



SETA SECURITY RADAR

TURKEY'S GEOPOLITICAL LANDSCAPE IN 2020

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SETA

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FOREWORD

Geographically positioned at the intersection of several disputes and conflicts, Turkey has always been a major player in the international security debate. From terrorism and energy crises to civil wars and maritime disagreements and from external intervention to hyper-localized and regionalized armed and military conflicts, Turkey's geopolitical landscape encompasses various persistent hotspots. These security challenges have only intensified in recent years due to the increased uncertainty and geopolitical risks, particularly in the Eastern Mediterranean and the Middle East. More and more countries are now eager to use military means to resolve rivalries, differences, or even disputes which has escalated the tensions, paved the way for diplomatic deadlocks, triggered proxy wars, and exacerbated the ongoing conflicts. Within this turmoil, the military and strategic actions that are available to Turkey in order to minimize regional threats constitute a significant question. Turkey faces the fundamental challenge of formulating a robust foreign and security strategy that are adaptable to threats and opportunities.

The *SETA Security Radar 2020* aims to understand Turkey's critical national security issues by elaborating on their underlying causes and future prospects. In light of this, it discusses a selective range of important issues from the conflict in Syria to the dispute in the Eastern Mediterranean and from the fight against the PKK to the

efforts to build an indigenous defense industry. The report also draws attention to Turkey's fluctuating bilateral relations with the United States and Russia. The course of these relations continued to influence significantly Turkey's security landscape and they are likely to affect considerably the Turkish security deliberations in the coming year. Our team concluded that a multitude of political, military, and economic considerations influence Turkey's security and defense policies and that these are likely to persist in the coming term.

The *SETA Security Radar* hopes to provide a timely assessment of the major hotspots which are likely to affect Turkey's foreign policy and national security. By revealing the main determinants of these hotspots, the report also proposes predictions for the future course of Turkey's security policies. The *SETA Security Radar* aspires to promote an understanding and awareness among the decision-making circles and those who are interested in major security issues in Turkey's surrounding geography. By doing so, the report also intends to fill the gap in policy-relevant analysis which in general suffers from the prevalence of inadequate daily media reports and observations. We believe that our report will help establish a bridge between decision-makers and the security studies community, which in turn may lead to the discussion of more relevant and sound security strategies to address the sophisticated challenges of our region today.

Professor Burhanettin Duran
SETA General Coordinator

INTRODUCTION

As Turkish Parliament's recent approval of the motion that allows President to deploy Turkish troops abroad as well as the U.S.' targeted killing of the influential commander of the Quds Force of Iran, Qassem Soleimani indicate, 2020 will be a tough year in the Middle East where we may face with escalation of tensions in the Eastern Mediterranean, expansion of proxy wars throughout the Middle East, and even a direct armed clashes between Iran and the U.S. Previous year, Turkey encountered a complex security environment that posed multidimensional challenges ranging from conventional risks to asymmetric threats in urban environments and from diplomatic unilateralism to counterbalancing coalitions. In this regard, as the SETA Security team, we concluded that an accurate forecast of short-term future security threats should lie at the heart of our agenda for 2020. Hence, we compiled the *SETA Security Radar 2020* in line with the critical developments that took place in Turkey and its surroundings in 2019.

If we were to outline the *SETA Security Radar 2020* succinctly, it pertains to the following topics: Turkey's role in Syria, particularly regarding another Turkish military operation against the YPG, Turkey's commitments to the Syrian future in the context of the constitutional committee, and the Syrian refugees; Turkey's counterterrorism strategy against the PKK with a focus on operational and intelligence

aspects; Turkey's military activism regarding Turkey's overseas military commitments and the consolidation of its presence abroad; Turkey's defense industry developments with a focus on efforts to achieve defense autonomy and its very strategic implications; Turkish national interests in the Eastern Mediterranean Sea in the context of increasingly contested energy issues and the strategic implication of the Turkey-Libya agreement with a possible deployment of Turkish Army personnel to Libya; and Turkey's bilateral relations with the United States and Russia which have always constituted a delicate balance in Turkey's foreign and security considerations. As the scope of our research yields outcomes along these lines, we intentionally limited our discussion in this work to the above topics.

In formulating our forecasts, we implemented a selective three-step method based on comprehensive research involving sources from the media, think-tanks, multiple governments, and academic channels. In order to provide a sound and relevant analysis on the selected topics, we preferred to divide each one into three parts consisting of a summary of 2019, an elaboration of the dynamics in 2020, and an account of the prospects for the year under consideration. We seek to give a very broad geopolitical and strategic picture concerning Turkey's security landscape and the country's possible approaches to conducting foreign and security policies vis-à-vis the most crucial foreign and security issues in Turkey's surroundings.

Initially, to determine the most critical developments of 2019, we conducted a comprehensive, open-source examination and then summarized the most prominent topics. Following this step, based on the identified developments of 2019, we conceptualized specific dynamics that would prevail in 2020. Finally, in light of the dynamics put forth, we analyzed and projected our expectations for the year.

It is important to note that short-term security projections can easily be affected by game-changing decisions and unexpected events, and that several times we faced such developments in our volatile region. With this work, aimed at informing our audience, we do not claim to have mapped out Turkey's entire 2020 security landscape. As the SETA Security team, we hope to provide an accessible and timely evaluation of a geopolitical landscape for Turkish decision-makers and those who are interested in the major security issues faced by Turkey. We also hope to fill the gap in policy-relevant analysis in Turkish security studies by providing an assessment of what we believe awaits Turkey in the coming year.

TURKEY AND THE SYRIAN CONFLICT: MULTIPLE FRONTS

SUMMARY OF 2019

- Turkey and Russia agreed on freezing the conflict during the summit in Ankara.
- A joint military operation was conducted by the Turkish Armed Forces and the Syrian National Army against the PKK/YPG in northeast Syria.
- The Syrian Constitutional Committee has begun its work in Geneva.

Throughout 2019, there were significant developments in Syria: the Assad regime seized opposition-held parts of northern Hama as a result of clashes in Idlib; negotiations between Ankara and Moscow continued; DAESH's territorial defeat was declared; the establishment of the Constitutional Committee for a new constitution was announced; and the joint Syrian-Turkish military operation was conducted. All of these were developments of very high significance for the region.

Since the beginning of the year, the regime expanded its area of control in northern Hama with massive Russian backing and air support.¹ During the offensive, the

1. "Assad's Forces Intensify Shelling of Rural Idlib and Hama", Enabbaladi, February 4, 2019, <https://english.enabbaladi.net/archives/2019/02/assads-forces-intensify-shelling-of-rural-idlib-and-hama>

regime targeted several critical infrastructures and civilian compounds² forcing at least 200,000 people to flee towards the Turkish border.³ Ankara and Moscow remained in constant contact about the security of Turkish observation outposts in Idlib and the de-escalation zone.⁴ Turkey and Russia agreed to freeze the conflict during the summit in Ankara.⁵

In another area of concern for Turkey, the Turkish Armed Forces and the Syrian National Army launched a joint military operation against the YPG between Tal Abyad and Rasulayn in order to establish a safe zone to facilitate the voluntary return of Syrian refugees to Syria and to eliminate the terror threat emanating from northeastern Syria.⁶ As a counterstep, the YPG signed a deal with the Assad regime allowing the latter to enter the border areas with Turkey to prevent a further incursion by the joint Syrian-Turkish operation.⁷

After a summit between Turkey and the U.S. in Ankara, both sides agreed upon the withdrawal of YPG elements from the safe zone area between Tal Abyad and Rasulayn.⁸ As the regime and Russia entered the border areas with Turkey, Tel Rifaat and Manbij, Moscow and Ankara set down a framework in which the YPG had to withdraw from Tal Rifaat, Manbij, and 32 km from the Turkish border, and both countries agreed on joint patrols.⁹

On the international level, the political transition process of Syria, with support from Turkey, Iran, and Russia, gained speed. The Astana format managed to agree on the delegation list for the constitutional committee.¹⁰ Based upon this achievement, the first round of the meetings of the Syrian Constitutional Committee was concluded in Geneva, on November 8 under the auspices of the UN. All parties agreed on the rules of procedure, code of conduct, and 12 principles were approved,

2. "Idlib 'Double Tap' Air Strike Russia Says Never Was", BBC, August 31, 2019.

3. "200,000 Displaced Syrians Flee towards Turkey", EURACTIVE, May 24, 2019, <https://www.euractiv.com/section/global-europe/news/200000-displaced-syrians-flee-towards-turkey>

4. "Syria War: Russia and Turkey to Create Buffer Zone in Idlib", BBC, September 17, 2019.

5. "Ankara Summit on Syria: 'A Win for Moscow and al-Assad'", Aljazeera, September 17, 2019.

6. "Erdogan Tweets Operation 'Peace Spring' Has Started", Newser, October 9, 2019, <https://www.newser.com/story/281506/game-on-erdogan-says-that-syria-offensive-has-begun.html>

7. "What Syrian President Bashar Assad Stands to Gain from Conflict in Northeastern Region", NPR, October 15, 2019, <https://www.npr.org/2019/10/15/770417176/what-syrian-president-bashar-assad-stands-to-gain-from-conflict-in-northeastern->

8. "US Says Turkey Agrees to a Ceasefire in Syria", CNN, October 17, 2019.

9. "Turkey, Russia Agree on Syrian Kurdish YPG Withdrawal, Joint Patrols-Erdogan", Reuters, October 22, 2019.

10. "Russia's Efforts to Expand the Astana Process in Syria", Middle East Institute, October 7, 2019, <https://www.mei.edu/publications/russias-efforts-expand-astana-process-syria>

which are regarded as the basis of the new constitution that the Syrian Negotiation Commission has worked on in coordination with the UN.¹¹

DYNAMICS OF TURKEY'S SYRIA POLICY

The PKK/YPG Threat and the Safe Zone

After Turkey and the Syrian opposition postponed their military operation¹² against the YPG in northeast Syria and Manbij for almost a year, the U.S. president again ordered U.S. troops to withdraw from the area of operation after a phone call with the Turkish president.¹³ Following this, the joint Syrian-Turkish military operation began and the dynamics in Syria were reshuffled. Since then, a 145-kilometer-long and 30-kilometer-deep safe zone was established;¹⁴ the U.S. forces and French troops withdrew to the oil fields in Syria securing an important revenue for the YPG;¹⁵ the regime and Russian soldiers entered Manbij and northeast Syria after a deal with the YPG;¹⁶ and Ankara signed two separate deals with Washington¹⁷ and Moscow¹⁸ which foresee the withdrawal of the YPG. However, since then, the Russian side has not delivered on its promise of a YPG withdrawal¹⁹ and spontaneous clashes between the Syrian National Army and the YPG-regime alliance continue.²⁰ While Turkey could not achieve the full extent of the planned safe zone territory, the Assad regime faces a shortage in its capacities and tries to find a balance in its relation with the YPG as the latter continues to cooperate with the U.S., insists on maximalist demands, and denies the regime access to Syria's lucrative oil fields.²¹

11. "As Assad Gains Ground, New Syria Talks Offer Little Hope of Peace", *Foreign Policy*, November 12, 2019, <https://foreignpolicy.com/2019/11/12/as-assad-gains-ground-new-syria-talks-offer-little-hope-of-peace>

12. "Turkey Postpones Syria Military Operation against YPG Pending US Withdrawal", *The Defence Post*, December 21, 2018, <https://thedefensepost.com/2018/12/21/turkey-delays-military-operation-syria-ypg>

13. "White House Announces Troop Withdrawal in Syria", *ABC NEWS*, October 7, 2019, <https://abcnews.go.com/WNT/video/trump-orders-us-troops-withdraw-northern-syria-66121084>

14. "Bakan Akar: YPG'ye Verilen Her Bir Silah PKK Eliyle Bize Karşı Kullanılıyor", *Türkiye Cumhuriyeti Milli Savunma Bakanlığı*, October 21, 2019, <https://msb.gov.tr/SlaytHaber/21102019-64711>

15. "Exclusive: U.S. Has Plan to Send Tanks and Troops to 'Secure' Syria Oil Fields Amid Withdrawal", *Newsweek*, October 23, 2019.

16. "Syrian Government Forces Set to Enter Kobani and Manbij in SDF Deal", *The Defense Post*, October 13, 2019, <https://thedefensepost.com/2019/10/13/syria-government-russia-kobani-manbij-sdf>

17. "US Says Turkey Agrees to a Ceasefire in Syria", *CNN*, October 17, 2019.

18. "Turkey, Russia Agree on Syrian Kurdish YPG Withdrawal, Joint Patrols -Erdogan", *Reuters*, October 22, 2019.

19. "Turkey Says Kurdish YPG Has Not Fully Withdrawn from Syria Border", *Aljazeera*, October 28, 2019.

20. "132 SNA Martyred Fighting YPG in Syria Anti-Terror Op", *AA*, November 01, 2019.

21. "The Deal between the Syrian Regime and the YPG Is Coming apart at the Seams", *TRT World*, November 1, 2019, <https://www.trtworld.com/opinion/the-deal-between-the-syrian-regime-and-the-ypg-is-coming-apart-at-the-seams-31027>

FIGURE 1: OPERATION PEACE SPRING (OPS)



Source: Suriye Gündemi

The Feud over Idlib

Even though the presidents of Russia and Turkey have managed to freeze the dispute over Idlib,²² the situation in Idlib remains a ticking bomb. While the presence of radical groups in Idlib is an argument used by Russia and Iran against Turkey to open their way for an operation, Turkey fears a new migration wave of 2 million Syrian refugees²³ and used its twelve observation points in Idlib to deter the regime from pushing forward. The latest regime operation and the encirclement of the Turkish observation point at Morek, however, proved how vulnerable the Turkish military presence is in Idlib.²⁴

Constitutional Committee

The Astana format managed to form the constitutional committee. Three delegations of 50 delegates were formed, one for the Assad regime, one for the Syrian opposition, and one for the representatives of civil society.²⁵ Since the establishment of the committee, the sides managed to agree on the initial terms and arrangements of the constitutional committee.²⁶ The constitutional committee marks the first real

22. "Ankara Summit on Syria: 'A Win for Moscow and al-Assad'", Aljazeera, September 17, 2019.

23. "Syria War: Turkey Warns Europe of New Migrant Wave", BBC, September 5, 2019.

24. "Russia May Turn Idlib into a Tit-For-Tat Game", The New Turkey, November 22, 2019, <https://thenewturkey.org/russia-may-want-to-turn-idlib-into-tit-for-tat-game>

25. "UN Envoy: First Syria Talks in over a Year Better Than Expected", Aljazeera, November 8, 2019.

