VakifBank stopped servicing Russian payment system "Mir," which is used by thousands of Russians in Türkiye every year.^{xviii,xlix} Maria Shangina, a specialist on international sanctions, argues that Putin's gas proposals come just as the West's patience may be running out. "The more Türkiye exploits this space between legal and illegal activities with Russia, I think there might be a snapping point from the West to impose sanctions," she said.ⁱ

Whatever their uneasiness about economic engagement, both Europe and the United States have appreciated Türkiye’s diplomatic achievements. Erdogan played a direct role in orchestrating the only tangible agreements between Moscow and Kyiv. Erdogan regularly holds talks with both Zelenskiy and Putin, often speaking to both on the same day and paying working visits to both Ukraine and Russia in August 2022.ⁱⁱ This continued dialogue has allowed Ankara to secure grain supplies with the Istanbul Agreement; mediate a high-profile prisoner swap;ⁱⁱⁱ be the base for negotiations held in March and April 2022;ⁱⁱⁱ and host a meeting between CIA director Bill Burns and his Russian counterpart Sergei Naryshkin to discuss the consequences of using nuclear weapons.^{iv}

Arguably Erdogan’s greatest achievement has been the grain deal, brokered in conjunction with United Nations Secretary-General Antonio Guterres.^v In July 2022, Erdogan was central to navigating the deal to permit Ukraine grain exports by sea, in doing so countering global food shortages and food price inflation. The grain deal almost collapsed at the end of October due to Russian allegations that Ukraine (with British help) had attacked the Black Sea Fleet.^{vi} Erdogan’s personal intervention on 1 November led Russia to backtrack on its decision to suspend the deal.^{vii} Speaking to



Mykola Tys/shutterstock.com

ATV on the day of the U-turn, Erdogan boasted of his involvement. “He [Putin] doesn’t agree to open this grain corridor through others. But with me, when I call... straight away he opened the grain corridor.”^{viii} Later in the month, Ankara again played a central role in extending the grain deal past its original 19 November deadline. Announcing the 120-day extension, Turkish Foreign Minister Mevlüt

Çavusoglu tweeted, “Istanbul is the beacon for hope! Today the parties agreed to extend the duration of the Istanbul Grain Deal for another 120 days. We will continue to work tirelessly to achieve peace under the leadership of President Erdogan.”^{ix}

Türkiye’s diplomatic position is seen by the Turkish government as a way to improve Erdogan’s popularity domestically and Türkiye’s position in the world stage. Türkiye is expected to hold presidential and parliamentary elections in 2023, and an August 2022 survey by polling company Metropoll showed any of Erdogan’s putative opponents defeating him by at least six percentage points.^x While Erdogan’s Justice and Development (AK) Party polled highest among parliamentary parties, the survey suggested that his Cumhur (“People’s”) Alliance with the Nationalist Movement Party (MHP) would be defeated by the opposition coalition Millet (“Nation”) Alliance.^{xi} The economy remains the most important issue for voters, and

inflation remains persistent and high.^{lxii, lxiii} The question, therefore, is whether foreign policy success can carry Erdogan to victory. CRS assesses that Erdogan's foreign policy agenda resonates with both his parliamentary coalition partners and the Turkish public.^{lxiv} Ozgur Unluhisarcikli, director of the German Marshall Fund in Ankara, highlighted that Erdogan's popularity is stabilizing: "compared to last June, all major polls suggest Erdogan has consolidated his supporters."^{lxv} However, polls suggest there is still a long way to go and that there is still huge frustration amongst the electorate.^{lxvi}

Beyond immediate electoral considerations, however, is Erdogan's strategic vision, which has led Türkiye to play significant roles in Eurasia, Africa, and the Middle East. Anton Fedyashin argues that Erdogan wishes to strengthen Türkiye's influence as a regional player and to act as a bridge nation between Europe and Eurasia in what is a period of greater Eurasian integration.^{lxvii} As noted in our previous reports, Türkiye is a critical player in efforts to develop Central Asia and Transcaucasia as an alternative [trade corridor](#) and [energy supplier](#).^{lxviii}

On the international stage, Ankara's position could further Türkiye's geopolitical influence. Erdogan's spokesman Ibrahim Kalin has boasted that Erdogan is now in demand from foreign leaders who are looking for a way to reach Putin. "If everyone burns bridges with Russia... who will the Russians talk to, who will talk to the Russians?"^{lxix} Kalin's analysis seems borne out by the fact that Erdogan was one among only several leaders with whom President Joe Biden met one-on-one at the G20 Summit in Bali, where Biden again expressed his gratitude for Erdogan's efforts to renew the grain deal.^{lxx} That said, the big prize – mediating peace talks – continues to be beyond his reach. To be fair, the two sides maintain positions that are far enough apart that talks would be challenging at best, but if the dynamic shifted, Erdogan's position between Zelenskyy and Putin makes him best placed to convene the talks.^{lxxi}

