

SETA SECURITY RADAR

TÜRKİYE'S GEOPOLITICAL LANDSCAPE IN 2025

Mediating Opportunities in Global Uncertainties



Edited by
Murat Yeşiltaş
Bilgehan Öztürk

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Zeynep Bengü Çetindağ





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FOREWORD



Nebi Miş

SETA General Coordinator

The year 2024 was marked by key moments and changes that have pushed the international system toward a global unease. Nations and regions grappled with complex crises and their aftershocks. While the unresolved Russia-Ukraine war and the Israeli aggression in the Middle East continue to wage on, the NATO umbrella over the Baltic Sea, the incoming Trump administration and the fall of Syria's Bashar Assad regime, ongoing tensions in the Asia-Pacific and elsewhere culminated in a series of multifaceted dynamics that already **predefine 2025 as a year of uncertainty.**

This global uncertainty is amplified by the incoming second Donald Trump administration. The Biden administration's diplomatic but ambiguous policies left not only its voters but also their partners and rivals disgruntled. With the Republican party establishing a trifecta over the house, senate and presidency, the incoming administration holds significant leverage over Washington's agenda. Trump's second term is anticipated to reflect the distinct characteristics of his first, marked by **pragmatic unpredictability.** The strategic pivot toward Asia initiated under Barack Obama and accelerated during Trump's first term, continued under the Biden administration. Building on this progress, Trump may reinvigorate the U.S. re-posturing in the Middle East and Europe toward the Asia-Pacific. However, his stance and commitment to vital issues, including NATO, transatlantic alliances and the U.S. role in the Middle East, remain a mystery and may create decisive ripples for global stakeholders.

The conclusion of the 14-year Syrian civil war has marked the end of this devastating conflict, fundamentally altering Middle East's regional political landscape. The fall of the Assad regime ended a dynasty of tyranny, repression and bloodshed but also left behind a nation uncertain about its future while also struggling with consequences of the war. Remnants of the Assad regime, radical militants and separatists pose a threat to Syria's lasting stability and sovereignty. The fate of millions of refugees that escaped the bloodshed remains a pressing and contentious issue among host countries. With the civil war concluded, there is an opportunity for Syria to stabilize, reconcile and rebuild. International cooperation and regional support will be crucial in ensuring a stable and sustainable future for the country.

Throughout 2024, the Israeli genocide of the Palestinian people continued, with expansionist ambitions impacted Lebanon, Yemen, and Syria. The fall of the Assad regime allowed Israel to seize additional Syrian territory, breaking existing cease-fires, while southern Lebanon saw renewed occupation. These actions, coupled with the ongoing Russia-Ukraine war, have added to global instability. Although cease-fires between Israel and Lebanon, and ongoing negotiations with Hamas, suggest possible incoming stability, the risk of renewed conflict with greater intensity remains high.

Türkiye emerges not just as a convergence point of these global uncertainties, but also as a mediator of opportunities, bearing a central role in providing security and stability on the international stage. Over the past years the normalization of her relationships has **evolved into forging strong, cooperative ties with its neighbors and partners**. Beyond this, **Türkiye has encouraged and ensured strong neighborly cooperation wherever needed**. Its nuanced efforts in the Southern Caucasus, Middle East and East Africa have been decisive in navigating complex relationships while discouraging escalation and fostering stability. As it has done so far, Türkiye will continue to lead efforts to build an inclusive, just, orderly, and sustainable Syria based on its territorial integrity, both through diplomacy and by directly contributing to the country's reconstruction and rebuilding. The end of the Assad regime also provides an opportunity to resolve the terrorist threats emanating from Syria.

Considering these dynamics as the foundation, the Turkish-American relations and the Trump administration plans will play a central role in shaping Türkiye's foreign, security, and defense policies in 2025. Furthermore, developments spanning Syria, the Middle East, the Southern Caucasus, Europe, and Africa will have to be closely monitored as well.

The SETA Security RADAR: 2025 seeks to examine the geopolitical landscape of Türkiye and its implications and make predictions on its trajectory for the upcoming year. I extend our deepest gratitude to the foreign policy team and all the writers whose invaluable contributions and insights have made this analysis possible.