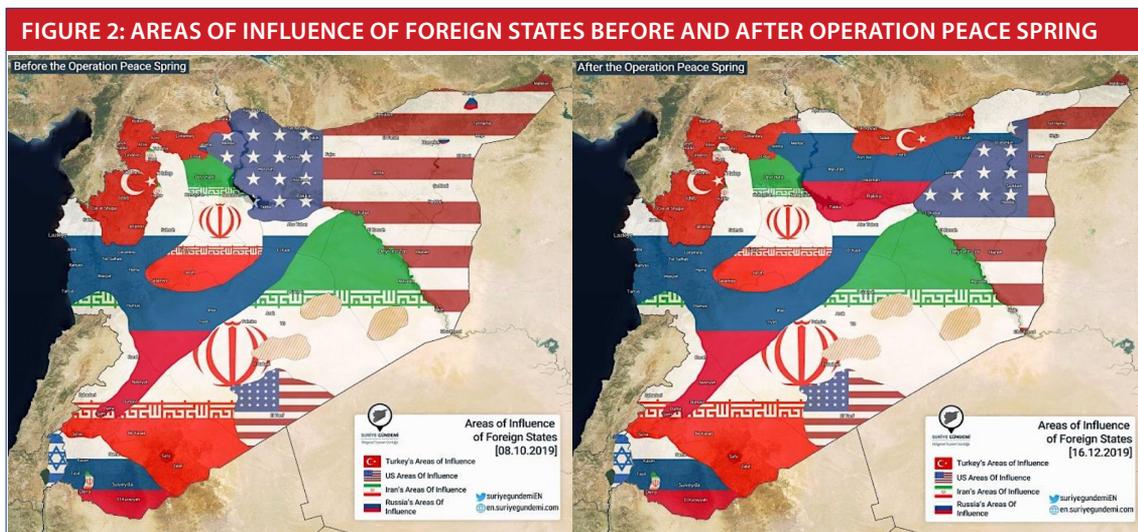
26. "Syria Talks: Possible Path toward Peace, or Another Dead End", AP News, October 31, 2019.

attempt to resolve the Syrian conflict but still faces many challenges. Putting the internal obstacles aside, the question if and how the constitution will be approved by the Syrian people in elections and how the constitution will be implemented in the transition period remains unanswered.

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2020?

A Second Military Operation in Northeast Syria

After the joint Turkish-Syrian military operation in northeast Syria, the dynamics of the region have changed massively and many new options, challenges, and opportunities have evolved. On the one hand, Turkey needs to convince the European states that it is in their common interest to fund reconstruction projects in northeast Syria so as to accelerate the return of Syrian refugees to Syria. Meanwhile, however, Turkey could not completely achieve its goal: the current safe zone covers only one third of the planned area and neither the U.S. nor Russia seem to be willing and capable of answering Turkey's demands for a full withdrawal of the YPG. On the other hand, the YPG, the Assad regime, Russia, and the U.S. need to find a balance and a rapprochement for the new situation in which the U.S. continues to deny crucial resources to the regime and prevents a full surrender of the YPG to Russia. Depending on how this dynamic evolves further, the possibility of a second limited joint Turkish-Syrian military operation in northeast Syria cannot be denied. However, Turkey will continue to need to balance between pursuing its national interest to ensure its national security and managing the criticism of western states who see the YPG as a partner.



Source: Suriye Gündemi

Idlib as a Quagmire

The situation in Idlib has the potential to become a long-standing unsolved dispute due to the deadlock created by Hayat Tahrir al-Sham (HTS) by taking 3.3 million civilians as de facto hostages. The Russian side may continue to use the situation in Idlib as leverage and pressure against Turkey in order to force Ankara to make concessions. The possibility of the Syrian opposition cracking down on the radical groups in Idlib seems very unlikely since the HTS's operation on New Year's day. It is likely that the regime, Iran, and Russia will continue their attempts to bid for Idlib piece by piece using a scorched-earth strategy and forcing thousands of civilians to the Turkish border; this will be pursued gradually to reduce international and Turkish anger. As the armed groups in Idlib are seemingly incapable of stopping the attacking side, the only way out of this deadlock seems to be a security belt at the Turkish border or to risk a direct confrontation between the Syrian National Army and the HTS by accelerating the reinforcements of the former into Idlib. Nevertheless, it is likely that Turkey will try as much as possible to win time and will seek a further diplomatic freeze to the dispute by mutual agreements between presidents.

The Political Transition Process

The future of the constitutional committee and the broader political transition process will depend on the Turkish-Russian bilateral relations and the overall escalation on the ground. If Moscow and Ankara manage to avoid major disputes and conflicts, a breakthrough in the constitutional committee might be possible. However, the future of the process also depends on the attitude of the Assad regime and the amount of pressure Russia will put on the latter. Within the general framework set by Turkey and Russia, the western countries and Iran have the ability to either accelerate or slow down the process.

TURKEY'S COUNTERTERRORISM STRATEGY: MULTIPLE PRIORITIES

SUMMARY OF 2019

- Throughout 2019, Turkey conducted internal counterterrorism operations named Kıran²⁷ and the cross-border military operations Claw-1/2/3 and Operation Peace Spring to contain the PKK threat, to minimize its armed capacity, and ultimately to limit the PKK's cross-border terrorist activities and mobilization. The series of operations called Decisiveness Operation obviously played a strategic role in containing the PKK threat in the urban and rural internal security landscape.²⁸
- During 2019, the Turkish Armed Forces along with internal security forces conducted approximately 109,000 domestic and cross-border counterterrorism operations against the PKK.²⁹
- Forty-seven high-level terrorists were killed by Turkish security forces; all together the former were responsible for carrying out 72 terrorist attacks.
- Between January and December 2019, the PKK carried out 28 attacks on natural resources/forests and used low-tech mini unmanned aerial vehicles to pursue more effective terrorist attacks.³⁰

27. "Terör Örgütüne Kıran Operasyonu Darbesi", Türkiye Cumhuriyeti İçişleri Bakanlığı, August 19, 2019, <https://www.icisleri.gov.tr/teror-orgutune-kiran-operasyonu-darbesi>

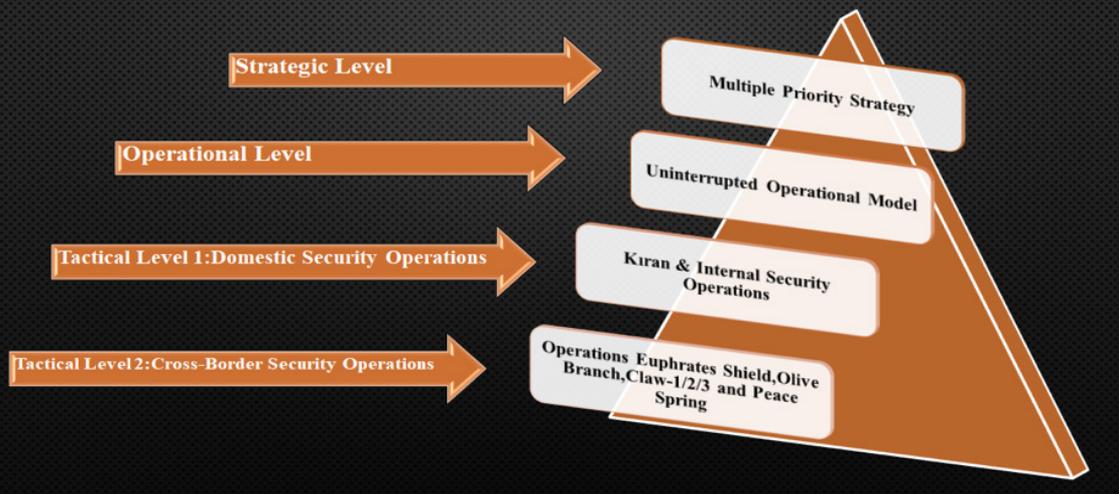
28. "Actual Situation at the Operation Decisiveness in Iraq", Suriye Gündemi, June 14, 2018, <http://en.suriyegundemi.com/2018/06/14/actual-situation-at-the-operation-decisiveness-in-iraq/>

29. "4 Mevsim 12 Ay Operasyundayız", *Sabah*, November 14, 2019.

30. "Terrorism Analysis Platform", SETA & STM, <https://tap.stm.com.tr>

Throughout 2019, the ability of the PKK to enforce terrorist attacks was impeded as a result of Turkey's domestic and cross-border counterterrorism (CT) operations. As a reaction against Turkey's multiple CT operations on various fronts including Syria and northern Iraq, the PKK had to choose a hit-and-run tactic in order to minimize the effectiveness of the security forces' operational tempo and tactical superiority. The main purpose of the PKK's hit-and-run tactic is not to seize control of territory in Turkey and northern Iraq, but to inflict damage on the targeted military positions and immediately exit the area in order to avoid the Turkish security forces' retaliation. This attack type also aims to proclaim that the PKK is able to sustain its operational capacity, to target military personnel, and to recruit more fighters. During 2019, it became obvious that the PKK was reconsidering its *modus operandi* particularly in rural areas under the restrictive security landscape created by Turkey's multiple operations.³¹ In 2019, Turkey maintained its CT strategies against the PKK's threat. Rather than prioritizing one of the tactics chosen from its CT tool kits, Turkey applied multiple tactics on multiple fronts against the PKK.

FIGURE 3: LAYERS OF TURKEY'S COUNTERTERRORISM STRATEGY IN 2019



Source: Suriye Gündemi

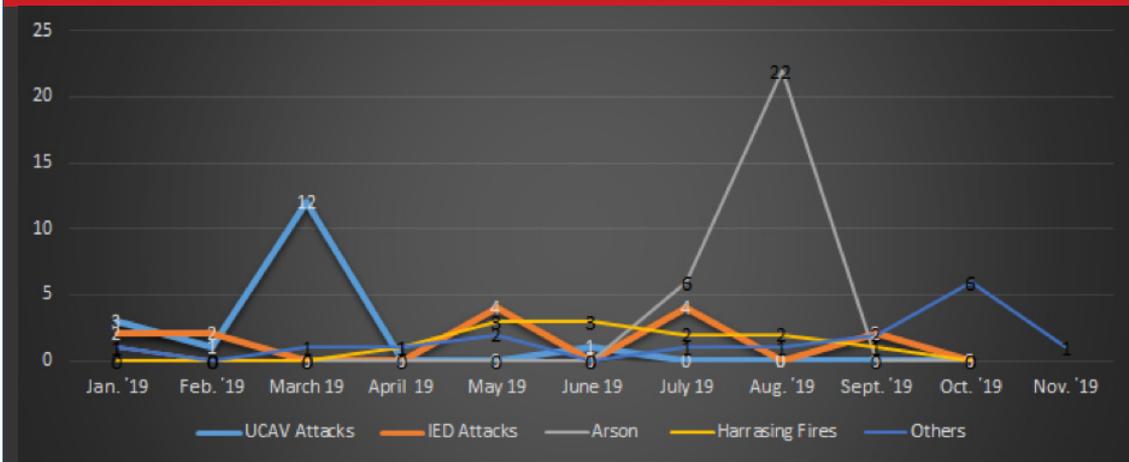
THE DYNAMICS OF TURKEY'S COUNTERTERRORISM STRATEGY

It is obvious that the PKK has limited capacity to coordinate an active fight against Turkey. The main driving factor behind the failure of the PKK's limitation is the in-

31. "Anti-Terror Op in Syria Respects Int'l Laws: Turkey", AA, December 1, 2019.

fluence of Turkey's CT strategy and operational tempo in both rural and urban areas. In terms of the geographical scope, Turkey's CT operation has covered rural and urban areas with the aim to prevent terrorist mobilization and directly target the PKK's presence in Turkey and northern Iraq. An intense operational tempo was obviously the main characteristic feature of Turkey's CT operation aimed at preventing the PKK from having an offensive operational advantage against military posts in the border areas. As a result of Turkey's pro-active CT operation strategy, the PKK's aim was to mobilize its limited fighters in a very restrictive security environment in which the Turkish military and security forces were operational throughout. Turkey's intense operational tempo and technological superiority pushed the PKK into conducting limited terrorist attacks in terms of geographical scope and, in specific, attacks were mostly limited to arson, ambushes, and harassment fires against the security forces. The PKK attacked security forces, usually with tactical and operational elements, with handmade explosives and harassment fires, and directed the same types of attacks against civilians. In addition, the PKK tried to apply hit-and-run tactics by conducting attacks using mini and small UCAVs 17 times, IED 12 times, and by carrying out harassment attacks 11 times. In terms of the new dynamics of terrorism in Turkey, the PKK organized 28 attacks against natural resources and forests between January and August.

FIGURE 4: THE PKK'S MONTHLY ATTACKS IN 2019



Source: SETA Terrorism Analysis Platform/National Database of Terrorism Incidents & Open Sources

Turkey's security operations increased 150 percent in 2019 compared to the previous year. Turkey conducted over 109,000 (including domestic security operations and cross-border military operations) against the PKK, while over 700 YPG terrorists were neutralized in Operation Peace Spring.³² In addition, Turkey carried both

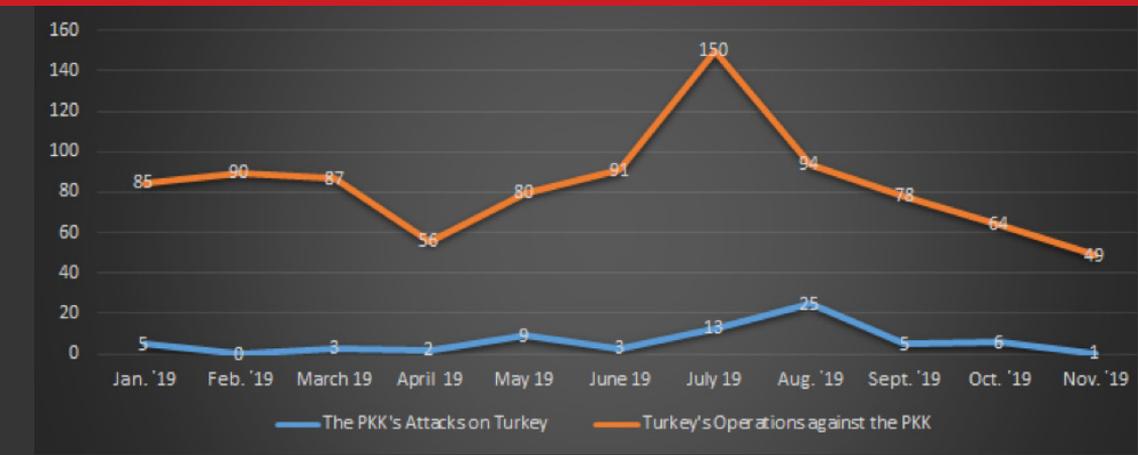
32. "MSB: Barış Pınarı Harekatı'nda 702 Terörist Etkisiz Hale Getirildi", A Haber, October 17, 2019.

FIGURE 5: THE MAP SHOWING THE PKK'S ARSON ATTACKS AGAINST NATURAL RESOURCES AND FORESTS IN 2019



domestic (Kıran-1,-2,-3,-4,-5,-6,-7)³³ and cross-border military operations (Claw-1/2/3)³⁴ in northern Iraq particularly in rural areas; and in Avasin/Basyan, Gara, Khakurk where the PKK is located. With these operations the Turkish security forces aimed to target PKK leadership cadre, shelters, camps, and cells. As can be seen in Figure 6, as of January 2019, the PKK was able to carry out only 72 attacks while 733 counterterrorism operations were conducted by the Turkish Armed Forces.