Ukraine is not the only issue on the agenda, and Turkish diplomacy also carries risk. Three issues in particular may impact Türkiye's ability to maintain its current diplomatic posture: Syria, the Armenia-Azerbaijan conflict, and Türkiye's role as a potential spoiler in NATO expansion. In **Syria**, Türkiye has been on opposing sides with Russia and at odds with the United States over U.S. relations with Kurdish forces that Ankara sees as an extension of the PKK. Perhaps believing that both major powers need him enough in Ukraine not to thwart his ambitions, Erdogan is threatening an on-the-ground invasion in Northern Syria in retaliation for a 13 November 2022 bombing in Istanbul that Ankara blames on Kurdish groups. The diplomatic risks to carrying through on the threat are clear: in a 30 November phone call with Turkish Defense Minister Hulusi Akar, U.S. Defense Secretary Austin expressed "strong opposition to a new Turkish military operation in Syria."^{lxxii}

In the **South Caucasus**, Türkiye has always favored Azerbaijan, and observers credit Turkish military assistance with playing a critical role in Baku's recent battlefield gains.^{lxxiii} Meanwhile, Armenia's traditional patron Russia and the Collective Security Treaty Organization it leads have not intervened on its behalf, and Yerevan has been public in its complaints.^{lxxiv} Here, Erdogan may be seeking to capitalize on his advantage by taking on a new "balancing" role. Ankara and Yerevan have agreed to establish diplomatic relations and to open their border for third-country nationals.^{lxxv}

In **Europe**, Türkiye has yet to give approval to the accession of Sweden and Finland to NATO, with Erdogan demanding an end to arms embargos by the two countries and to their alleged support for Kurdish groups such as the Kurdistan Workers Party (PKK), People's Protection Units (YPG) – which Ankara views as the PKK's Syrian offshoot – and Gülen movement.^{lxxvi} Türkiye, Sweden, and Finland signed a Trilateral Memorandum in June 2022, which stipulated that Finland and Sweden recognized the PKK as a terrorist organization and that their arms transfer policies would align with NATO standards.^{lxxvii} The outstanding issues now seem largely to do with extraditions the Turks have requested, particularly from Sweden. Observers believe that a principal motivator of Türkiye's current hard line is the 2023 elections, with Erdogan likely keen to show himself as strong on security issues.^{lxxviii} That said, he needs to be mindful of not being seen as a spoiler to the Alliance, on whom as noted he remains reliant for Türkiye's own security. Perhaps the most public sign that the Alliance's patience is finite were uncharacteristically pointed remarks by NATO Secretary General Stoltenberg during his November visit to Ankara:

Finland and Sweden have delivered on their agreement with Türkiye. They have become strong partners in our joint fight against terrorism, in all its forms and manifestations. And they are clearly committed to a long-term engagement with Türkiye to address your security concerns.

So it is time to welcome Finland and Sweden as full members of NATO. Their accession will make our Alliance stronger, and our people safer.

In these dangerous times, it is even more important to finalise their accession, to prevent any misunderstanding or miscalculation in Moscow and to send a clear message to Russia that NATO's door remains open.^{lxxix}

Having advanced Türkiye's agenda on several fronts, Erdogan now needs to manage – or better end – the crises that have created opportunities for him.

With Russia, Türkiye has moved from even-handedness to a more complex approach of open support of Ukraine without severing ties with Russia. Şaban Kardaş judged that, while Ankara will want to communicate to Moscow that its intentions are in achieving balance rather than increasing hostility, Türkiye cannot accept aggressive, "revisionist" Russian behavior and will take actions to preserve its interests.^{lxxx} Looking at NATO, choices Türkiye makes in Syria and on NATO

expansion will shape its relations with allies on which it relies. Sinan Ülgen argues that the geopolitical situation shaped Erdogan's actions in NATO and Syria and gave him the space to show that Türkiye can still exert leverage within the Alliance to push for its own demands and gain concessions on national security issues.^[xxxi] The question is whether he will test that leverage to the breaking point. Finally, while the Caucasus has been a long-simmering conflict, instability there works against any plans Türkiye may have to develop trade and energy corridors that would aid it economically, and so Ankara will need to weigh its traditional support of Azerbaijan against wider strategic objectives.