INTRODUCTION



Murat Yeşiltaş



Bilgehan Öztürk

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SUMMARY OF 2024

- 1 Geopolitical Landscape in 2025: Türkiye faces intensifying global uncertainties, including U.S.-China competition, Middle East conflicts, and regional instability in Ukraine, Syria, and Gaza,
- 2 Foreign and Security Policy Themes: Strategic adaptability, resilience, and proactive diplomacy define Türkiye's approach, emphasizing mediation, counterterrorism, and regional stability,
- 3 Counterterrorism Strategy: Türkiye adopts a comprehensive approach, combining military operations, intelligence-driven strategies, and international cooperation to counter threats from PKK/YPG, Daesh, and other groups, particularly in Syria and Iraq,
- 4 Strategic Partnerships: Balancing ties between NATO and non-Western powers, Türkiye pursues pragmatic engagement with the EU, Russia, and African nations to strengthen its geopolitical and economic influence,
- 5 Defense Modernization: Türkiye focuses on unmanned systems, naval capabilities, and NATO-standard platforms while expanding defense exports to Asia-Pacific and Africa.

MEDIATING OPPORTUNITIES IN GLOBAL UNCERTAINTIES: TÜRKİYE'S FOREIGN AND SECURITY POLICIES IN 2025

Türkiye enters 2025 facing an increasingly complex and uncertain geopolitical landscape, marked by escalating global geopolitical rivalries, regional conflicts, and structural disruptions in its geographical vicinity. Against this backdrop, Türkiye's foreign and security policies are shaped by crisis management, strategy of resilience, adaptability, and proactive diplomacy. This year's theme, "Mediating Opportunities in Global Uncertainties," highlights Türkiye's efforts to transform challenges into diplomatic and strategic opportunities amidst global and regional instability.

The return of Donald Trump to the U.S. presidency intensifies uncertainties surrounding global governance, alliances, and multilateralism. While Trump's foreign policy approach may revive transactional diplomacy and unilateralism, it also poses potential risks for Türkiye's hedging strategies. Trump's recent statements on Canada, Panama, and Greenland, and his approach to other world affairs, are examples of how global politics is fraught with risks in the Trump era. The competition between the United States and China is expected to deepen, further fragmenting the international system and limiting Türkiye's maneuvering space in the international arena. At the same time, the Middle East remains volatile, with unresolved crises in Gaza, Lebanon, Syria, and Ukraine, alongside rising military tensions between Israel and Iran.

In this new volume of Security RADAR, we outline Türkiye's foreign and security policy visions for 2025, focusing on four key geopolitical conflicts – Ukraine, Gaza, Syria, and Israel-Iran – and provide in-depth strategic analysis to anticipate Türkiye's potential course of action and strategic approach vis-à-vis critical foreign and security issues. Since the first volume of Security RA-



Türkiye is a country that cannot be squeezed into a single bloc due to its geographical, human, economic, and historical ties. We cannot allow anyone to imprison us in their own narrow form. We neither turn our backs on the East for the West nor neglect the West for the East.

President Recep Tayyip Erdoğan/16.07.2024

DAR, we saw that Türkiye has been recapitalizing its geopolitical position and strategic role in its geopolitical landscape. In 2025, it will be highly likely that Türkiye's geopolitical position and diplomatic capabilities uniquely position it to act as a mediator and stabilizer in an era of uncertainty particularly in the Middle East region where uncertainty is more visible. In the post-Bashar Assad Syria and the Middle East, Türkiye will likely leverage its regional influence, seek to secure its national interests in the context of Syria and Iraq in the fight against terrorism, improve defense industry capacity to calibrate its military posture while promoting regional stability and cooperation.

This year's issue of Security RADAR will focus on global and regional uncertainties. In an environment of increasing and ambiguous global and regional uncertainties, we believe that the geopolitical environment, of which Türkiye is a part, will have a dynamic, competitive, and confrontational character. While a dynamic environment will lead Türkiye to be flexible and pragmatic in its foreign and security policy, the competitive geopolitical environment will require Türkiye to calibrate its strategic capabilities. In a confrontational environment, Türkiye needs to consolidate its military power and have the autonomy to act unilaterally when necessary. As in any uncertain environment, the risks and challenges are diverse for Türkiye. Therefore, in this year's Security RA-

DAR, we believe that Türkiye is inclined to act with a strategy that can turn uncertainties into opportunities.