FIGURE 6: TURKEY'S OPERATIONS AND PKK ATTACKS BY MONTH IN 2019



Source: SETA Terrorism Analysis Platform/National Database of Terrorism Incidents

33. "Kıran-7 Operasyonu Başladı", Türkiye Cumhuriyeti İçişleri Bakanlığı, November 23, 2019, <https://www.icisleri.gov.tr/kiran-7-operasyonu-basladi>

34. Murat Aslan, "Türkiye'nin Terörizmle Mücadelesi Pençe Harekatı", SETA, July 2019, <https://setav.org/assets/uploads/2019/07/A289Tr.pdf>

Due to Turkey's intense CT operations in urban and rural places, the number of fighters who joined the PKK in 2019 dramatically declined to only 104. Thus, it will drive the PKK to launch attacks that would cause much more damage although it has declining human capacity. Turkey also targeted high-level terrorists from the leadership cadre to undermine the PKK's organizational capability. The strategy of *targeted killing* of terrorists also weakened the ability of the PKK to act effectively and freely in implementing terrorist attacks against security forces and permanent military posts particularly in rural areas. Drone strikes and electronic intelligence, which has been collected on a daily base in 2019, provided Turkish intelligence units with an intelligence superiority and surprise drone strike ability against the terrorists on the ground -this ultimately undermined the PKK's mobilizations. In this respect, 47 high-level terrorists were reportedly killed by drone strikes in 2019.³⁵

The PKK's Recruitment Problem

Turkey's comprehensive full-scale unlimited CT operations dramatically effected the PKK's ability to reorganize itself and caused tactical and strategic difficulties for the organization. Turkey's strategy concerning the deterritorialization of the YPG in Syria also undermined the PKK's tactical maneuverability capacity especially in Turkey's domestic environment. The more restrictive security environment created by Turkey resulted in a very limited physical environment for the PKK's armed mobilization. More importantly, non-military measures taken by the Turkish government and civil society mobilization as a way of public resistance against the PKK limited the recruitment mobility of the organization which ultimately resulted in the declining numbers of fighters. In 2019, the PKK recruited only 104 new members, which means that the PKK is left with approximately 600 terrorists.³⁶

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2020?

Turkey's Intense CT Operations

The presence and limited mobilization of the PKK in Turkey, Syria, and northern Iraq will remain the lynchpin of Turkey's multiple-threat perception concerning the terrorism threat. Three regions that Turkey's CT operations will continue. The first geographical scope will be in Syria in which the YPG will probably maintain its territorial presence outside the Tel Abyad-Rasulayn line. Although Turkey and

35. "TSK ve MİT Erbil Suikastının Planlayıcılarını Vurdu", NTV, July 25, 2019.

36. "4 Mevsim 12 Ay Operasyondayız", *Sabah*, December 14, 2019.

Russia have agreed to the withdrawal of the YPG elements from Turkey's targeted safe-zone³⁷ regions, it seems that 2020 will be challenging for Turkey's CT efforts in Syria to contain the YPG threat. The second geographical zone, where Turkey will extensively conduct CT operations against the PKK, is northern Iraq. Turkey's two main objectives in 2020 are limiting the PKK's tactical and operational maneuverability, and maintaining and expanding Turkey's control zone in the region. Thus, Turkey will be able to secure its southern borders and put an end to the terrorists' mobilization. The last geographical scope of Turkey's CT operations will be the eastern and southeastern rural areas in Turkey in which Turkish security forces aim to fully delimit the PKK presence and mobilization. Turkey will most likely continue its multiple CT operations to maintain its military decisiveness.³⁸

PKK's Potential Attack Types

The year 2020 will likely be a year of tactical retrenchment for the PKK. The PKK will most likely continue to conduct hit-and-run attacks until it regains the attack initiative and radicalizes "potential terrorists." It should be expected that the PKK will mainly attempt three types of terrorist attacks against Turkey in three different geographical regions:

- Armed drone attacks targeting Turkish military facilities especially in northern Iraq.
- IED and harassing fire attacks targeting security personnel on the ground in rural areas in Turkey and northern Iraq.
- Ambushes, IEDs, car bombs, cross-border fires, and ATGM attacks targeting security personnel on the ground in Syria.

Radicalization and Recruitment

It should be expected that the PKK will face multiple difficulties regarding its manpower. Given the lower expectations concerning individual survival and life expectancy among potential recruits as a result of the intense CT operational tempo and the very restrictive security environment, the PKK will most likely recruit its Syrian affiliates' personnel. Under the condition of Turkey's potential military operation in Syria the YPG's would likely provide limited amount of its man power. More importantly, with the lower expectation concerning the recruitment of Turkish-origin men and women, the PKK will likely head to the Yezidi recruit pool in order to maintained

37. "Türkiye'nin Güvenli Bölge Planı", TRT Haber, October 7, 2019.

38. "Kasım Ayında 131 Terörist Etkisiz Hale Getirildi", CNN Türk, December 4, 2019.

organizational survival in Iraq. It should be expected that the Turkish military and security personnel will be targeted by the PKK's proxies, namely the Kurdistan Freedom Falcons (TAK) in Turkey, Wrath of Olives in Syria - particularly in the Afrin region -,³⁹ and the People's Defence Forces (HPG) in Iraq. In this sense, it can be safely argued that PKK and YPG sympathizers who are already ideologically radicalized in the cities will likely try to gain the ability to conduct terrorist attacks by grouping around various "revenge" formations. The PKK will also most likely disseminate its traditional and digital propaganda asking youths to join the PKK in Iraq.⁴⁰

39. Alexander McKeever, "Wrath of the Olives: Tracking the Afrin Insurgency through Social Media", *Bellingcat*, March 1, 2019, <https://www.bellingcat.com/news/mena/2019/03/01/wrath-of-the-olives-tracking-the-afrin-in-surgency-through-social-media>

40. "Karasu: En Meşru Mücadele Kürt Gençlerinin Dağa Çıkmasıdır!", *ANFNEWS*, September 10, 2019 <https://anftrkce.net/kurdistan/karasu-en-mesru-muecadele-kuert-genclerinin-daga-cikmasidir-130125>

TURKEY'S MILITARY ACTIVISM

SUMMARY OF 2019

- The Turkish Naval Forces carried out the largest naval exercises of the past 20 years, named Blue Homeland, between February 27 and March 8 in the Aegean, Eastern Mediterranean, and Black Seas.⁴¹
- In May, the Turkish Armed Forces (TAF) launched a cross-border land operation called Operation Claw against the PKK targets in the Hakurk region of Iraq in the aftermath of artillery shells and air strikes. The operation continued with the launch of Operation Claw 2 on July 13, 2019, and Operation Claw 3 on August 24, 2019.⁴²
- In November, it was announced that the construction of a new Turkish military base named Khalid bin Walid was completed in Qatar.⁴³

41. "Cumhuriyet Tarihinin En Büyük Deniz Tatbikatı Başladı", Anadolu Agency, February 27, 2019.

42. "Turkish Military Strikes against Kurdish Militants in Iraq", Reuters, May 28, 2019; "Turkey Launches Counter-terror Operation Claw-2 in N. Iraq", Anadolu Agency, July 13, 2019; "Operation Claw 3 Launched in Northern Iraq: Turkey", Anadolu Agency, August 24, 2019.

43. "Erdogan: Turkey-Qatar Military Base Serves Regional 'Stability'", Aljazeera, November 25, 2019.

In line with Turkey's military activism, the transformation of Turkey's naval power projection capabilities was sustained in 2019. During the Blue Homeland naval drill in addition to the naval assets, helicopters, planes, and special forces teams of the Turkish Navy, attack and transport helicopters from the Turkish Land Forces, fighter and early warning planes from the Turkish Air Force, and boats and helicopters from the Turkish Coast Guard also joined in the exercise, providing an outlook of the joint operation capacities of these forces.⁴⁴ It was the first time in the history of the modern Turkish republic that the Turkish Naval Forces tested their warfare capacity in the Black Sea, Aegean Sea, and Mediterranean Sea at the same time.

Other aspects of Turkey's military activism have been the shift in Turkey's CT efforts and forward military presence. First, Operation Claw marked the success of Turkey's strategic targeting of terrorist leaders and innovative efforts in the fight against terrorism. A couple of successful air campaigns were conducted by the joint efforts of the MIT (National Intelligence Organization) and the TAF in order to eliminate the leadership cadre of the terrorist organization. Moreover, at the onset of Operation Claw, a footage was released showing that the Bora short-range ballistic missile (SRBM) became "combat proven."⁴⁵ Secondly, since the Saudi-led blockade on Qatar in June 2017, the military partnership between Turkey and Qatar has been strengthened through several official visits, expanding defense industry bonds, and joint training and military exercises. Furthermore, following the bilateral meeting of President Erdogan and Sheikh Al-Thani in November, seven agreements including the areas of economy, urbanization, trade, industry, technology, and standardization, were signed between the parties.⁴⁶

DYNAMICS OF TURKEY'S MILITARY ACTIVISM

Turkey's Enhancing Naval Power Projection Capabilities

The Blue Homeland naval drill provided an opportunity to examine the integration of modern drones and autonomous unmanned vehicles into the present capabilities. The operative competence of Turkey's investments in C3I (Command, Control, Communication and Intelligence) systems was evaluated, as well. Moreover, an indigenously developed computer-based naval war gaming program was used to

44. "What Does the Exercise Mavi Vatan Mean?", Bosphorus Naval News, February 27, 2019, <https://turkishnavy.net/2019/02/27/what-does-the-exercise-mavi-vatan-mean>

45. "Turkey Fires Bora Ballistic Missile on PKK in Iraq", Missile Threat, June 3, 2019, <https://missilethreat.csis.org/turkey-fires-bora-ballistic-missile-on-pkk-in-iraq/>

46. "Turkey, Qatar Ink 7 Agreements to Boost Ties", Anadolu Agency, November 25, 2019.

illustrate the decision-making process in real time war scenes. Also, with port visits to countries ranging from Bulgaria, Romania, Ukraine, Russia, Georgia, and the Turkish Republic of North Cyprus, C2 (Command and Control) and the logistical support qualifications of the newly established Naval Warfare Center were affirmed.⁴⁷ It is obvious that the Blue Homeland was not only a military exercise to show the deterrence capacity, strength, readiness, and military mobilization of Turkey's naval power, but also to underline three characteristic features of Turkey's geopolitical vision of its maritime strategy. First, as a concept Blue Homeland is constructed as an integral part of the national security strategy, which has territorial integrity at its center. Therefore, Blue Homeland is a complementary aspect of Turkey's power projection for the near and far abroad. Second, Blue Homeland highlights Turkey's active foreign and security policy vision in response to the geopolitical competition in its surrounding geopolitical landscape. Third, it provides mid- and long-term projection concerning the question of how the Turkish defense industry should reorganize itself in terms of the competitive geopolitical environment.

Turkey's Persistent CT Efforts

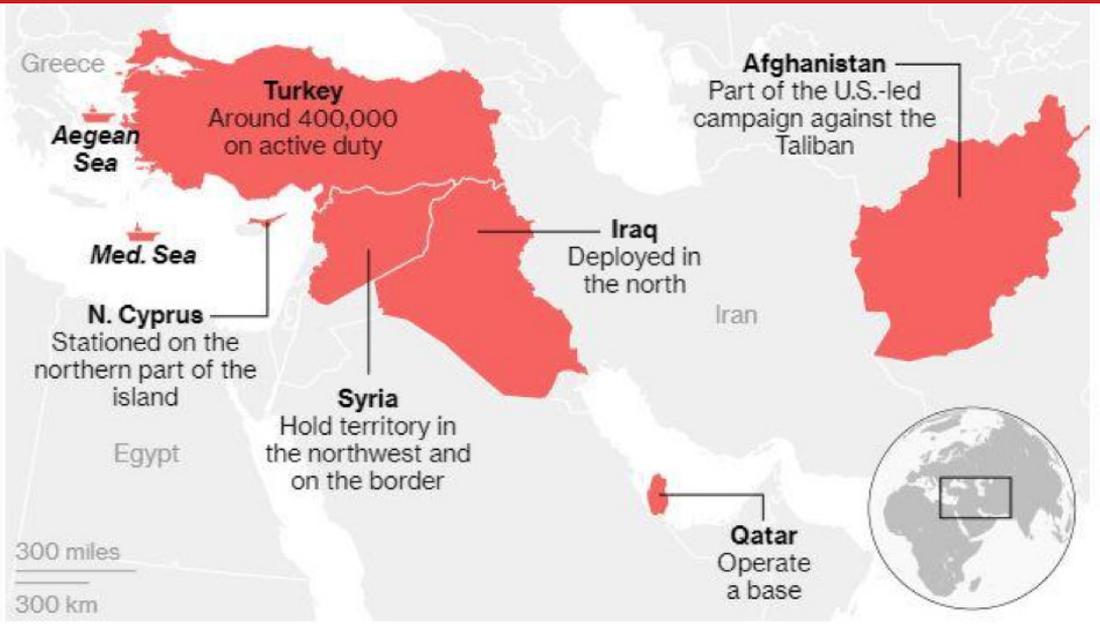
One of the important features of Turkey's CT efforts is multidimensionality. Geographically, Turkey's CT campaign has a multiregional character. Turkish security forces operate in Turkey, Iraq, and Syria in the fight against the PKK/YPG. Organizationally, Turkey's CT activism composes of different security and intelligence institutions. Operationally, Turkey's CT campaigns are simultaneously active on different layers of operational domains in order to fight the PKK, DAESH, and other terrorist organizations. Turkey's persistent CT efforts to contain the cross-border mobility of the terrorist organization gained momentum during Operation Claw. In an airstrike carried out by the MIT and TAF on July 30 in the Amedi/Pirozana region, it was determined that Hacı Kurhan, who was in charge of the PKK's so-called special forces and the TAK, and his deputy were neutralized.⁴⁸ In September, Nedim Karakulak, code-named Kawa Garzan, was neutralized by airstrikes jointly carried out by the TAF and MIT. Karakulak was in charge of the terrorist group's logistical support around the Qandil and Hakurk regions.⁴⁹ In the Kandil/Bawlah region, PKK/KCK executive council member "Peşin Tolhildan," code-named Gülüzar Tural, and

47. Tassos Tsiplakos, "Turkish 'Blue Motherland – Mavi Vatan' Exercise Raises Tension in Aegean and S.E. Mediterranean", South East Med Energy and Defense, March 1, 2019, <https://www.semedenergydefense.com/turkish-blue-motherlandmavi-vatan-exercise-raises-tension-in-aegean-and-s-e-mediterranean>

48. "Erbil Saldırısının Planlayıcılarına Sınır Ötesi Operasyon", Anadolu Agency, August 8, 2019.

49. "Senior PKK Terrorist among Killed in N. Iraq Op.", Anadolu Agency, September 3, 2019.

FIGURE 7: TURKEY'S FOREIGN DEPLOYMENTS



Note: Turkey also has a military presence in the Balkans and Somalia

Source: Bloomberg

executive council member of the women’s branch of the KJK “Jiyan Garzan,” code-named Saliha Kaytar, were neutralized.⁵⁰ Targeting the leadership resulted in the decrease in the PKK’s territorial control and logistical support lines in northern Iraq.

Moreover, in the fight against terrorism a new tactical asset was added to the TAF’s inventories. Bora SRBM, developed after Turkey was blocked from purchasing missile defense systems from non-NATO countries, was tested in May 2017 in the port of Sinop for the first time.⁵¹ Apparently, in a short period of time, the Turkish defense industry gained the capacity to manufacture its own missile systems. Regarding future combat needs and CT efforts, Bora SRBM may be a high-precision, conventional, and tactical asset.⁵²

Turkey’s Expanding Forward Military Presence

It is obvious that the Turkey-Qatar relations are of strategic importance from a military, economic, and political perspective. In particular, economic and military diplo-

50. “MİT ve TSK’dan Ortak Operasyon! Kırmızı Listedeki Terörist Gülüzar Tural Öldürüldü”, *Takvim*, September 11, 2019.