Key factors shaping future developments:

- **Ankara's balancing act has worked... so far.** A miscalculation by the Turks, or unforeseen escalations or geographic widening of the war in Ukraine (or Syria or the South Caucasus, for that matter), run the risk of changing the landscape in ways inimical to maintaining that delicate balance.
- **Everyone loves a winner.** Whatever tensions may exist between the Alliance, Ukraine, Russia, and Türkiye, negotiating (or facilitating negotiations) that ended the conflict would be both a triumph and a vindication of Ankara's diplomatic balancing efforts. Should Erdogan prove unsuccessful or incapable in the mediator role, however, it might cost Türkiye much of the good will that has led the various sides to overlook areas of tension.
- **All politics are local – not just in Türkiye.** While many of Erdogan's approaches to issues overseas reflect his calculations regarding elections at home, he needs to understand that the leaders with whom he engages face the same imperatives. The ability of leaders to address Erdogan's priorities rests in no small part on them being able to demonstrate to their constituents that any concessions were beneficial to the national interest.

ⁱ Jim Zanotti and Clayton Thomas, "Turkey (Türkiye): Background and U.S. Relations In Brief," Congressional Research Services, 05 August 2022, <https://crsreports.congress.gov/product/pdf/R/R44000>

ⁱⁱ Yevgeniya Gaber, "How long can Turkey play both sides in the Ukraine war?," The Atlantic Council, 18 August 2022, <https://www.atlanticcouncil.org/blogs/new-atlanticist/how-long-can-turkey-play-both-sides-in-the-ukraine-war/>

ⁱⁱⁱ Atlantic Council, "How long can Turkey play both sides in the Ukraine war?," 18 August 2022, <https://www.atlanticcouncil.org/blogs/new-atlanticist/how-long-can-turkey-play-both-sides-in-the-ukraine-war/>

^{iv} President of the Republic of Türkiye, "President Erdogan meets with President Putin of Russia," 13 October 2022, <https://www.tccb.gov.tr/en/news/542/140141/president-erdogan-meets-with-president-putin-of-russia>

^v Atlantic Council, "How long can Turkey play both sides in the Ukraine war?," 18 August 2022, <https://www.atlanticcouncil.org/blogs/new-atlanticist/how-long-can-turkey-play-both-sides-in-the-ukraine-war/>

^{vi} President of the Republic of Türkiye, "President Erdogan meets with President Putin of Russia," 13 October 2022, <https://www.tccb.gov.tr/en/news/542/140141/president-erdogan-meets-with-president-putin-of-russia>

^{vii} Among the resolutions receiving "yes" votes are:

A/RES/68/262 "Territorial integrity of Ukraine," 27 March 2014, <https://digitallibrary.un.org/record/767565?ln=en>

A/RES/ES-11/1 "Aggression against Ukraine," 02 March 2022, <https://digitallibrary.un.org/record/3959039?ln=en>

A/RES/ES-11/2 "Humanitarian consequences of the aggression against Ukraine," 24 March 2022,

<https://digitallibrary.un.org/record/3965954?ln=en>

A/RES/ES-11/3 "Suspension of the rights of membership of the Russian Federation in the Human Rights Council," 07 April

2022, <https://digitallibrary.un.org/record/3967778?ln=en>

A/RES/ES-11/4 "Territorial integrity of Ukraine: defending the principles of the Charter of the United Nations," 12, October 2022,

<https://digitallibrary.un.org/record/3990400?ln=en>

A/RES/ES-11/5 "Furtherance of remedy and reparation for aggression against Ukraine," 14 November 2022,

<https://digitallibrary.un.org/record/3994052?ln=en>

^{viii} A press release from the Foreign Ministry on 30 September stated, "we reject Russia's decision to annex the Donetsk, Luhansk, Kherson, and Zaporizhzhia regions of Ukraine." It continued that the referenda constitute "a grave violation of the established principles of international law" and "cannot be accepted." Ministry of Foreign Affairs of the Republic of Türkiye, "No: 300, 30 September 2022, Press Release Regarding Russia's Annexation of Some Regions of Ukraine," 30 September 2022, https://www.mfa.gov.tr/no_300_rusya-nin-ukrayna-nin-bazi-bolgelerini-ilhaki-hk.en.mfa

^{ix} Article 19 of the Convention states that "Vessels of war belonging to belligerent Powers shall not, however, pass through the Straits except in cases arising out of the application of Article 25 of the present Convention, and in cases of assistance rendered to a State victim of aggression in virtue of a treaty of mutual assistance binding Türkiye, concluded within the framework of the Covenant of the League of Nations, and registered and published in accordance with the provisions of Article 18 of the Covenant." League of Nations, "Convention Regarding the Regime of the Straits," signed at Montreux 20 July 1936, <https://treaties.un.org/doc/Publication/UNTS/LON/Volume%20173/v173.pdf> CRS reported that "An exception to the Straits' closure under Article 19 permits access to Russian ships if they are returning to their designated Black Sea bases, but Türkiye foreign minister has stated that ships returning to base 'should not be involved in the war'... In March 10 correspondence with CRS, a Turkish official explained that Türkiye has advised all countries to refrain from sending warships through the Straits, but has not formally closed the Straits to non-belligerent states." Jim Zanotti and Clayton Thomas, "Russia's Invasion of Ukraine: Turkey's Response and Black Sea Access Issues," Congressional Research Service Insight, 11 March 2022, <https://crsreports.congress.gov/product/pdf/IN/IN11885>