GLOBAL UNCERTAINTIES

One of the most important features of the current international system is *the return of great power competition* in which states have intense geopolitical rivalries over the control of strategic locations, security, and technological power to gain strategic leverage. The strategic rivalry between the U.S. and China is dominating global politics, shaping alliances, economic competition, and the global tech race which eventually produces a competitive international environment for the states. On the other hand, the restrictive international environment created by the U.S.-China rivalry poses structural challenges for regional actors, including Türkiye. Trump's policies are likely to amplify these

pressures, forcing allies to adopt transactional relationships with Washington. This dynamic could result in two broad options for the states in the globe. Allies might align closely with U.S. policies to maintain bilateral relations and security guarantees. Türkiye could opt for this approach selectively, particularly in NATO and defense cooperation, while safeguarding its strategic autonomy. Alternatively, U.S. allies could form *ad hoc* coalitions to mitigate Trump's unpredictability, focusing on regional security frameworks and multilateral initiatives without alienating Washington.

Türkiye's response will be shaped by its ability to balance NATO commitments with its independent foreign policy and relations with non-Western powers in different regions. While China and Russia seem to be the main strategic options for Türkiye, Ankara has multiple geopolitical alternatives to diversify its global foreign outlook to calibrate its rising global actorness.

“Türkiye is a country that cannot be squeezed into a single bloc due to its geographical, human, economic, and historical ties. We cannot allow anyone to imprison us in their own narrow form. We neither turn our backs on the East for the West nor neglect the West for the East.” President Recep Tayyip Erdoğan/16.07.2024

While the strategic rivalry between the United States and China dominates the global geopolitical landscape, another pressing issue emerges – *the uncertain future of the international order*. The tension between a new bipolarity, driven by U.S.-China competition, and a rising multipolarity, fueled by the growing influence of middle powers in global politics, generates strategic uncertainty. This uncertainty, in turn, fosters a more competitive international system. As middle powers strive to realign their economic and military positions, the global order continues to shift toward multipolarity. Multipolarity is emerging as a response from middle powers to establish an alternative international order, challenging the dominance of the U.S.-China-centric system. As part of the competition over the quest for a multipolar global system, on the other, *Russian influence is declining*. Following the geopolitical setbacks in Ukraine and the potential strategic loss of influence in the Middle East in the geopolitical context of post-Assad Syria, Russia may focus on safeguarding its regional interests in its “near abroad.” However, the geopolitical and geostrategic implications of Russia's decline carry significant strategic ramifications, further fueling uncertainty across Europe, Central Asia, the Black Sea region, and several other critical areas.

The *evolving international security landscape and shifting security paradigms* are further manifestations of global uncertainties. The changing nature and hybridization of warfare have reshaped non-conventional security threats, including cyberattacks, disinformation campaigns, economic coercion, and

technological advancements. Both state and non-state actors' responses and adaptations to this emerging security environment intensify uncertainties, ultimately heightening the prospects of assertive competition in global politics.

Global climate change must also be considered a key component of global uncertainties due to the unequal capacities and capabilities of state actors in addressing climate-related environmental challenges. Intensified competition over water and energy resources in regions such as the Middle East, Africa, and the Arctic, further exacerbates these challenges. Simultaneously, the lack of state and societal resilience in responding to climate crises heightens the risk of local and regional conflicts, particularly in Africa and the Middle East, thereby amplifying climate-related uncertainties in global politics. Moreover, international organizations often fail to effectively respond to or support fragile states in vulnerable regions, further deepening instability and leading to greater strain on Europe and regional states like Türkiye.