51. “Turkey Tests Indigenous “Bora” Ballistic Missile”, *Missile Threat*, May 11, 2017, <https://missilethreat.csis.org/turkey-tests-indigenous-bora-ballistic-missile>

52. Can Kasapoğlu, “Turkey’s Bora Missile Saw Combat Debut: What Next?”, *Anadolu Agency*, June 19, 2019.

macy are the main components of the bilateral relations while the diplomatic aspect is vital in terms of regional geopolitical developments. The recent Turkish and Qatari agreement to expand the Combined Joint Force Command in Doha with naval and aerial elements will intensify the Turkish military presence while counterbalancing Iranian and Saudi Arabian influences.⁵³ Along with the military partnership, Qatar's rising acquisitions of Turkish military systems from Turkish defense companies like Baykar, Nurol Makina, BMC, Anadolu Shipyard, ASELSAN - Qatar's Barzan Holdings' joint venture called BARQ may contribute to the strengthening of Qatar's ties to Turkey. Syria, Libya, and other regional issues represent the diplomatic commonalities between two countries.

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2020?

Turkey's Enhancing Naval Power Projection Capabilities

Blue Homeland was a message to the Eastern Mediterranean Gas Forum (EMGF), a coalition formed recently by Egypt, Israel, the Greek Cypriot administration, Greece, Italy, Jordan, and the Palestinian Authority which complicated the dispute on the exploration of energy resources in the Eastern Mediterranean Sea. The recent memorandum of understanding (MOU) on the "delimitation of maritime jurisdiction areas in the Mediterranean" between Turkey and Libya⁵⁴ will definitely be a crucial step for consolidating Turkey's military and diplomatic position in this dispute.

In brief, this exercise, in which the Turkish Navy was utilized as an active foreign policy tool in response to the recent political and military affairs in the region, also reinforced Turkey's military position and political claims. Moreover, the ever-developing Turkish defense industry will significantly contribute to vitalizing Turkey's position in the region. It should be expected that Turkey will deepen its naval power especially in the Eastern Mediterranean.

Turkey's Persistent CT Efforts

Attributing importance to challenging the terrorist organizations asymmetrical-ly and decapitating the leadership structure of the terrorist organizations, Turkey is transforming the perceptions in its CT policy to prevent the mobilization in different terrorist organizations in Turkey, Syria, and Iraq. Establishing a number

53. "Turkey Expands Its Military Base and Influence in Qatar", The New Arab, September 10, 2019, <https://www.alaraby.co.uk/english/indepth/2019/9/10/turkey-expands-its-military-base-and-influence-in-qatar>

54. "Turkey Signs Maritime Boundaries Deal with Libya Amid Exploration Row", Reuters, November 28, 2019.

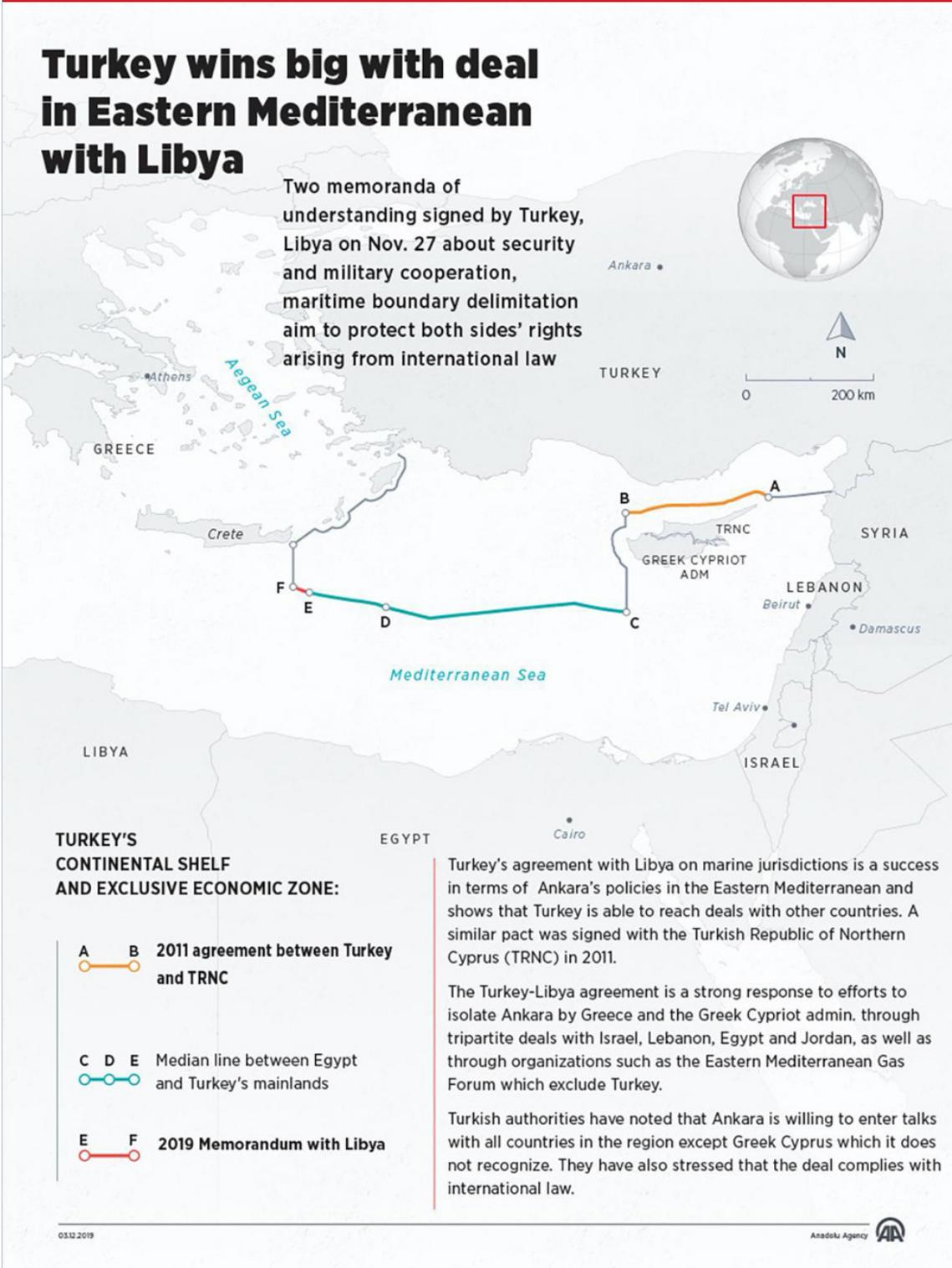
of safe pockets along the Iraqi border since the end of 2017, Turkey has gained a prominent benefit in consolidating its border security. It should be expected that Turkey will focus on three regions in terms of its CT activities. Syria and Iraq will be the most important security environment which the Turkish CT activities will cover in the coming term. Turkey's internal domestic environment will be also be a target of CT activities.

Turkey's Expanding Forward Military Presence

A potential rapprochement between the Saudi and Qatari administrations may negatively impact Turkish-Qatari relations and Turkey's military presence since Qatar's reliance on Turkey may diminish when relations with the Gulf Cooperation Council (GCC) normalize. Qatari Foreign Minister Sheikh Mohammed Al Thani's visit to Riyadh in October, Qatar's expression of mere reservation during an Arab League vote to condemn Turkey's Operation Peace Spring, and Turkey's declaration of its willingness to send troops to Libya where Turkey and Qatar have been supporting divergent armed groups may be the first signs of fractures between the two countries.⁵⁵ However, under the condition of the lack of trust between Qatar and GCC countries and the restrictive regional security environment, it should not be expected that Qatar will change its foreign policy vis-à-vis Turkey.

55. Pinar Tremblay, "Is Turkey about to Lose Its Only Ally in the Gulf?", Al Monitor, December 13, 2019, <https://www.al-monitor.com/pulse/originals/2019/12/turkey-qatar-is-ankara-about-to-lose-its-only-ally-in-gulf.html#ix-zz68D1tcZKt>

FIGURE 8: TURKEY'S CONTINENTAL SHELF AND EXCLUSIVE ECONOMIC ZONE (EEZ)



Source: Anadolu Agency

TURKEY'S DEFENSE INDUSTRY IN 2020: A QUEST FOR AUTONOMY

SUMMARY OF 2019

- In January 2019, three contracts covering the sale of six Bayraktar TB2 UAVs, ground control stations, and the supply of systems and equipment were signed between Turkey and Ukraine.
- Between February and March, Turkey launched the largest maritime drill in the country's history, Blue Homeland, simultaneously testing its war fighting capabilities in the Black Sea, Aegean Sea, and Eastern Mediterranean Sea.
- Turkish Aerospace Industries (TAI) unveiled a full-scale model of TF-X fighter aircraft at the Paris Air Show in June.
- The first batch of the S-400 defense system was delivered from Russia to Turkey between July and September.
- *TCG Kinaliada*, the fourth vessel of the Ada-class corvettes developed under the MILGEM Project, was commissioned in September 2019.
- Turkey officially launched the MILDEN (Milli Denizalti) Project in October 2019 to indigenously build modern submarines.
- Five Turkish companies entered the Defense News Top 100 in 2019, namely ASELSAN, TAI, STM, BMC, and Roketsan.
- Turkey initiated new education programs to increase the value of its human resources in the defense industry.

Three contracts covering the sale of six Bayraktar TB2 UAVs, ground control stations, and the supply of systems and equipment were signed between Turkey and Ukraine in January. On October 22, the delivery of Bayraktar TB2 UAVs, developed by Baykar Defense, to the Ukrainian Air Force was completed. The Ukrainian personnel who will use the platforms trained in Turkey.⁵⁶ The delivery of the first batch of the S-400 defense system to Turkey started on July 12 and was completed on September 15, after two rounds of transfers in three months. The fourth vessel of the Ada-class corvettes developed under the MILGEM Project, *TCG-Kınaliada* (F-514), was commissioned in September.

Turkey officially launched the MILDEN (Milli Denizalti) Project to indigenously build modern submarines in October. German design, technology, and information will continue to be the main sources for the newest submarines to be produced under the MILDEN project. The project's first submarine will be delivered in 2030.

In January, a protocol was signed between the Ministry of National Education and ASELSAN regarding the establishment of a vocational and technical high school that would significantly increase the qualified labor force needed by the Turkish defense industry. The school is located in the Yenimahalle district of Ankara and started educating its first students in September.⁵⁷ Meanwhile, an Industrial PhD program launched by Scientific and Technological Research Council of Turkey (TÜBİTAK) in 2018 called for new applications. In this context, monthly scholarships of 4,500 TL will be given to the doctoral students admitted to the program for four years. Minister of Industry and Technology Mustafa Varank said, "We are implementing this program as one of the important components of our 'National Technology Move' vision."⁵⁸

DYNAMICS OF TURKEY'S DEFENSE POLICIES

Defense Cooperation and Export Prospects

Turkey's defense relations in 2019 continued to be greatly influenced by foreign policy considerations and political tensions. Several European countries banned arms sales to Turkey after the latter's launch of the OPS. However, Germany resumed

56. "Bayraktar İHA'ların Teslimatı Tamamlandı", C4Defence, October 22, 2019, <http://www.c4defence.com/Gundem/bayraktar-ihalarin-teslimati-tamamlandi/8842/1>

57. Burcu Çalık, "ASELSAN Mesleki ve Teknik Anadolu Lisesi Eğitime Başladı", AA, September 11, 2019.

58. Dilara Zengin, "Üniversite-Sanayi İşbirliği Güçlenerek Devam Ediyor", AA, October 14, 2019.

selling arms to Turkey after a few months, particularly for the naval forces, including Turkey's submarine modernization.

In recent years, Turkey's close defense relations with Pakistan have risen to a strategic level and have obtained an influence beyond that of the bilateral relations. In 2018, Pakistani authorities announced that the country would procure four Ada-class corvettes for its navy. Turkey's Defense Minister described the deal as "Turkey's largest defense export in one agreement."⁵⁹ On September 29, 2019, Turkish Anadolu Shipyard began work on the first of the four corvettes for the Pakistani Navy.⁶⁰

However, Turkey's increasingly closer defense ties with Pakistan also problematized Turkish engagement with India's defense market, along with the wider implications of the close Indian-American defense relations. Indian authorities banned Anadolu Shipyard from conducting business in the country, and removed the company from the technology partnership of the Indian Navy's \$2 billion fleet support ships program on the grounds that it could cause grave national security consequences because of the close Turkey-Pakistan ties.⁶¹

The S-400 and F-35 Conundrum

Turkey signed a contract with Russia in April 2017 to purchase the advanced S-400 air/missile defense systems. Tensions between the United States and Turkey have escalated ever since over the deal as the U.S. contends that simultaneous operation of both S-400 and F-35 could expose sensitive details about the stealth fighter's radar signature, among other alleged concerns. After the U.S. failure to impede Turkey's purchase of the S-400s, and the subsequent Russian delivery of the systems to Turkish territory, throughout the year, the U.S. pressured Turkey not to activate the systems. Turkish decision-makers, at every opportunity, insisted that Turkey will activate the systems as soon as possible in order to deter urgent threats emanating from the region. Turkish Minister of Defense Hulusi Akar stated that the systems will be fully operational after the training of Turkish personnel is completed.⁶²

59. "Turkey to Sell Four Corvette Ships to Pakistan: Minister", *Hürriyet Daily News*, July 5, 2018.

60. Gabriel Dominguez, "Turkey Begins Work on First MILGEM-Class Corvette for Pakistan Navy", *Jane's*, September 30, 2019, <https://www.janes.com/article/91599/turkey-begins-work-on-first-milgem-class-corvette-for-pakistan-navy>

61. Vivek Raghuvanshi, "India Targets Turkish Shipyard over Ties with Pakistan", *Defense News*, October 3, 2019, <https://www.defensenews.com/industry/2019/10/03/india-targets-turkish-shipyard-over-ties-with-pakistan>

62. Muhammed Emin Avundukluoğlu, "Turkey to Activate S-400 Missile Defense Systems", *AA*, December 21, 2019.

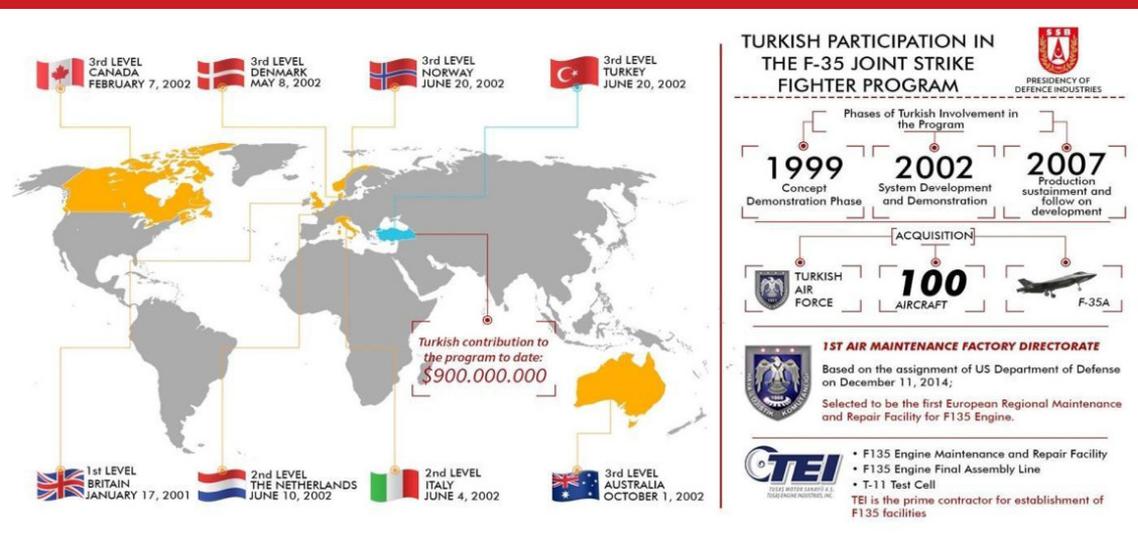
FIGURE 9: TURKISH PARTICIPATION IN THE F-35 JSF PROGRAM



Source: Presidency of Defence Industries (SSB)

After Turkey started the delivery of the first S-400 batch in July, the U.S. suspended Turkey from the F-35 program. Officially, two F-35As were delivered to Turkey but they remained in the U.S. for training purposes; they are still located at Luke Air Force Base in Arizona. Turkey is not a customer of the joint strike fighter but it is a member of the team of producers and partners behind it. Several Turkish companies have produced hundreds of various components for the fighter aircraft. Furthermore, Turkish companies are the sole producers of a significant number of the aircraft's parts.