^x Naval News, "Turkey closes the Dardanelles and Bosphorous to warships," 28 February 2022, <https://www.navalnews.com/naval-news/2022/02/Turkey-closes-the-dardanelles-and-bosphorus-to-warships/>

^{xi} President of the Republic of Türkiye, "Call with President Zelenskiy of Ukraine," 24 April 2022, <https://www.tccb.gov.tr/en/speeches-statements/558/136606/phone-call-with-president-zelenskiy-of-ukraine>

^{xii} Data from the Kiel Institute shows Türkiye is lowdown the list of countries sending humanitarian aid to Ukraine. The Kiel Institute has monitored 40 countries, including EU countries and the G7. Out of the 40 countries, Türkiye ranked 39 out of 40 for humanitarian commitments. Instead, the Turkish government has been offered different forms of humanitarian support, such as housing Ukrainian orphans. Kiel Institute for the World Economy, "Ukraine Support Tracker," <https://www.ifw-kiel.de/topics/war-against-ukraine/ukraine-support-tracker/>; President of Ukraine, "According to the agreements between the first ladies of Ukraine and Türkiye, the Odesa children's home was evacuated to Ankara," 22 November 2022, <https://www.president.gov.ua/en/news/zgidno-z-domovlenostyami-mizh-pershimi-ledi-ukrayini-j-turec-79337>; President of Ukraine, "President of Ukraine, the President of Türkiye and the UN Secretary-General held a trilateral meeting in Lviv," 18 August 2022, <https://www.president.gov.ua/en/news/glava-ukrayinskoyi-derzhavi-prezident-turechchini-ta-general-77145>

^{xiii} Ukraine and Türkiye had already established a bilateral relationship in defence. However, data published by the Turkish Exporters Assembly showed in the first two months of 2022 exports had jumped by 5,491% in comparison to 2021. Exports in January and February 2022 totalled \$59 million in comparison to \$970,000 in 2021, Ragip Soylu, "Russia-Ukraine war: Turkey defence exports to Kyiv up 5,000 percent," Middle East Eye, <https://www.middleeasteye.net/news/russia-ukraine-war-Turkey-defence-exports-climb>; Aselsan, "Export of Radios from Aselsan to Ukraine," 10 October 2017, <https://www.aselsan.com.tr/en/press-room/news-detail/export-of-radios-from-aselsan-to-ukraine>