REGIONAL UNCERTAINTIES: MIDDLE EAST AND BEYOND

Türkiye's geopolitical uniqueness is defined by its position within a multi-regional super-geopolitical complex. It occupies a central role in the land-based geopolitics of Europe, the Balkans, the Middle East and North Africa, the Caucasus, and Central Asia, while also holding a critical strategic position in the maritime geopolitics of the Eastern Mediterranean, the Aegean Sea, and the Black Sea. Over the past decade, the expansion and deepening of Türkiye's foreign policy portfolio have enabled it to pursue national interests that extend beyond its immediate land and maritime spheres.

Türkiye faces simultaneous strategic challenges due to global power rivalries and regional crises, compounded by numerous geopolitical uncertainties. The ongoing war in Ukraine has further amplified these uncertainties, requiring Türkiye to account for the European security architecture, the shifting security dynamics of the Black Sea, the fragile security environment in the South Caucasus, and potential vulnerabilities in the Balkans.

Meanwhile, Türkiye's evolving power profile and mediation efforts in East Africa present new opportunities while diversifying its risk portfolio. At the same time, the regional impacts of global systemic competition may prompt Türkiye to re-evaluate its regional priorities and influence its strategic engagements in the African continent.

“Today, we face a variety of challenges: intertwined threats, competing conflicts, terrorism, irregular migration, xenophobia, Islamophobia, the climate

crisis, and cyber threats. The inability of international organizations to find solutions to all these problems increases the complexity and uncertainty in the global environment. This uncertainty is leading to deepening polarization and increased competition among great powers. This situation brings regional and global tensions to even more dangerous levels". Turkish Foreign Minister Hakan Fidan/ 09.12. 2024

Regional instability in the Middle East remains a defining feature of Türkiye's security landscape. More importantly, it is a strategic litmus test for Ankara's growing geopolitical influence and regional actor role. The Middle East will likely achieve a fragile "calm" with Trump's pressure on many actors, allies and foes alike. Pressure and decisive military engagements are likely to be used against Iran and its proxies such as the Houthi rebels. Likewise, pressure and persuasion will be employed toward all allies in the region to embrace an Abraham Accords-based new regional status quo. This means the completion of Israeli normalization with Arab countries, including Saudi Arabia. Gaza could be ruled by the Palestinian Authority in the new status quo, with northern Gaza being separated from the south and strictly monitored by Israel's military presence and private surveillance companies with some "humanitarian" aspects and mandates. This mode of governance in Gaza would secure the financial and political support of the GCC countries, probably except Qatar.

Türkiye faces the dual challenge of adapting to this evolving order while managing conflicts in Gaza, Syria, and Lebanon. Trump's emphasis on containment strategies against Iran may escalate regional tensions, increasing the likelihood of proxy wars and military confrontations. Simultaneously, the Syrian conflict continues to test Türkiye's security priorities, particularly concerning the PKK/YPG presence. Türkiye's strategy will likely combine military deterrence with diplomatic engagement to address these issues.



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***Turkish Foreign Minister
Hakan Fidan/ 09.12. 2024***

TABLE 1 TÜRKİYE'S GEOPOLITICAL LANDSCAPE IN 2025

Regions	Main Geopolitical Dynamics	Geopolitical Trends in 2025	Potential Impact on Türkiye's Geopolitical Landscape
Middle East	<ul style="list-style-type: none"> - Post-Assad Syria - Assertive Israeli-military engagements - Israel-Iran military escalation 	<ul style="list-style-type: none"> - Military escalation - Geopolitical competition - Proxy conflict - Arab-Israel realignment - Assertive U.S. security dominance - Search for realignment 	<ul style="list-style-type: none"> - Restrictive and competitive security environment
Europe	<ul style="list-style-type: none"> - Prolonged conflict in Ukraine - Strategic ambiguity in transatlantic relations 	<ul style="list-style-type: none"> - Military escalation - Continental armament - Geopolitical divergencies - Return of strategic autonomy 	<ul style="list-style-type: none"> - Competitive and conflictual geopolitical environment
Africa	<ul style="list-style-type: none"> - Competition between external actors - Military escalation among the regional countries (zones of conflict) - External intervention 	<ul style="list-style-type: none"> - The failure in mediation efforts - Military escalation - Proliferation of non-state armed groups 	<ul style="list-style-type: none"> - Unstable security landscape
South Caucasus	<ul style="list-style-type: none"> - Post-Karabagh regional politics - Protests in Georgia - Normalization 	<ul style="list-style-type: none"> - Slow but steady normalization - Partial regionalization 	<ul style="list-style-type: none"> - Fragile regional status quo