FIGURE 10: TURKISH PARTICIPATION IN THE F-35 JSF PROGRAM



Source: Presidency of Defence Industries

Supplying the TAF with Modern Weapons

The National Infantry Rifle (MPT) series produced within the scope of the Modern Infantry Rifle Project was used successfully in Operation Peace Spring in October. The MPT-55, its developed model MPT-76, and sniper weapon KNT-76 are indigenously produced rifles that were used in the operation.⁶³ On the other hand, learning lessons from the previous operations in northern Syria, the Turkish M60T main battle tanks were equipped with reactive armor protection capability for the first time by national efforts with a modernization project in Kayseri 2nd Maintenance Center. The modernization project enhanced the abilities of the M60Ts in terms of targeting, movement, and anti-tank missile detection.⁶⁴

In terms of air power, in recent years, Turkey has emerged as one of the leading countries in drone technology. Baykar Makine's Bayraktar TB2 and TAI's Anka-S proved their effectiveness both in attack missions as well as intelligence, surveillance, and reconnaissance operations. Particularly in internal security operations, Turkey's rapidly increasing drone capabilities have boosted success, saved the lives of Turkish Army personnel, and lowered the cost of operations. Lastly, during Operation Peace Spring, the TAF used Bayraktar TB2 and Anka-S, among other mini drones.⁶⁵

Regarding naval power, Turkey completed the fourth of the Ada-class corvettes, the *TCG-Kınalıada*, under the MILGEM Project which envisions advancing Turkish Navy's abilities, including anti-submarine warfare, patrolling, and search & rescue missions with stealth technologies. Meanwhile, the Atmaca anti-ship missile, which was first tested in November 2018 and unveiled for the first time in IDEF 2019, was fitted aboard the *TCG-Kınalıada* and launched a successful test-fire from the vessel on November 4, 2019.⁶⁶ Furthermore, Turkey launched the MILDEN Project to build indigenous submarines that would significantly enhance its future submarine fleet's ability to remain submerged.⁶⁷ Within the scope of the project, six new submarines are expected to enter the Turkish Navy's service by the 2030s.

63. Behçet Alkan, "Mehmetçik Yerli Silahlarla Teröristlerin Peşinde", AA, October 17, 2019.

64. Ibid.

65. See SSB graph on Twitter, October 17, 2019: <https://twitter.com/SavunmaSanayii/status/1184711627108732930/photo/1>

66. See video, SSB, "Türkiye'nin İlk Milli Deniz Seyir Füzesi Atmaca, TCG Kınalıada Gemisinden Başarıyla Fırlatıldı (Video)", November 4, 2019, <https://www.ssb.gov.tr/WebSite/contentList.aspx?PageID=2202&LangID=1>

67. H. I. Sutton, "Turkey to Go Its Own Way with Submarines", *Forbes*, October 20, 2019, <https://www.forbes.com/sites/hisutton/2019/10/20/turkey-to-go-own-way-with-submarines/#c60368f12f72>

FIGURE 11: THE ATMACA ANTI-SHIP MISSILE IS FITTED ABOARD THE TCG-KINALIADA, THE FOURTH AND FINAL ADA-CLASS CORVETTE OF THE MILGEM PROJECT



Source: https://twitter.com/Ozkok_A/status/1159078284824588289?ref_src=twsrc%5Etfw%7Ctwcamp%5Etw-embed%7Ctwtterm%5E1159078284824588289&ref_url=https%3A%2F%2Fwww.navalnews.com%2Fnaval-news%2F2019%2F08%2Fatmaca-anti-ship-missile-fitted-aboard-turkish-navys-4th-ada-class-corvette%2F

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2020?

Indigenous Development: Autarky, Increased Capabilities, and Deterrence

Turkey aims to achieve 75 percent independence in the defense sector by the year 2023, according to the Presidency of Defence Industries' (SSB) Strategic Plan of 2019-2023. The document suggests actions to be implemented in order to increase national capabilities, supply security personnel with the newest technologies, enhance human resources and skills, and promote export opportunities.⁶⁸

Turkey's indigenous capabilities in the defense sector provide the country advanced capabilities while increasing the deterrence of the TAF in a volatile region ranging from the Eastern Mediterranean to the Middle East. Turkey's investments in its national defense industry not only aim to bolster the country's defense but also envision power projection overseas. Particularly in the naval sector, this desire is clear given Turkey's huge investments in vessels that conduct surface-to-surface and surface-to-air warfare, amphibious operations, anti-submarine warfare, target identification, early warning, and surveillance and reconnaissance missions along with efforts to develop high-precision, long-range, surface-to-surface, precision strike anti-ship missiles.

TCG-Anadolu, Turkey's largest indigenous shipbuilding project that will be the flagship of the Turkish Navy, symbolizes the country's desire for power projection.

68. SSB, "Stratejik Plan: 2019-2023", December 2019.

TCG-Anadolu is expected to come into service in 2020. It is a landing helicopter dock (LHD) that can transport an amphibious battalion-sized unit along with the relevant combat and support vehicles while having a fully equipped flight dock with a ski-jump ramp to operate STOVL aircraft (currently viable for F-35B⁶⁹) and helicopters.⁷⁰ Initially planned as a platform that operates helicopters, *Anadolu* was later considered to project air power while Turkey ordered 16 F-35Bs for its naval forces and established a naval aviation school to train Turkish Navy personnel for flight missions.⁷¹ However, Turkey's suspension from the F-35 program complicated the issue, leaving *Anadolu* mainly as an amphibious assault ship that can project land power with close helicopter air support missions. Despite this problem, *Anadolu* with the support of armors will provide the Turkish Navy with flexible capabilities to conduct operations against asymmetrical threats with fully equipped marine forces.

The S-400 and F-35 Conundrum

The escalated tensions between Turkey and the U.S. paved the way for a possible Turkish procurement of the Russian-made aircraft Su-35. When President Erdoğan joined his counterpart Vladimir Putin at the opening of the biennial MAKS aviation show outside of Moscow on August 27, he asked Putin, "So now, we are going to buy this one?" pointing at the Su-57 aircraft.⁷² Similarly, Russia proposed to sell its Su-35 fighter to Turkey and the head of SSB Ismail Demir argued that that offer is under evaluation regarding its strategic and financial dimensions and that the decision will be made after a comprehensive analysis. Reports indicate that the official negotiations over the purchase of 36 Russian Su-35 aircraft have taken place since President Erdoğan's visit to MAKS aviation show in late August.⁷³

After India's withdrawal from the partnership on Russian Su-57, the current cancellation of F-35 transfers to Turkey was welcomed by Russia which saw an op-

69. Arda Mevlütoğlu, "Uçağın Gemisi", Siyah Gri Beyaz, December 26, 2017, <https://www.siyahgribeyaz.com/2017/10/ucagn-gemisi.html>

70. Aselsan, "Çok Maksatlı Amfibi Hücum Gemisi (LHD)", <https://www.aselsan.com.tr/tr/cozumlerimiz/deniz-sistemleri/savas-sistemi-tasarimi-ve-entegrasyonu/cok-maksatli-amfibi-hucum-gemisi-lhd>; George Allison, "Turkey to Operate 'Carrier without Jets' in 2020", UK Defence Journal, December 9, 2019, <https://ukdefencejournal.org.uk/turkey-to-operate-carrier-without-jets-in-2020>

71. "Deniz Kuvvetleri Komutanlığı, Dikey İnebilen 16 Tane F-35B Savaş Uçağı Alımı için Talepname Hazırladı", *Star*, November 9, 2018.

72. Joseph Trevithick, "'We're Buying This One?' Turkey's Erdogan Asks Putin in Front of Su-57 Fighter at Air Show", *The Drive*, August 27, 2019, <https://www.thedrive.com/the-war-zone/29592/were-buying-this-one-turkeys-erdogan-asks-putin-in-front-of-su-57-fighter-at-air-show>

73. "Ankara Evaluating Russia's Su-35 Fighter Jet Offer, Head of Top Defense Body Says", *Daily Sabah*, November 4, 2019.

portunity for Turkey to order Su-57s, along with Su-35s.⁷⁴ While, the realization of this scenario would require a profound change in the Turkish security doctrine, possible Russian proposals over offset agreements and particularly technology transfer opportunities may be a game-changer in the coming term that may steer Turkish decision-makers toward purchasing Russian aircraft.⁷⁵

Similarly, Turkey's air/missile defense system procurement will remain as another significant development in the coming year. While Turkey still officially desires to buy Patriot systems from the U.S. under the logic of a multilayered air/missile defense,⁷⁶ it seems that the delivery of the second batch of the S-400s will be a delicate issue between Turkey and Russia. Because of the protracted discussions over technology sharing and co-production, the head of SSB Ismail Demir stated that the delivery of the second batch may be delayed beyond 2020.⁷⁷ It is also a possibility that the delivery will be used as a bargaining leverage against the U.S. by Turkey.⁷⁸ On the other hand, Eurosam SAMP/T will continue to be a significant alternative for Turkey's air/missile defense procurement.⁷⁹

Technology sharing in air/missile defense platforms will remain a strategic goal for Turkey as the country has been investing in its own short-, medium-, and long-range air/missile defense systems. Indeed, ASELSAN made the first delivery of the Korkut⁸⁰ low-altitude air defense system in March 2019 and a total of 13 systems were delivered to TAF previous year.⁸¹ Along with that, Turkish defense giants are working on the SIPER and HISAR projects that are expected to provide the country with a truly multilayered air/missile defense structure.

74. For instance see, Joseph Trevithick, "It's No Surprise India Finally Ditched Its Stealth Fighter Program with Russia", The Drive, April 23, 2018, <https://www.thedrive.com/the-war-zone/20347/its-no-surprise-india-finally-ditched-its-stealth-fighter-program-with-russia>

75. Tyler Rogoway, "U.S. Withholding F-35 from Turkey Could Give Russia the Chance It Needs to Export SU-57", The Drive, April 2, 2019, <https://www.thedrive.com/the-war-zone/27254/u-s-withholding-f-35-from-turkey-could-give-russia-chance-it-needs-to-export-su-57>

76. "Erdoğan: S-400'ü Bırakıp Tamamen Patriot'a Yönelmemiz Gibi Bir Şey Olamaz", Euronews Türkçe, November 14, 2019.

77. "Turkey Says Delivery of Second Russian S-400 Batch May Be Delayed", Reuters, November 4, 2019, <https://www.reuters.com/article/us-russia-turkey-defense/turkey-says-delivery-of-second-russian-s-400-batch-may-be-delayed-idUSKBN1XE0U1>

78. Burak Ege Bekdil, "Here's What Could Cause the Next Russian S-400 Shipment to Turkey to Arrive Late", Defense News, November 12, 2019, <https://www.defensenews.com/global/europe/2019/11/12/heres-what-could-cause-the-next-russian-s-400-shipment-to-turkey-to-arrive-late>

79. Merve Seren, "An Alternative Vendor for Turkey's Missile Defense: Eurosam's SAMP/T", The New Turkey, <https://thenewturkey.org/an-alternative-vendor-for-turkeys-missile-defense-eurosams-samp-t>

80. "Kundağı Motorlu Namlulu Alçak İrtifa Hava Savunma Silah Sistemi", ASELSAN, https://www.aselsan.com.tr/KORKUT_SSA_2484.pdf

81. "13 Adet Korkut Alçak İrtifa Hava Savunma Silah Sistemini Tsk'ya Teslim Ettik (Video)", SSB, November 12, 2019, <https://www.ssb.gov.tr/WebSite/contentList.aspx?PageID=2219&LangID=1>

Innovation, Sustainability, and Specialization

While Turkey has been investing in a comprehensive manner in a range of defense sectors on the land, naval, air, and space platforms, there are serious challenges along with benefits for the country. Being and remaining innovative is a key to achieving a global-player status in the defense sector, while finding new export markets and deepening the existing cooperation is vital to sustainability. However, rather than producing several different platforms and spending on R&D in all areas, Turkey will need to concentrate on key sectors, both in production and in R&D.

Head of SSB Ismail Demir emphasized this point by stating that being among the best in the world in specific fields would in turn change the perceptions of the entire Turkish defense industry and that Turkey should be a leading country in the world in specific defense products.⁸² On the other hand, Demir has also cautioned and maintained that Turkey has to be prudent rather than reckless in the indigenous development of sophisticated weapon systems such as the fifth generation fighter aircraft project. Demir stated that it would be better to talk about the possibilities and details instead of failing after making big promises.⁸³

82. "Savunma Ve Havacilik Sanayiinde Küresel Stratejiler Konferansi", SSB, November 30, 2019, <https://www.ssb.gov.tr/WebSite/contentList.aspx?PageID=2253&LangID=1>

83. Ibid.

ENERGY POLITICS IN THE EASTERN MEDITERRANEAN: CONFRONTATION OR COMPROMISE?

SUMMARY OF 2019

- Turkey's and the Turkish Republic of North Cyprus's rights are ignored by the "Energy Bloc" of Israel, Greece, the Greek Cypriot administration, and Egypt.
- Turkey was passively reactive to counter the attempts of these countries within the limits of diplomacy and symmetric undertakings until a refusal for a compromise was apparently sounded.
- The militarism of all parties may lead to misunderstandings and start a regional crisis with grave consequences.
- The exclusive economic zone (EEZ) delimitation with Libya challenged the existing calculations of all actors in the Eastern Mediterranean Sea.
- Egypt, Israel, and Lebanon may gain a more exclusive economic zone pending the agreement of Libya and Turkey on delimiting the exclusive economic zone of both parties and the island status of Cyprus that will have partial or no effect on the exclusive economic zone of Turkey's mainland in accordance with 1982 Convention.
- The claims and arguments may be compromised if the actors in the region agree to share rather than having relative gain.

The discovery of energy resources in the Eastern Mediterranean Sea offered both hope and concern for the regional and global actors in terms of whether to compromise their political grievances or sharply escalate the tension in order to gain a maximum share. In this sense optimists had hoped for a de-escalation of long-lasting political grievances by the positive catalyst of the promise of energy income, while pessimists cautioned of the probable competition that might deepen the already deadlocked and complex problem fields in question. Unfortunately, the latter dominated because the ones who were keen to benefit from the marketing of gas persisted (and persist) in taking the vast bulk of the gas share. As a result, it has become obvious that the Eastern Mediterranean Sea will be a hot issue that could create political, diplomatic, and to some extent military turbulence among the regional actors, sided by the global actors.