- ^{xiv} Baykar Defence, <https://www.baykartech.com/en/>; Aselsan, <https://www.aselsan.com.tr/en>; Roketsan, <https://www.roketsan.com.tr/en>
- ^{xv} In addition to the drones, Türkiye has sent other equipment, such as a shipment of 50 mine-resistant, ambush-protected (MRAP) vehicles. Burak Ege Bekdil, "Turkey sends 50 mine-resistant vehicles to Ukraine, with more expected," Defense News, 22 August 2022, <https://www.defensenews.com/land/2022/08/22/Turkey-sends-50-mine-resistant-vehicles-to-ukraine-with-more-expected/>
- ^{xvi} Stijn Mitzer and Joost Oliemans, "The Stalwart Ally: Turkey Arms Deliveries To Ukraine," Oryx, 21 November 2022, <https://www.oryxspioenkop.com/2022/11/the-stalwart-ally-turkiyes-arms.html>
- ^{xvii} The Bayraktar drones are so effective Ukrainian soldiers created a war song in its honor. YouTube, "Bayraktar – Ukrainian War Song," 23 May 2022, <https://www.youtube.com/watch?v=S3FGWPMji6M>
- ^{xviii} President of Ukraine, "President of Ukraine, Baykar CEO discuss cooperation in defense sector," 9 September 2022, <https://www.president.gov.ua/ru/news/prezident-ukrayini-ta-gendirektor-kompaniyi-bajkar-obgovoril-77617>. This may reflect a recognition that Ukraine needs all the supporters and suppliers it can get. In an April press conference, Zelenskyy was more measured in his assessment. "With all due respect to Bayraktar, and to any hardware, I will tell you, frankly, this is a different war," he said. 'Drones may help, but they will not make the difference.'" Stephen Witt, "The Turkish Drone that Changed the Nature of Warfare," *The New Yorker*, 09 May 2022, <https://www.newyorker.com/magazine/2022/05/16/the-turkish-drone-that-changed-the-nature-of-warfare>
- ^{xix} Vikram Mittal, "The Ukrainian Military Is Changing Its Tactics With Bayraktar TB2 Drones," Forbes, 23 June 2022, <https://www.forbes.com/sites/vikrammittal/2022/06/23/ukrainian-military-is-changing-its-tactics-with-the-bayraktar-tb2-drones/?sh=69abb3aa1ec0>; Aaron Stein, "The TB2: The value of a cheap and 'good enough' drone," Atlantic Council, 30 August 2022, <https://www.atlanticcouncil.org/content-series/airpower-after-ukraine/the-tb2-the-value-of-a-cheap-and-good-enough-drone/>
- ^{xx} Mittal 2022.
- ^{xxi} Twitter, "Babak Taghvaei – The Crisis Watch," 28 November 2022, <https://twitter.com/BabakTaghvaei/status/1597293178088206337>
- ^{xxii} Oryx, "The Stalwart Ally: Turkey arms deliveries to Ukraine," 21 November 2022, <https://www.oryxspioenkop.com/2022/11/the-stalwart-ally-turkiyes-arms.html>
- ^{xxiii} Twitter, "Baykar," 11 November 2022, https://twitter.com/BaykarTech/status/1458831933086052357?ref_src=twsrc%5Etfw%7Ctwcamp%5Etweetembed%7Ctwtterm%5E1458831933086052357%7Ctwgr%5Eee861d925f6655e4bfff7d36c3eeb15e522e3e42%7Ctwcon%5Es1_&ref_url=https%3A%2F%2Fwww.overtdefense.com%2F2021%2F11%2F12%2Fbaykar-puts-in-an-order-for-ai322f-and-ai25tlt-jet-engines-from-ukraine-for-mius%2F
- ^{xxiv} "It's One of Our Ideals, Our Wish, that One Day in the Factory in Ukraine We Will Be Able to Build the New Bayraktar Kizilelma, the Unmanned Fighter,' — Baykar CEO," Come Back Alive, 12 August 2022, <https://savelife.in.ua/en/materials/news-en/its-one-of-our-ideals-our-wish-that-one-en/>; Economic Truth, "Turkish manufacturer Bayraktar has already purchased a site for a plant in Ukraine and has developed a project," 8 August 2022, <https://www.epravda.com.ua/rus/news/2022/08/8/690139/>.
- ^{xxv} Izvestiya, "The Kremlin commented on construction of the Bayraktar plant in Ukraine," 9 August 2022, <https://iz.ru/1376965/2022-08-09/v-kreml-prokommentirovali-stroitelstvo-zavoda-bayraktar-na-ukraine>; Izvestiya, "Unmanned zone: Türkiye will build a drone production plant in Ukraine: Moscow warned that the enterprise will inevitably fall under demilitarization," 31 October 2022,
- ^{xxvi} Lyubov Stepushova, "What is more profitable for Türkiye: to sell Bayraktars to Ukraine or tangerines to Russia?," Pravda, 28 October 2022, https://www.pravda.ru/world/1654149-russia_turkey/
- ^{xxvii} Lenta Ru, "Russia considers Türkiye an ally. Why does Ankara sell weapons to Ukraine?," 21 June 2022, https://lenta.ru/articles/2021/06/21/Turkey_ukraine/?ysclid=lb98yehk9f860479554
- ^{xxviii} In an interview with pro-government newspaper Sabah, Deputy Foreign Minister Yavuz Selim Kiran said that Kyiv purchases drones from private defense company and does not represent an agreement between nations. Reuters, "Turkey balancing Russia ties, says drones to Ukraine are sales not aid, Sabah," 3 March 2022, <https://www.reuters.com/world/middle-east/Turkey-balancing-russia-ties-says-drones-ukraine-are-sales-not-aid-sabah-2022-03-03/> Other media, however, reported that at least the initial deliver of MRAPS was from Turkish military stocks, not from the manufacturer, Turkish firm BMC. Bekdil 2022.
- ^{xxix} "Russian ambassador hits out at Turkish drone sales to Ukraine," TASS [in English] 04 April 2022, <https://tass.com/world/1432069>
- ^{xxx} Dorian Jones, "Putin courts Erdogan, as Turkey claims grain deal success," Voice of America, 22 August 2022, <https://www.voanews.com/a/putin-courts-erdogan-as-turkey-claims-ukraine-grain-deal-success-/6711787.html>
- ^{xxxi} President of Russia, "Meeting of the Valdai International Discussion Club," 27 October 2022, <http://kremlin.ru/events/president/news/69695>
- ^{xxxii} In an interview with reporters in March 2022, Erdogan confirmed that Türkiye would not impose sanctions against Russia. Speaking of this, he stated "I cannot leave my people to freeze in the winter, secondly, I cannot reboot this industry of ours." He

affirmed that his obligation was with the Turkish people. Tass, "Türkiye will not join sanctions against Russia – Erdogan," 25 March 2022, <https://tass.com/politics/1427365>