TÜRKİYE'S FOREIGN AND SECURITY POLICIES IN 2025

Türkiye's foreign and security policies in 2025 are characterized by strategic adaptability, pragmatic engagements, and an emphasis on regional stability amid increasingly volatile regional and international politics. Türkiye, as a pivotal state at the nexus of Europe, Asia, and the Middle East, continues navigating systemic competition, evolving security threats, and shifting alliances while asserting its strategic autonomy and safeguarding its national interests.

The global geopolitical environment in 2025 is marked by intensifying great power competition, particularly between the United States and China, the ongoing Russia-Ukraine war, and the deepening instability in the Middle East. Türkiye's growing emphasis on balancing global partnerships while maintaining regional stability highlights its proactive and multifaceted foreign policy approach.

Türkiye faces growing uncertainty stemming from the return of Donald Trump to the U.S. presidency. While his administration's focus on bilateralism

and strategic pragmatism offers avenues for enhanced defense and economic cooperation, long-standing disputes, particularly over the U.S. support for the PKK/YPG in Syria, continue to test bilateral ties. Türkiye's approach toward the U.S. in 2025 reflects a delicate balance of maintaining constructive engagement while preserving its security interest, especially in the Middle East region. It is highly likely that Türkiye's repositioning of its foreign and security policies in post-Assad Syria will be the most significant foreign policy issue between Türkiye and the U.S. although several potentials of opening a new chapter in the bilateral relations between Washington and Ankara.

In parallel, Türkiye's relationship with the European Union remains complex and transactional. Although trade and defense cooperation persist, Türkiye's EU accession process has remained stagnant. The lack of progress on institutional reforms and the Customs Union modernization underscores the difficulties in moving beyond a functional partnership. However, Türkiye's contributions to emerging European security and defense architecture, particularly through NATO and its bilateral engagement with European countries, highlight areas of alignment and shared strategic priorities. More importantly, Türkiye's geopolitical leverage that has gained with the fall of the Assad regime in Syria will likely provide a new strategic opportunity to revitalize Türkiye-EU relations.

Türkiye's relations with Russia in 2025 are shaped by a dual-track approach that balances strategic cooperation with indirect restraint. While economic and energy ties remain central to their bilateral agenda, Türkiye's geopolitical priorities and NATO commitments necessitate a cautious and pragmatic engagement with Moscow. In Syria, the collapse of the Assad regime has created new dynamics. Russia's gradual withdrawal and weakened influence in the region have allowed Türkiye to expand its role, particularly in stabilizing post-Assad governance structures. Türkiye's support for opposition forces and efforts to counter PKK/YPG elements highlight its strategic divergence from Moscow, despite ongoing diplomatic coordination. The Ukraine conflict also remains a focal point in Türkiye-Russia relations. Türkiye's enforcement of the Montreux Convention, restricting naval movements in the Black Sea, demonstrates its commitment to NATO while maintaining open communication with Russia to mediate regional tensions. Türkiye's provision of drones and other military technologies to Ukraine has strained ties with Moscow but underscores Ankara's independent foreign policy approach.

“In a geography full of uncertainties where everyone makes different strategic calculations, where it is not clear who will benefit from these strategic interests and when and where, and where different games are played, Türkiye's 13-year policy of strategic patience, wisdom, great determination, and care

has evolved to a different point as of today.” Turkish Foreign Minister Hakan Fidan/10.12.2024



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**Turkish Foreign Minister
Hakan Fidan/10.12.2024**