On March 20, U.S. Secretary of State Mike Pompeo attended the Sixth Summit Meeting between Israel, Greece, and the Greek Cypriot administration in Jerusalem “to affirm the share commitment... to promote energy independence and security... against malign influences in the Eastern Mediterranean and the broader Middle East.”⁸⁴ The joint declaration covertly pointed towards Turkey as the “malign influence” but refrained from overtly sounding Turkey as the challenger.

On May 3, Turkish Petroleum started drilling operations in the licensed areas in accordance with Turkey’s Continental Shelf Declarations of 2009 and 2012. The Greek Cypriots threatened the drilling company by issuing arrest warrants against those involved in or cooperating with the drilling activities.⁸⁵

The EU issued an announcement in favor of the Greek Cypriots for their alleged rights in the Eastern Mediterranean Sea on May 4, 2019.⁸⁶ The U.S. announcement complemented Mogherini’s statement on the following day. President of the TRNC Mustafa Akıncı responded to the announcements on June 11, 2019, and repeated the proposal of cooperation on hydrocarbons by means of a joint commission. Turkey sent a second drilling vessel, *Yavuz*, to the east of the Cyprus island on July 8, 2019, as can be seen in Figure 12. Meanwhile Mustafa Akıncı, again, repeated the previous proposal to the Greek Cypriot leader Anastasiades on July 13. But despite the compromise efforts from the Turkish side, July 15 witnessed punitive measures

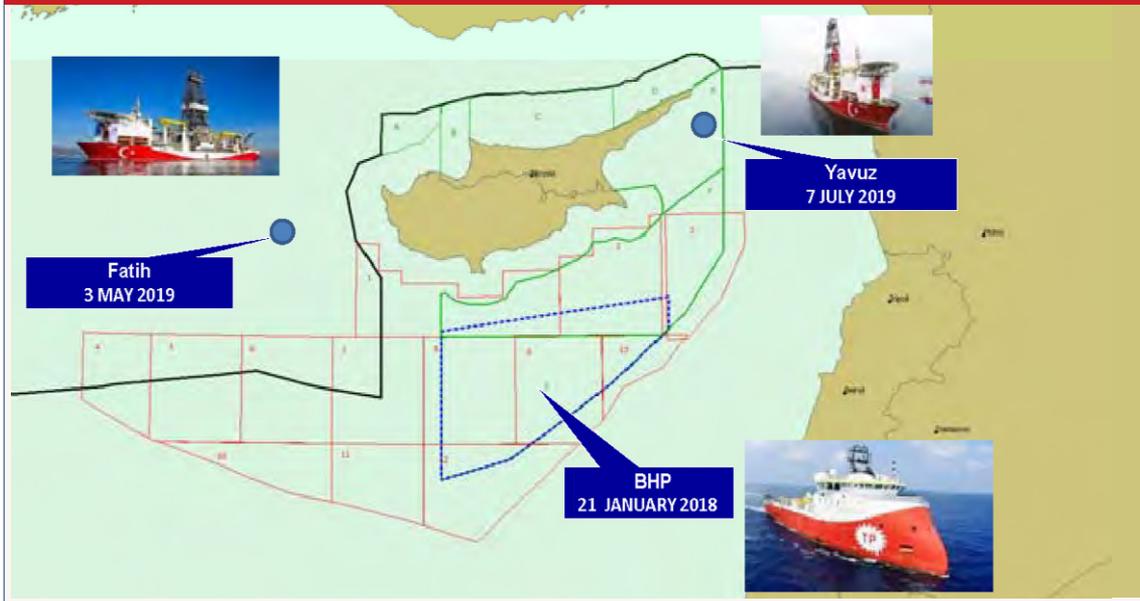
84. “Joint Declaration Between Cyprus, Greece, Israel, and the U.S. After the 6th Trilateral Summit”, U.S. Embassy and Consulate in Greece, March 21, 2019, <https://gr.usembassy.gov/joint-declaration-between-cyprus-greece-israel-and-the-u-s-after-the-6th-trilateral-summit>

85. “Southern Cyprus Issues Arrest Warrant Against Turkey’s Drill Ship Fatih”, BIANET, June 10, 2019, available at <http://bianet.org/english/crisis/209215-southern-cyprus-issues-arrest-warrant-against-turkey-s-drill-ship-fatih>

86. “Statement by High Representative/Vice-President Federica Mogherini on Turkey’s Intended Drilling Activities within the Exclusive Economic Zone of Cyprus”, https://eeas.europa.eu/headquarters/headquarters-homepage/61836/statement-high-representativevice-president-federica-mogherini-turkeys-intended-drilling_en,

by the EU towards Turkey. The council threatened to suspend negotiations on the Comprehensive Air Transport Agreement and the EU–Turkey high-level dialogues, to reduce pre-accession assistance to Turkey for 2020, and invited the European Investment Bank to review its lending activities.⁸⁷

FIGURE 12: TURKEY'S OFFSHORE DRILLING ACTIVITIES



Source: http://www.mfa.gov.tr/site_media/html/Maritime-Delimitation-Offshore-Activities-Presentation-17-September-2019.pdf

In July, Turkey announced to the international community and registered with the UN its continental shelf in the region, which is *ab initio* and *ipso facto* (inherent right – no need for proclamation), and that reaches to an equidistance from Egypt. The declaration indicates that Turkey has sovereign rights in the continental shelf and is not required to inform the UN.

In December, Turkey and Libya agreed on the limits of their exclusive economic zone. Greece reacted to the agreement after its exclusive economic zone was trimmed towards the eastern Mediterranean Sea. Greece lacked physical touch to the exclusive economic zone of Egypt and GC that prisoned her to the Aegean Sea and a small portion of the Mediterranean Sea. Greece invited the Haftar-controlled self-ruling Libyan Parliament Speaker Aguila Saleh to Athens and claims that the Turkish-Libyan agreement is not valid.⁸⁸ On the other hand, Khalifa Haftar, who attacked Tripoli

87. “EU Penalizes Turkey over Cyprus Offshore Drilling”, DW, July 15, 2019.

88. “Head of Libya Parliament Says Turkey-Libyan Deal Invalid”, Reuters, December 12, 2019.

where the UN-recognized legitimate Libyan government resides, delivered a speech stating, “Zero Hour has come for Tripoli, heralding an intense offensive to take the city.”⁸⁹ The series of events and the announcement by Haftar indicates probable involvement of Greece to topple the legitimate government of Libya in order to invalidate the Turkey-Libya agreement.

DYNAMICS OF ENERGY POLITICS AND GEOPOLITICAL RIVALRY

Regional Dynamics

In early 2019, Greek Cypriot Administration, Israel, and Egypt together with neighbors Greece, Jordan, the Palestinian Authority, and Italy founded the East Mediterranean Gas Forum.⁹⁰ The forum was established not only to regulate the marketing of gas in the Mediterranean Basin, but also set up a political arrangement to have members act in parallel with the will of the dominant members (Israel, Greece, Egypt, Greek Cypriot administration). Turkey perceived this undertaking as a political maneuver to exclude and isolate it from its energy share.

Military Activism

Turkey was determined to be a part of the energy politics in the region. The activities of four members of the forum, mainly the Greek Cypriots, led Turkey to deliver a physical message by military strength. Turkey declared navigational telex (NAVTEX) and conducted military exercises with the Turkish Navy, Air Force, and Special Forces. In this sense, Turkish warships denied access to the ENI Italian-contracted SAIPEM 12000 drillship on February 2018.⁹¹ As far as Turkey achieved the desired outcome by declared NAVTEX and terminated it, a series of military exercises has been announced in the Mediterranean Sea by all parties as a deterrent step. Among these, Turkish Blue Homeland (Mavi Vatan) 2019 gave a strong message that Turkey has the capacity to respond to any threat in its three seas (Black, Aegean, and Mediterranean Seas), territorial land, and air space.⁹² Turkish gas exploration and drilling efforts, on the other hand, required Turkey to take military measures

89. Lauren Fagan, “Libya’s Haftar Warns ‘Zero Hour’ Has Come for Tripoli”, *Africa Times*, December 13, 2019, available at <https://africatimes.com/2019/12/13/libyas-haftar-warns-zero-hour-has-come-for-tripoli>

90. Selcan Hacaoglu, “How Turkey Is Spoiling Big Plan for Mediterranean Gas”, *Washington Post*, December 10, 2019.

91. AP, “Turkish ‘Warships’ Stop Italy’s ENI Rig in Waters off Famagusta: Greek Cypriot Reports”, *Hurriyet Daily News*, February 10, 2018.

92. Uğur Yıldırım, “Türk Donanmasından Üç Denizde Tatbikat”, *Sabah*, February 28, 2019.

around the *Fatih*, *Yavuz*, *Barbaros*, and *Oruç Reis* vessels to protect them against any enforcement. The Turkish Navy, Air Forces, and unmanned aerial vehicles started to patrol around the Turkish vessels⁹³ and secured them with 26 warships in the Mediterranean Shield Operation of the Turkish Armed Forces.⁹⁴

Other than Turkey's military measures, Greece and the Greek Cypriot administration started military activities along with France and Italy in the Eastern Mediterranean Sea. As such, France and the Greek Cypriots announced a joint military exercise, the Joint Aeronautical Exercise (PASSEX), in Blocks 6,7,10, and 11 of the alleged exclusive economic zone.⁹⁵ PASSEX-type exercises continued with the inclusion of Italy. The Greek Cypriots announced that the exercises, which are called "CYP/FRA/IT 2019," will be performed in the coming months to enhance military cooperation.⁹⁶

Conflicting Theses

The Turkish thesis is based on international law and the relevant court decisions in addition to the inherent rights of the Turkish Cypriots based on the founding 1960 Constitution of the Republic of Cyprus. In this context, it is argued that the "Island of Cyprus cannot generate a full EEZ based on a simplistic equidistance delimitation method in the west of the island as it distorts the equitable delimitation under international law, ... [but only special treatment which will have partial or no effect in generating an EEZ]."⁹⁷ Turkey claims that "the final maritime boundaries in that part of the Mediterranean can only be settled through agreements to be concluded between the coastal states based on international law and [the principle of equity]."⁹⁸ Therefore, in line with international law, Turkey has been fully exercising its sovereign rights over its continental shelf. Besides according to Turkey, Greek Cypriots disregard the rights of the Turkish Cypriots, as the co-owners of the Island.

93. "Türk Donanması Doğu Akdeniz'i Korumaya Devam Ediyor", Haberler, August 2, 2019, <https://www.haberler.com/turk-donanmasi-dogu-akdeniz-i-korumaya-devam-12298800-haberi>

94. "TSK Akdeniz Kalkanı Harekatı Kapsamında 26 Gemi Korvet ve Denizaltı Karakollarla Akdeniz'deydi", *Sabah*, March 19, 2019.

95. "France, Cyprus Complete Military Exercise in EEZ", Cyprus News Agency, October 2, 2019, <https://cyprus-mail.com/2019/10/14/france-cyprus-complete-military-exercise-in-eez>

96. "France, Italy and Cyprus to Conduct Joint Naval Exercises in Eastern Mediterranean", Greek Greece Reporter, December 11, 2019, <https://greece.greekreporter.com/2019/12/11/france-italy-and-cyprus-to-conduct-joint-naval-exercises-in-eastern-mediterranean>

97. Ambassador Çağatay Erçiyev's Briefing to Ambassadors and Diplomatic Missions in Ankara, May 13, 2019.

98. Ibid.

FIGURE 13: CLAIMS OF GREECE AND GREEK CYPRIOTS



Source: http://www.mfa.gov.tr/site_media/html/Maritime-Delimitation-Offshore-Activities-Presentation-17-September-2019.pdf

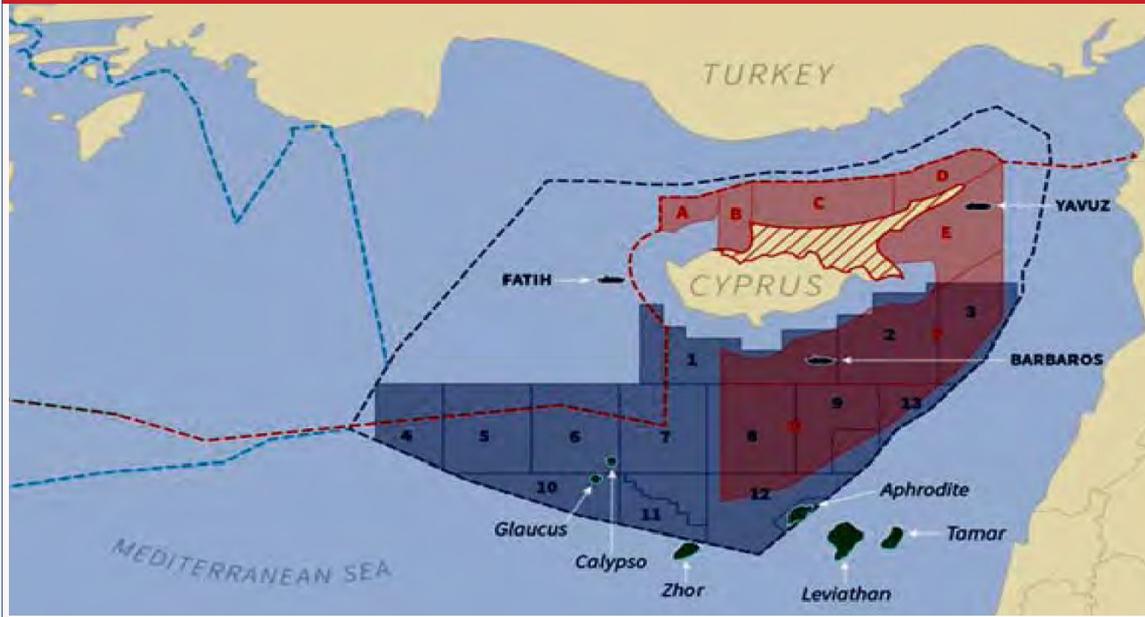
The Greek Cypriots perceives the declared exclusive economic zone as a sovereign right based on international law. In a presentation by the Greek Cypriot Permanent Secretary of the Ministry of Foreign Affairs, Ambassador Tasos Tzionis to EU Member States' ambassadors in order to inform them about recent developments, he based the claims of the Greek Cypriot administration on the statements of former EU, Greek, French, Egyptian, Italian, and U.S. officials.⁹⁹ Rather than referring to international law and court decisions, the Greek Cypriots are focused on the survey and drilling activities of Turkey and pledges to the MNECs along with ongoing diplomatic efforts with their coastal neighbors. Furthermore, the presentation frequently mentions the Greek Cypriot membership in the European Union. On the other hand, the presentation did not address how the Greek Cypriot administration addresses the claims of the Turkish Cypriots based on the already valid 1960 Constitution. The energy policy of the Greek Cypriots leans on international support, exploiting the privilege of being an internationally recognized government, and a

99. GC Ministry of Foreign Affairs, October 9, 2019, [http://www.mfa.gov.cy/mfa/mfa2016.nsf/A6B1A4248E3EAED6C225848F00349E79/\\$file/DEVELOPMENTS%20IN%20THE%20EEZ%20AND%20CONTINENTAL%20SHELF%20CYPRUS%20\(2\).pdf](http://www.mfa.gov.cy/mfa/mfa2016.nsf/A6B1A4248E3EAED6C225848F00349E79/$file/DEVELOPMENTS%20IN%20THE%20EEZ%20AND%20CONTINENTAL%20SHELF%20CYPRUS%20(2).pdf)

member of the EU. The Greek and Greek Cypriot claims, which are favored by the United States and the EU, are delineated in Figure 13.