^{xxxiii} Russia was a \$32.5 billion trade partner as of 2021, a figure likely to increase in 2022. Haberturk, "What is Russia's share in world trade?," 25 February 2022, <https://www.haberturk.com/rusya-nin-dunya-ticaretindeki-payi-ne-3356149-ekonomi>

^{xxxiv} President of Russia, "Conversation with Turkish President Recep Tayyip Erdogan," 5 August 2022, <http://kremlin.ru/events/president/transcripts/69119>

^{xxxv} Justine Mazonier, "Russians and Ukrainians pile into Turkish real estate market," BNE Intellinews, 14 July 2022, <https://intellinews.com/russians-and-ukrainians-pile-into-turkish-real-estate-market-250583/>

^{xxxvi} The European Commission, Türkiye Report 2022, 12 October 2022, https://neighbourhood-enlargement.ec.europa.eu/turkiye-report-2022_en

^{xxxvii} Trading Economics, "Turkey Natural Gas Imports from Russia" <https://tradingeconomics.com/Turkey/natural-gas-imports-from-russia>

^{xxxviii} President of Russia, "Meeting with President of Türkiye Recep Tayyip Erdogan," 16 September 2022, <http://en.kremlin.ru/events/president/news/69364>

^{xxxix} President of Russia, "Meeting with Turkish President Recep Tayyip Erdogan in Astana," 13 October 2022, <http://kremlin.ru/events/president/news/69590>

^{xl} The idea was announced the previous week during a conference in Moscow, which surprised Turkish Energy Minister Fatih Donmez. The following day, Erdogan ordered the Turkish Energy Ministry to start working on proposals.

^{xli} Vladimir Afansiev, "Erdogan steps up backing for Russia's Turkish gas hub plan," Upstream Online, 20 October 2022, <https://www.upstreamonline.com/politics/erdogan-steps-up-backing-for-russia-s-turkish-gas-hub-plan/2-1-1338137>

^{xlii} *Ibid.*

^{xliiii} Turkish Statistical Institute, "Foreign Trade Statistics June 2022," <https://data.tuik.gov.tr/Bulten/Index?p=Dis-Ticaret-Istatistikleri-Haziran-2022-45541>

^{xliv} Lazarao Gamio and Ana Swanson, "How Russia Pays for War," The New York Times, 30 October 2022, <https://www.nytimes.com/interactive/2022/10/30/business/economy/russia-trade-ukraine-war.html>

^{xlv} The European Commission, Türkiye Report 2022, 12 October 2022, https://neighbourhood-enlargement.ec.europa.eu/turkiye-report-2022_en

^{xlvi} READOUT: Deputy Secretary of the Treasury Wally Adeyemo's Meeting with Deputy Finance Minister of Türkiye Yunus Elitas." U.S. Department of the Treasury official website, 19 August 2022, <https://home.treasury.gov/news/press-releases/jy0926>

^{xlvii} At the end of August, the Turkish Industry and Business Association confirmed that it had received a letter from the U.S. Treasury Department warning of consequences if Turkish companies did business with sanctioned Russian companies and individuals. AP News, "Turkey says no need for concern over US sanction warning," 26 August 2022, <https://apnews.com/article/russia-ukraine-middle-east-Turkey-ankara-97439819ff791f1fa92b49d402cbcd75>

^{xlviii} RIA Novosti, Türkiye is forced to look for options for accepting Mir cards, reported a source," 1 November 2022, <https://ria.ru/20221101/mir-1828357515.html>

^{xlix} Rahman Ravelli, "Turkey, Mir and the threat of secondary sanctions," Lexology, 26 September 2022, <https://www.lexology.com/library/detail.aspx?g=6f26c294-bbb2-4c8d-baab-deed2c1bddb3>

^l Dorian Jones, "Erdogan agrees to Putin's plan for Turkey to be a Russian gas hub," 20 October 2022, <https://www.voanews.com/a/erdogan-agrees-to-putin-s-plan-for-Turkey-to-be-russian-gas-hub/6798604.html>

^{li} On 5 August, Erdogan paid a one-day visit to Sochi, Russia, where he met with President Vladimir Putin. This was followed by a one-day visit to Lviv, Ukraine, on the 18 August, where he met with President Volodymyr Zelenskiy and UN Secretary-General Antonio Guterres. President of Russia, "Meeting with President of Türkiye," 5 August 2022, <http://en.kremlin.ru/events/president/news/69119>; President of Ukraine, "President of Ukraine, the President of Türkiye and the UN Secretary-General help a trilateral meeting in Lviv," 18 August 2022, <https://www.president.gov.ua/en/news/glava-ukrayinskoyi-derzhavi-prezident-turechchini-ta-general-77145>

^{lii} Erdogan was the mediator of a high-profile prisoner exchange. The exchange of 270 prisoners of war took place under Türkiye National Intelligence Organization. President of the Republic of Türkiye, "Phone call with President Putin," 28 April 2022, <https://www.tccb.gov.tr/en/speeches-statements/558/136739/phone-call-with-president-putin-of-russia>

^{liiii} President of the Republic of Türkiye, "Phone call with President Putin" and "Phone call with President Zelenskiy," 1 April 2022, <https://www.tccb.gov.tr/en/speeches-statements/558/136351/phone-call-with-president-putin-of-russia-> and <https://www.tccb.gov.tr/en/speeches-statements/558/136330/phone-call-with-president-zelensky-of-ukraine>

^{liiv} CIA Director Bill Burns and Sergei Naryshkin, head of Russia's Foreign Intelligence Service met in Ankara in November to discuss the consequences of using chemical weapons. This and numerous other press reports quote an unnamed National

Security Council official confirming this purpose and that Burns discussed possible prisoner exchanges. They were hosted by Türkiye's National Intelligence Organisation. BBC Russia Service, "Another warning to Russia: CIA Director Burns met with the head of the SVR Naryshkin in Turkey," 15 November 2022, <https://www.bbc.com/russian/news-63632061>

^{lv} The agreement on the resumption of Ukrainian grain exports was brokered by Türkiye and the United Nations in Istanbul, Türkiye. The initiative allowed for commercial food exports from three Ukrainian ports. The United Nations, "Black Sea Grain Initiative Joint Coordination Centre", <https://www.un.org/en/black-sea-grain-initiative>; On 11 July Erdogan called both Zelenskiy and Putin on the need for grain corridors in the Black Sea. President of the Republic of Türkiye, "Phone call with President Putin" and "Phone call with President Zelenskiy," 11 July 2022, <https://www.tccb.gov.tr/en/speeches-statements/558/138711/phone-call-with-president-vladimir-putin-of-russia>

^{lvi} On 29 October 2022, the Russian Embassy in Ankara retweeted an announcement from the Russian Ministry of Defense, "In view of the terrorist attack against the Black Sea Fleet, ships and civilian ships tasked with securing Kyiv's grain corridor, Russia has suspended its participation in agreements on the export of agricultural products from Ukrainian ports." Twitter, "Russian Embassy Türkiye," 29 October 2022, <https://twitter.com/RusEmbTürkiye/status/1586384189544275969>

^{lvii} Presidency of the Republic of Türkiye, "Phone call with President Putin of Russia," 1 November 2022, <https://www.tccb.gov.tr/en/speeches-statements/558/141469/phone-call-with-president-putin-of-russia>

^{lviii} Max Seddon, Ayla Jean Yackley, and Roman Olearchyk, "'One hand washes the other': grain deal shines light on Erdogan's ties to Putin," The Financial Times, 5 November 2022, <https://www.ft.com/content/45620571-23fc-4cef-a7b1-a6f9131d0539>

^{lix} Twitter, Mevlüt Çavuşoğlu, 17 November 2022, <https://twitter.com/MevlutCavusoglu/status/1593183242911649792>

^{lx} Alper Coşkun and Sinan Ülgen, "Political Change and Turkey's Foreign Policy," Carnegie Endowment for International Peace, 14 November 2022, 2, https://carnegieendowment.org/files/Coskun_Ulgen_Turkey_final.pdf

^{lxi} Coşkun and Ülgen 2022, 3.

^{lxii} Coşkun and Ülgen 2022, 3.

^{lxiii} Central Bank of the Republic of Türkiye, "Monthly and annual inflation rates announced by the Turkish Statistical Institute (TURKSTAT)" [in English], accessed 06 December 2022, <https://www.tcmb.gov.tr/wps/wcm/connect/EN/TCMB+EN/Main+Menu/Statistics/Inflation+Data/>

^{lxiv} Zanotti and Thomas August 2022, 5.