Comparison of Turkish and Greek/Greek Cypriot Claims

FIGURE 14: OVERLAPPING AREAS OF GREECE, TURKEY, TRNC, AND GC



Source: http://www.mfa.gov.tr/site_media/html/Maritime-Delimitation-Offshore-Activities-Presentation-17-September-2019.pdf

The claims and overlaps of Greece, the Greek Cypriot administration, Turkey, and the TRNC are depicted in Figure 14. Greece claims exclusive economic zone for all the islands in the Eastern Mediterranean Sea and limits the Turkish zone to the shores of Anatolia in some instances. Turkey, on the other hand, denies this claim and argues that islands either do not have or have little effect on determining exclusive economic zone based on previous decisions of the International Court of Justice. Turkey claims the continental shelf as an inherent right up to the medium line with Egypt. The Greek Cypriots base their arguments on mutual agreements with Egypt and Israel while disregarding the fact that Cyprus is an island. As a response, the TRNC claims exclusive economic zone based on self-defined geographical limits.

An Assessment of the Discourse and Dynamics

The lack of consensus among the countries surrounding the Eastern Mediterranean Sea escalates tension in the sharing of the natural wealth. The gas reserves, which could have eased the political tensions, deepened the disagreements. In this sense, the “Energy Bloc” of Israel, Greece, the Greek Cypriot administration, and Egypt

attempted to exclude Turkey and the TRNC from their share of the gas reserves. In such a case, the logical outcome could have been the realization of a win-win agreement and the exporting of Eastern Mediterranean gas to Turkey since the annual 53 bcm gas consumption of Turkey is a wise option to market the gas. Such an approach will also limit the Russian diffusion into the Turkish energy market as an alternative for Turkey's gas supply. But Turkey is disregarded both as a buyer of the gas or for transferring the natural gas towards other potential markets.

The United States and the European states have favored the arguments of the "Energy Bloc." In this context Greece and the Greek Cypriot administration have influenced the European policies by exploiting their membership in the EU and allocating licenses to the MNECs of Europe and the United States. By including Noble Energy, Israel included the United States' energy actors and industry to protect its interests in the region. Egypt, whose interests are actually downgraded by the Israelis and the Greek Cypriots, has focused on the gas reserves in proximity to the Egyptian coast. The ongoing dispute with Turkey pushed Egypt to handle the situation by aligning with a perspective that will not favor Turkey rather than favoring its own interests. A mutual agreement between Israel and the Greek Cypriots lessened the profits of Egypt within the delimited exclusive economic zone. The same applies to Israel and Lebanon.

If Turkish policy is assessed, it can be concluded that it was passive and reactive with the issuing of announcements and statements, and references to international law, until the EEZ memorandum of Libya and Turkey. Once the other parties started active gas production and ignored the Turkish interests, Turkey and the TRNC responded; first, by symmetric steps like declaring the continental shelf, search and drill activities, or military exercises to deny vessels access to the Eastern Mediterranean. The agreement with Libya, on the other hand, was a pre-emptive step to prevent calculations in the Eastern Mediterranean.

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2020?

The developments and current picture indicate that the so-called Energy Bloc will not take the Turkish interests into consideration but will insist on preserving the claimed rights. In this context, Turkey's gas exploration and extraction, if identified, will escalate both political and military tension in the Eastern Mediterranean Sea. The EU and the USA may focus on the already discovered gas reserves and provide support to the four countries' "Energy Bloc." Hence Turkey may be exposed to pressure, sanctions, and isolation as gas production continues on the already discovered gas reserves.

As far as the transfer of the generated gas to western markets becomes a point of concern, the tension may escalate more. The Turkey-Libya agreement on the delimitation of the exclusive economic zones will hinder the construction of a pipeline in accordance with international law. Then liquefaction of extracted gas in the Greek Cypriot part of the island of Cyprus or in Egypt may be an option for transferring gas other than constructing a pipeline route along Turkish territory. The increase in the costs may motivate the involved outer actors to either compromise with Turkey in order to build a pipeline reaching Europe via Anatolia or intensify the threatening words and actions.

The Turkey-Libya agreement has already brought to the surface a new issue that concerns Egypt and Israel. The exclusive economic zone agreements with the Greek Cypriots had limited the zones of these two countries, unlike those of Lebanon and Syria. As a course of action, these countries may search for an agreement with Turkey and gain more benefits by not favoring the Greek Cypriots since the narrow limitation of Greek Cypriot EEZ will maximize their benefits. Any course of action favoring Greece and the Greek Cypriots will escalate the tension while the priority could be toppling the legitimate regime in Libya in order to have the delimitation of exclusive economic zones of Turkey and Libya invalidated. Hence short-term reflections of the Eastern Mediterranean disputes may be experienced in Libya while mid-term outcomes would be the escalation of military tension unless a compromise is achieved. The discovery and/or extraction of gas by Turkey may be the decisive criterion for an armed confrontation.

TURKEY–U.S. RELATIONS: TOWARDS A CHALLENGING PATH

SUMMARY OF 2019

- The United States made an offer to Turkey for the sale of Patriot air defense systems on the condition that Ankara would give up on the S-400 deal with Russia.¹⁰⁰
- Turkey and the United States agreed on the creation of a safe zone to reduce the border security risk for Turkey. Following the agreement, a Joint Operation Center in Turkey was established to coordinate and manage the establishment of the safe zone.¹⁰¹
- Turkey launched a unilateral military operation called Operation Peace Spring following the failure of the implementation of the safe zone plan with the U.S. in order to eliminate the terrorist threat in northern Syria.¹⁰²
- Turkey and the U.S. agreed on a five-day pause in Turkey’s Operation Peace Spring while the U.S. facilitated the withdrawal of the YPG militia from the affected areas in the safe zone controlled by Turkey. Both sides agreed on 120 hours to allow YPG fighters to leave the area.¹⁰³

100. “US Makes an Offer to Turkey for the Sale of Patriot Missiles”, *Hurriyet Daily News*, January 03, 2019.

101. “Agreement with US on Syrian Safe-Zone ‘Very Good Start’”, Anadolu Agency, August 8, 2019.

102. “Operation Peace Spring Launched to Eliminate Terror Threats in Syria”, *Daily Sabah*, October 10, 2019.

103. “Pence Announces Syria Ceasefire Deal with Turkey”, *Politico*, October 17, 2019.

- President Erdoğan paid a visit to Washington, D.C. to meet President Trump at the White House to discuss bilateral relations.¹⁰⁴
- The Senate voted for the first time in the history of U.S.-Turkey relations to recognize the so-called Armenian genocide.¹⁰⁵
- The U.S. formally expelled Turkey from the U.S.-led F-35 fighter jet program after Turkey took delivery of the Russian-made S-400 missile system.¹⁰⁶

It should be mentioned that Turkey-U.S. relations experienced historic lows in 2019 even though the relationship on the leadership level was quite firm. It is believed that the relations between the two countries are tactically divergent but strategically convergent particularly vis-à-vis the Syrian crisis. However, the U.S. policy in the context of the fight against DAESH in northern Syria produces a strategic challenge for Turkey since the U.S. tactical approach to the YPG as its main local partner undermines Turkey's national security. Although Trump's changing approaches concerning the U.S. withdrawal from Syria and his willingness to cooperate with Turkey on regional level issues such as Iraq and Iran, the security landscape of Turkey in the context of Syria is heavily shaped by the YPG's presence and the United States' remaining military and political assistance to the YPG. Therefore, Syria is one of the vital components of the bilateral relations. The ambiguity in the U.S. foreign policy strategy is preventing the recalibration of the Turkish-U.S. cooperation on the regional level. In addition to the Syrian disagreement, Turkey-U.S. relations remain a challenge after Turkey took delivery of the Russian-made S-400 air missile defense system in late 2019. Turkey's preference to acquire the Russian-made air defense system did not emerge as a reaction to the U.S.-YPG cooperation in Syria, but maintaining the strategic aspect of the bilateral relations became a strategic challenge. In addition to Syria and the S-400, Turkey-U.S. relations have also been challenged by anti-Turkish legislation attempts in the Congress and the House.

104. Deb Riechmann, "US and Turkey Have Friendly Talks but Differences Persist", AP, November 14, 2019.

105. Catie Edmondson, "Senate Passes Resolution Recognizing Armenian Genocide, in Defiance of Trump", *The New York Times*, December 12, 2019.

106. Aimee Williams, "Trump Formally Expels Turkey from F-35 Programme", *Financial Times*, July 17, 2019.

DYNAMICS OF TURKEY-U.S. RELATIONS IN 2019

Syria and the PYD/YPG

Divergences towards Syria in general and the United States' tactical approach to the YPG in particular in the fight against DAESH are crucial components of Turkey-U.S. relations. In 2019, the U.S.-YPG cooperation in Syria continued to violate the Turkey-U.S. strategic partnership and undermined Turkish national security measures against the PKK and YPG. Turkey had to take unilateral military action to counter the multiple threats emanating from the YPG in Syria, to protect Syrian territorial integrity, and to provide a safe haven for the return of refugees to their homes. Following Trump's unexpected decision to withdraw the U.S. troops from northern Syria, the expectation of recalibrating the U.S.-Turkey relations over Syria and the YPG brought new dynamics to the Syrian war theater. However, the failure of the implementation of the safe zone road map pushed Turkey to launch Operation Peace Spring. While Operation Peace Spring provides Turkey freedom of maneuver and military action against the YPG in terms of minimizing its cross-border terrorist activities in Syria, the U.S. maintained its engagement with the YPG in the Syrian northeast – this inevitably continues to limit the U.S.-Turkey cooperation. Although, Turkey and the U.S. agreed on the safe zone and the withdrawal of the YPG forces from the regions held by the Turkish-backed Syrian National Army, Turkey's main objective concerning the deterritorialization of the YPG and minimizing its armed capacity remain crucial to bilateral relations.

There are two main problems that should be mentioned in regards to Turkish-U.S. cooperation in Syria. The first problem is the prioritization of Syria in both countries foreign policy agenda. While Turkey perceives Syria and the YPG as one of the important strategic challenges in its foreign policy, the U.S. administration lacks a strategic and tactical orientation vis-à-vis Syria. More importantly, the ongoing domestic debate regarding Syria in the U.S. destabilizes Turkey's ongoing commitment in Syria. More importantly, the U.S. strategic commitments in the Syrian northeast are directly linked to the objective of balancing Russia, containing Iran, preventing the Syrian regime from taking control of the SDG-held region, and maintaining a fight against DAESH in order to prevent its resurgence. However, Turkey's priority is different. The second problem is the lack of coordination between the two countries concerning tactical issues on the ground and the political attitude towards the Syrian future. While Turkey is trying to put into practice the Astana agreement in the context of preventing the Syrian regime's

full-scale military operation in Idlib, it seems that the U.S. has no comprehensive road map regarding Syria's future.

Anti-Turkish Legislation

The U.S. Congress witnessed quite a few numbers of anti-Turkish legislation efforts and introduced bills in 2019, ranging from preventing the transfer of F-35 aircraft and other arms to restricting financial and technical assistance to Turkey. The content of the anti-Turkish bills introduced to the Congress mainly concerned Turkey's S-400 acquisition, and Turkey's Syrian policy and natural gas exploration activities in the Eastern Mediterranean. The relationship between the two countries on the leadership level is of utmost importance in containing a crisis, but the impact of Congress over foreign policy is triggering a deepening of the bilateral crisis. In 2019, Turkey's military operation against the YPG in northeast Syria and the delivery of components for a Russian S-400 air defense system brought bilateral tension to a crisis level and contributed to the possibility of sanctions or other actions from Congress. The Trump administration imposed sanctions on some Turkish cabinet ministries and ministers in response to Operation Peace Spring, but lifted them upon announcing a permanent cease-fire on October 23. On October 29, the House passed the "Protect Against Conflict by Turkey Act (H.R. 4695)" by a vote of 403-16. The act could require the imposition of sanctions on some Turkish officials, U.S. and foreign arms transactions with Turkey, and Turkish financial institutions. On the same day, the House also passed a nonbinding resolution for the so-called Armenian genocide.

S-400 Acquisition

The Turkey-U.S. political tension over Turkey's acquisition of the Russian-made S-400 air missile defense system and the United States' move to remove Turkey from the F-35 program have a broad impact on bilateral relations and defense cooperation. Turkey began to take delivery of the S-400 system and the system will be fully deployed by April 2020. Two main dynamics regarding the S-400 are crucial. The first one is mutual decisiveness and the second is Turkey's potential counterreaction. While Congress is eager to impose sanctions against Turkey, Ankara is determined to operationalize the S-400 in late 2020. Turkey's potential counterreaction is another dynamic which may ultimately escalate the crisis. President Erdoğan's announcement regarding the reconsideration of Incirlik Air Base and Kürecik Radar Station as a reaction against the potential sanction which would be imposed against Turkey would be a real game-changer in Turkey-U.S. relations.

FIGURE 15: NATO AND THE U.S. MILITARY PRESENCE IN TURKEY



Source: Federation of American Scientists

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2020?

In light of the current tension points experienced in Turkey-U.S. relations within the past year, it is highly possible that the prevailing dynamics will determine the course of the bilateral relations in 2020. The Russian S-400 is arguably the most important area of conflict of interest in the bilateral relations. The Syrian and the U.S. cooperation with the YPG in Syria is another issue that might trigger a deep crisis. The YPG's ongoing terrorist activities in Syria might also trigger Turkey's next military move against the YPG in northeast Syria which ultimately will destabilize Turkey-U.S. relations. Anti-Turkish legislation in Congress is the final domain that might undermine future relations.

Taking the recent understanding between Ankara and Washington into account, particularly the strong leadership relations, the bilateral relations are expected to be challenged by multidimensional developments. The anti-Turkish legislation against Turkey's S-400 acquisition and large-scale sanctions might directly damage the bilateral relations. Even though the course of Turkey-U.S. bilateral relations is expected to become ambiguous and challenging from time to time, Ankara and Washington should carefully consider the reaction and counterreaction process to prevent pos-

sible strategic escalations over security issues. In the absence of a common threat or a larger shared objective, the abovementioned list of disagreements is likely to dominate the relationship in 2020. More importantly, the strategic dimension of the relationship will be likely challenged by the many different foreign policy preferences of both countries. Turkey's strategic move in Libya and the Eastern Mediterranean is another competing policy in bilateral relations. Therefore, the cooperation between the countries will be limited and contingent in 2020. This doesn't mean that the strategic dimension of the relationship is over but that it needs to be seriously reconsidered in the near future.

The United States' Syria Policy

The United States' strategic and tactical ambiguity in Syria seems to be the most critical factor of the U.S.-Turkey relations in 2020. Even though Trump himself seems determined to withdraw U.S. troops from the country, the Pentagon and CENTCOM will continue pushing for a pro-YPG agenda in Syria. More importantly, following Turkey's military operation against the YPG, the anti-Turkish atmosphere in Congress will be deepening which ultimately will cause the establishment of a strategy of reengagement with the YPG. In 2020, the U.S. administration on different levels will seek to consolidate its political gesture to empower the status of the PYD. Under the condition of the continuation of the U.S. military support to the YPG in Syria, it is not difficult to predict that Turkey's eagerness to implement its strategy to eliminate the YPG's military capacity will create potential tension in 2020. More importantly, the continuation of the United States' policy that attempts to normalize and legitimize the YPG will be a threshold for Ankara's short-term calculation in its relations with the U.S. Although, there is a great potential between the countries in the fight against DAESH, the divergences over the YPG will prevent cooperation in the short term and will eventually bring the risk of the regrouping of DAESH in Syria. The United States' strategic ambiguity and the institutional competition over the issue of the fight against DAESH under the Trump administration might also lead to an armed conflict between the Kurdish-led YPG and the Arab fractions in the SDF. This eventually might bring more risk to Turkey's stabilization efforts in the region and beyond.