^{lxv} Andrew Wilks, "As Russia's war in Ukraine drags on Turkey role expands," Aljazeera, 15 November 2022, <https://www.aljazeera.com/news/2022/11/15/how-Turkey-positions-itself-during-the-war-in-ukraine>

^{lxvi} Mei@75, "Turkey's 2023 elections: what do the polls say?," 4 October 2022, <https://www.mei.edu/events/Turkeys-2023-elections-what-do-polls-say>

^{lxvii} YouTube, "The Heat: Türkiye foreign policy," 28 August 2022, <https://www.youtube.com/watch?v=gG8vsz46NsU>

^{lxviii} Miranda Alsop, "The Development of the Middle Corridor trade route as a Viable Alternative to the Northern Corridor," TextOre OSIX, 25 October 2022, <https://149803449.v2.pressablecdn.com/wp-content/uploads/Caspian-Trade-Report-102422.pdf>; and "Diversifying Europe's Energy Imports: Is the Caspian Region a Possibility?," TextOre OSIX, 7 December 2022, <https://149803449.v2.pressablecdn.com/wp-content/uploads/Transcaspian-Energy-Report.pdf>

^{lix} Twitter, "Doha Forum," 27 March 2022, https://twitter.com/DohaForum/status/1508012955480244224?ref_src=twsrc%5Etfw

^{lxx} The White House, "Readout of President Biden's meeting with President Recep Tayyip Erdogan of Turkey," 15 November 2022, <https://www.whitehouse.gov/briefing-room/statements-releases/2022/11/15/readout-of-president-bidens-meeting-with-president-recep-tayyip-erdogan-of-turkiye/>

^{lxxi} President of the Republic of Türkiye, "Phone call with President Putin," 17 March 2022, <https://www.tccb.gov.tr/en/speeches-statements/558/136127/phone-call-with-president-putin-of-russia;>

^{lxxii} "Readout of Secretary of Defense Lloyd J. Austin III's Phone Call With Turkish Minister of National Defense Hulusi Akar," U.S. Department of Defense official website, 30 November 2022, <https://www.defense.gov/News/Releases/Release/Article/3232626/readout-of-secretary-of-defense-lloyd-j-austin-iiis-phone-call-with-turkish-min/>

^{lxxiii} "There's such cultural affinity between the Azerbaijanis and the Anatolian Turks—they say, 'One nation, two states,'" [Rich] Outzen, the former State Department specialist, told me. 'Now they're starting to say, 'One nation, two states, one army.'" Witt 2022.

^{lxxiv} Media quoted Armenian Prime Minister Pashinian as saying that he vetoed two draft documents at a November 2022 CSTO summit in Yerevan, although he also concluded that the Summit discussions were "largely positive." Ruzanna Stepanian, "Pashinian 'Satisfied' With CSTO Summit In Yerevan," Azatutyun [in English], 24 November 2022, <https://www.azatutyun.am/a/32147003.html>

^{lxxv} Republic of Türkiye Ministry of Foreign Affairs, "Press release regarding the meeting of the Special Representatives for the Normalization Process between Türkiye and Armenia, Ambassador Serdar Kilic and Deputy Speaker of the Armenian

Parliament Ruben Rubinyan," 1 July 2022, https://www.mfa.gov.tr/no_-212_-turkiye-ve-ermenistan-normallesme-sureci-ozel-temsilcileri-nin---gorusmeleri-hk.en.mfa

^{lxxvi} President of the Republic of Türkiye, "Phone call with NATO Secretary General Stoltenberg," 21 May 2022, <https://www.tccb.gov.tr/en/speeches-statements/558/137997/phone-call-with-nato-secretary-general-stoltenberg->

^{lxxvii} NATO, "Trilateral Memorandum," 28 June 2022, https://www.nato.int/nato_static_fl2014/assets/pdf/2022/6/pdf/220628-trilat-memo.pdf

^{lxxviii} Robbie Gramer, "NATO's Nordic Expansion Stuck at Turkish Roadblock," Foreign Policy, November 4, 2022, <https://foreignpolicy.com/2022/11/04/nato-nordic-expansion-turkey-sweden-finland/>

^{lxxix} "Press conference with NATO Secretary General Jens Stoltenberg and the Minister of Foreign Affairs of Türkiye, Mevlüt Çavuşoğlu," NATO official website [in English], 03 November 2022, https://www.nato.int/cps/en/natohq/opinions_208413.htm

^{lxxx} Şaban Kardaş, "The War in Ukraine and Turkey's Cautious Counter-Balancing Against Russia," German Marshall Fund, 03 March 2022, <https://www.gmfus.org/news/war-ukraine-and-Turkey's-cautious-counter-balancing-against-russia>

^{lxxxii} Marc Pierini and Sinan Ülgen, "Two Turkey Experts on Why Erdogan is Rejecting NATO Expansion," Carnegie Europe, 19 May 2022, <https://carnegieeurope.eu/2022/05/19/two-Türkiye-experts-on-why-erdo-is-rejecting-nato-expansion-pub-87159>



textore.net
(571) 321-2013
inquiries@textore.net