Turkey's S-400 Acquisition

It is obvious that the compartmentalization in Turkey-U.S. relations is not possible as the structural dimension of the relations is well-established and strategic. Given the fact that Turkey will operationalize the S-400 in the middle of 2020, the struc-

tural dimension of the relations will be questioned by the U.S. While there seem to be no problems on the Russian side, Turkey's S-400 acquisition is likely to hinder Turkish-U.S. rapprochement mainly due to the CAATSA and the anti-Turkish tendencies in Congress. In order to overcome a potential crisis, Ankara and Washington need to keep their communication channels especially by establishing a technical committee to overcome the S-400 issue. Therefore, in 2020, defense cooperation between the two countries might be lower-level in terms of exchange of defense products. More crucially, a series of potential sanctions against Turkey might escalate the confrontation between the two countries. It is also obvious that Turkey's removal from the F-35 program can be quite costly and painful; the decisiveness of the U.S. decision-makers, however, shows that Turkey will not be part of the F-35 program in the near future. The contribution of the Turkish defense companies to the F-35s will be seriously questioned by the U.S. which will eventually terminate their contribution to the program. Regarding the Patriot sale to Turkey, it is difficult to expect that Turkey will accept the United States' offer or that the offer will be renewed under the condition of the operationalization of the S-400 and the sanction imposed on Turkey.

Extradition of FETÖ Members

The bilateral cooperation regarding FETÖ and the mutual extradition of criminals between Ankara and Washington is expected to gain momentum in 2020. Even though such processes take time due to differences in countries' criminal laws, through increased cooperation, we are set to see serious progress in 2020.

TURKEY–RUSSIA RELATIONS: FURTHER DEPEENING IN BILATERAL RELATIONS

SUMMARY OF 2019

- President Erdogan and President Putin reached a memorandum of understanding in Sochi on October 22, which entailed the YPG's complete withdrawal from the Turkish-Syrian border within a 10-kilometer depth under a joint monitoring framework of Turkey and Russia along with joint patrols.
- Erdogan visited MAKS 2019 International Aviation and Space Salon in Moscow on August 27, where President Putin showcased the Russian fifth generation Su-57 jet as well as the MC-21-300 jet passenger aircraft.
- Presidential spokesman of the Russian Federation Dmitry Peskov confirmed President Putin's participation in the launch ceremony of TurkStream in January 2020.
- In early December, Minister of Defense Hulusi Akar announced that Turkish officials were holding talks with their Russian counterparts for the potential purchase of a second fleet of S-400.

Turkish-Russian relations are experiencing a period of steady improvement since roughly mid-2016, notwithstanding a couple of bumps in the road. Bilateral relations are improving and both countries also find ways to work out their differ-

ences on issues which are not directly related to their bilateral relations such as Syria. The foundation of this working relationship was first laid out in the form of the Astana Process in January 2017 and the process is still continuing despite a number of difficulties. The Astana Process was also supplemented by subsequent “Sochi summits” between President Erdogan and President Putin. These summits were organized mostly to find solutions to the differences emerging on the ground in the Syrian theater and resulted in certain deals between the two parties.

Apart from the “third issues” that are not directly related to the bilateral relations, there are also considerable improvements in bilateral relations in many fields ranging from tourism and trade to energy and security. Especially energy and security come to the fore as the fields in the bilateral relations that are of strategic significance. Grand energy projects such as TurkStream, the Akkuyu Nuclear Power Plant (NPP), and the purchase of the S-400 missile defense system are the main elements of the significant cooperation between Turkey and Russia in the energy and security fields.

DYNAMICS OF TURKEY-RUSSIA RELATIONS

Syria

Syria is arguably the most important issue in the Turkey-Russia relations after the bilateral relations proper. There are several issues with regards to Syria such as Idlib, the Astana Process, and Operation Peace Spring, which are of common concern for both Turkey and Russia. Idlib is an uneasy area in Turkey-Russia relations, whose status was stipulated by an agreement reached by both parties in Sochi in September 2018. However, it is a precarious agreement since Russia helps the Syrian regime violate the ceasefire at times – many aerial and ground assaults were recorded between April and July 2019 - with the pretext of the presence of “terrorists” in Idlib. Within the framework of these assaults by the Syrian regime, opposition forces in Idlib lost considerable territories including the major towns in northern Hama and southern Idlib in 2019 resulting in large numbers of IDPs.

Operation Peace Spring (OPS) was the most considerable development in terms of Turkey's engagement in Syria in 2019; however, Russia's attitude towards OPS was not antagonistic as were the attitudes of the U.S. and European governments. Yet this does not mean that Turkey and Russia have the same perspective vis-à-vis the YPG and the safe zone in northern Syria. Russia simply stated its sympathy for Turkey's move and put the blame on the U.S. for the outcome.¹⁰⁷

107. “Russia Understands Turkey's Concerns over Border Security, Lavrov Says”, *Daily Sabah*, October 10.

Later, Turkey and Russia became the contracting parties of the Sochi memorandum, which was reached on October 22 and entailed clearing off the border areas between Turkey and Syria from YPG terrorists with the exception of Qamishli.¹⁰⁸ It also entailed joint patrols in the area between Turkey and Russia; the fifteenth one was conducted recently.¹⁰⁹

Energy

Energy is one of the main areas of cooperation between Turkey and Russia especially in terms of the TurkStream natural gas pipeline and Akkuyu NPP projects. The construction of Akkuyu NPP is underway as planned and the number of employees working in the construction is estimated to have reached 4,500.¹¹⁰ On the other hand, both lines of TurkStream, one of which is to serve Turkey and the other to serve Europe, are almost completed as of today.¹¹¹ So much so that Putin's participation in TurkStream's launch ceremony in the beginning of 2020 was confirmed by his spokesman Dmitry Peskov.¹¹² The launch ceremony is planned for January 8, 2020 and as of today, the commissioning process in the project has already started, which means that the project switched from the construction to operation phase.¹¹³

Defense

Defense is arguably the most strategic part of the Turkey-Russia relations in the form of the procurement of the advanced S-400 missile defense system. The delivery of the system to Turkey was fully completed in mid-September 2019 and the training of Turkish personnel by Russian specialists to operate the system is still ongoing.¹¹⁴ Moreover, the defense cooperation seems not to be limited to the delivery of the S-400 system this year. As confirmed by Minister of Defense Hulusi Akar, Turkey is currently in talks with Russia for a potential purchase of a second S-400 fleet and the head of Rosoboronexport Alexander Mikheev stated his expectation of this possible deal being sealed in the first half of 2020. However, this time, Turkey is seeking technology transfer, joint production and export, technology development, and

108. "Son Dakika: Rusya ile Tarihi Mutabakat! İşte 10 Maddelik Anlaşma", *Milliyet*, October 22, 2019.

109. "Turkish, Russian Troops Complete 15th Patrol in N Syria", *Daily Sabah*, December 12, 2019.

110. "Akkuyu Nükleer Santrali İnşaatı Görüntülendi", *Hürriyet*, July 23, 2019.

111. "Energy Minister: TurkStream Project to Be Completed by Year-End", *Daily Sabah*, November 17, 2019.

112. "Putin to Attend TurkStream Launch Ceremony in 2020", *Daily Sabah*, November 25, 2019.

113. "Countdown Begins for TurkStream Launch", *Daily Sabah*, December 10, 2019.

114. "S-400 Deliveries to Turkey Completed, New Deal under Discussion, Russia Says", *Daily Sabah*, October 23, 2019.

modernization instead of a mere purchase.¹¹⁵ Furthermore, both President Erdogan and Foreign Minister Cavusoglu indicated Turkey's intention to purchase Russian advanced military aircraft – such as Su-35 and Su-57- if the U.S. insists on not giving F-35 jets to Turkey.¹¹⁶

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2020?

Syria

Syria is going to remain the top issue between Turkey and Russia in 2020 especially with regards to the Sochi Memorandum and Idlib. Although high-level contacts between the presidents, foreign ministers, defense ministers, and chiefs of staff are continuing, the full withdrawal of the YPG from the areas both Turkey and Russia agreed upon has not materialized yet. High-level contacts will be maintained in 2020 between the two countries in order to ensure the complete withdrawal of the YPG; however, it is likely that the two countries will be led to a face-off if Russia fails to fulfil its responsibility. Russia would try to find a middle ground by searching for ways to reconcile the Syrian regime and the YPG, even incorporating the latter into the former, which would also create displeasure and frustration on the part of Turkey. In that case, Turkey would opt for resuming OPS by expanding the area of operation westward and eastward.

Likewise, Idlib is going to remain a central issue in Turkey-Russia relations in 2020. The Syrian regime undertakes intermittent assaults against Idlib in a desire to “take back” the territory and most of the time Russia supports those assaults. One should expect this to continue in 2020 as well, since there will be no considerable change in the current dynamics with regards to the motivations of both the Syrian regime and Russia.

Energy

Energy cooperation is going to continue in 2020 between Turkey and Russia without any disruption. The date of the launch ceremony of TurkStream has already been set and in the first half of 2020, gas flow from Russia to Turkey and Europe will probably be fully operational. Likewise, the construction process of Akkuyu NPP is going to be maintained in 2020 in line with the target of completing the power plant in 2023. Energy is arguably the safest field of cooperation between Turkey and

115. “Ankara Continues Talks for 2nd S-400 Fleet, Demands Tech Transfer, Joint Production”, *Daily Sabah*, December 11, 2019.

116. “Bakan Çavuşoğlu: F-35’leri Alamazsak Yeni Alternatifler Ararız”, *Hürriyet*, August 28, 2019.

Russia in terms of being almost immune to crises that impact the bilateral relations from time to time. Although Russia resorted to many harsh measures after its jet was downed by the Turkish Armed Forces, the grand energy projects such as Akkuyu NPP and TurkStream were not part of those measures and the respective processes were duly maintained. This pattern would be preserved throughout the 2020.

Defense

Defense cooperation between Turkey and Russia will continue in 2020 as well at least in the form of the maintenance of the existing defense ties such as the training of Turkish personnel by Russian specialists to operate the S-400 missile defense system. On the other hand, the prospect of the purchase of a second S-400 fleet will be dependent on how willing Russia is to share the technology and joint production of the system. Russia would agree to a partial share of technology with Turkey rather than a complete joint venture and this might make the second batch of purchase possible in 2020. It is also likely that Turkey will buy other air defense systems from Russia such as medium-range air defense systems in order to bolster its own air defense by supplementing the S-400. On the other hand, the prospect of buying Russian aircraft such as Su-35 and Su-57 is dependent on the U.S. reaction with regards to the delivery of the Turkish F-35s. If the U.S. rules out the delivery altogether, Turkey will seriously engage in talks with Russia for the potential purchase of a certain number of Su-35s. However, it should be noted that Turkey would be less enthusiastic about buying Russian aircraft than it was about buying the S-400 system, since the former requires a long period of training and adaptation of Turkish pilots as well as other associated transformation costs unlike the S-400's "ready-to-use" nature.

2020: A CHALLENGING YEAR FOR TURKEY

The *SETA Security RADAR* concluded that multitude political, military, and economic considerations significantly influenced Turkey's security and defense policies in 2019. It will not be surprising if the escalating tensions in the Eastern Mediterranean rise to a level that they pose the most serious contemporary challenge to Turkey's vital national security interests. The irresponsible behavior of the bloc formed by the Greek Cypriots, Greece, Israel, and Egypt in the Eastern Mediterranean is the major cause of concern that has escalated tensions in the region for years. Meanwhile, the Turkey-Libya maritime boundary delimitation deal has the potential to be a game-changer that can reshape the current balance in the coming term. Turkey's military engagement in the Libyan crisis would be an important geopolitical and strategic shift in Turkey's geopolitical landscape in 2020, if no compromise between the rivals is reached.

Turkey's increasingly assertive naval strategy will have a crucial role to play in the coming term, not only with providing the country with defense and deterrence but also being a tool to project power overseas. While the multipurpose amphibious assault ship *TCG-Anadolu* is expected to enter into the service by the end of 2020 could significantly enhance Turkey's power projection capabilities, we argue that Turkey's Blue Homeland naval drill symbolizes the country's considerations of its inter-

ests in the Eastern Mediterranean. We expect that the Blue Homeland will be one of the essential components in preserving Turkey's national interests in the region. On the other hand, Turkey's national efforts to build a stronger defense industry will continue to equip the TAF with advanced technologies while contributing to the country's defense and deterrence with sophisticated platforms. However, the Turkish defense industry will need to address key issues in the coming term regarding specialization in key sectors, finding export markets, and developing formulas to overcome political and foreign policy barriers.

Besides the conventional security issues, Turkey currently deals with security and stability operations, mainly concerning Iraq and Syria against the PKK. We argue that Turkey clearly holds operation and intelligence initiative over the terrorist group despite the United States' unmitigated support for it. We expect that Turkey will continue to deal with the PKK possibly with a higher operational tempo and with a focus on the targeted killings of alleged senior leaders of the terrorist group. On the other hand, the stabilization operations that Turkey will need to address in Syria with reconstruction efforts and paving the way for the voluntary return of Syrian refugees are of a completely different nature than the counterterrorism operations. The possibility of a second limited joint Turkish-Syrian military operation in northeast Syria remains a likely possibility as neither Russia nor the U.S. have delivered on their promises to withdraw the YPG, while both actors remain in conflict over the oil revenues.

Turkey-U.S. relations in the coming term may face new fierce tests regarding the completion of the formal removal procedure of Turkey from the F-35 program and Turkey's possible choice to purchase Russian aircraft, among others. While the U.S. Congress is pressing the Trump administration hard to adopt harsher policies against Turkey, it could be argued that the current good relationship between President Erdoğan and his counterpart Donald Trump will likely remain the essential balancing component against the increasingly assertive Congress. On the other hand, the negotiations on the Syrian conflict, energy trade, and the increasing defense cooperation will likely remain as the most pressing issues in Turkey's relations with Russia. Ultimately, Turkey's delicate balancing act between Russia and the U.S. is likely to significantly influence almost all pressing security issues in 2020.

In this work, by carefully examining the underlying dynamics, our team attempted to anticipate the evolution of Turkey's major security issues in 2020. The *SETA Security Radar* has tried to raise awareness among both policy-makers and interested researchers, to achieve a common understanding of the security prospects

that await Turkey in 2020, and to suggest ways in which the latter can be handled. Bearing this in mind, another major objective of the *SETA Security Radar* is to establish a bridge between Turkish decision-makers and the security studies community. Our team believes that this would pave the way for developing more defined and relevant security and defense policies.

SETA SECURITY RADAR

TURKEY'S GEOPOLITICAL LANDSCAPE IN 2020

As Turkish Parliament's recent approval of the motion that allows President to deploy Turkish troops abroad and the U.S.' targeted killing of Qassem Soleimani indicate 2020 will be a tough year in the Middle East. By carefully examining the underlying dynamics, SETA Security Radar attempts to anticipate the course of major security issues Turkey faces and how to develop and enhance sound and relevant responses within this increasingly challenging regional security environment.