Türkiye remains a cornerstone of NATO’s southeastern flank, playing a vital role in deterring threats from Russia and stabilizing the Middle East. In 2025, NATO focuses on enhancing its readiness due to the ongoing Russia-Ukraine war and uncertainties in regions like the Indo-Pacific and Africa. Türkiye’s strategic location

places it at the heart of NATO’s surveillance and rapid response capabilities, bolstering the alliance’s deterrence posture. Türkiye has expanded its contributions to NATO operations, including hosting major exercises such as *Steadfast Defender 2024* and assuming command of NATO’s Standing Maritime Group 2 (SNMG-2). Its operational readiness and ability to mobilize forces in high-intensity conflicts underscore its role as a key NATO ally. Türkiye’s defense expenditures, amounting to 2.09% of its GDP, demonstrate compliance with NATO’s defense spending benchmarks while emphasizing cost-effective, domestically produced defense systems. Investments in advanced technologies, including artificial intelligence, cyber defense, and unmanned systems, further enhance Türkiye’s deterrence and readiness against hybrid threats. Türkiye also actively supports NATO’s adaptation to emerging challenges, including cyber threats, climate-related security risks, and maritime security in the Black Sea. Its collaboration with NATO allies like Romania and Bulgaria to form the Black Sea Mine Countermeasures Task Group (MCM Black Sea) highlights Türkiye’s commitment to regional security and crisis management.

Türkiye’s regional engagements in 2025 are shaped by shifting power balances, conflicts, and efforts to promote stability. Syria will be the most important foreign and security issue for Türkiye in 2025. In 2025, Türkiye’s foreign and security policies toward Syria will focus on stabilizing the region following the collapse of the Assad regime. Türkiye aims to support the newly formed transitional government by consolidating centralized authority, dismantling the PKK/YPG’s presence, and preserving Syria’s territorial integrity.

Prioritizing counterterrorism, Ankara seeks to eliminate separatist threats while fostering regional diplomacy through alliances with the Arab League,

OIC, and GCC to promote economic recovery and security. Türkiye's proactive approach also emphasizes multilateral engagement with global actors like the U.N. and EU to secure legitimacy for Syria's reconstruction. However, challenges remain, including potential PKK/YPG resistance, regional rivalries, and economic strains. While Türkiye may pursue cooperative solutions if the YPG agrees to lay down its arms and integrate into the transitional process, Ankara will highly likely employ military force should the group resist disarmament and continue to pose a threat to Syria's stability and Türkiye's national security.

“The alternative to Western-centered concepts is not and should not be another ethnocentrism. The geopolitical tensions between the West and the non-West are rooted in the fact that they have yet to come up with a vision of order on which they can agree. This uncertainty in the international system leads to the diversification of hybrid and asymmetric threats and the emergence of a global legitimacy crisis.” Director of National Intelligence Agency/ İbrahim Kalın/10.01.2024

In 2025, Türkiye's foreign policy regarding potential aggression in Gaza and beyond will focus on preventing further escalation, advocating for Palestinian rights, and promoting a two-state solution. Türkiye is likely to strengthen its mediation efforts, working with Egypt, Qatar, and Saudi Arabia to push for a cease-fire and support reconstruction in Gaza. Ankara will also use multilateral platforms such as the U.N. and the OIC to increase international pressure on Israel to halt its expansionist policies and human rights violations. However, Syria may emerge as a zone of conflicting interests between Türkiye and Israel, especially following the collapse of the Assad regime. Türkiye's support for Syria's transitional government and its commitment to eliminating PKK/YPG elements could clash with Israel's security-driven interventions and its backing of groups opposed to Türkiye's influence. This divergence could intensify regional tensions, with Türkiye prioritizing Syria's territorial integrity and counterterrorism, while Israel might pursue strategies that challenge Türkiye's efforts to stabilize Syria and assert its influence in the region Türkiye's cautious engagement with Iran



The alternative to Western-centered concepts is not and should not be another ethnocentrism. The geopolitical tensions between the West and the non-West are rooted in the fact that they have yet to come up with a vision of order on which they can agree. This uncertainty in the international system leads to the diversification of hybrid and asymmetric threats and the emergence of a global legitimacy crisis.

Director of National Intelligence Agency/ İbrahim Kalın/10.01.2024

reflects its efforts to balance competition and cooperation. While opposing Iran's militarization and regional interventions, Türkiye rejects sanctions and prioritizes stability through diplomatic channels. The collapse of the Assad regime and Iran's weakened position have opened new opportunities for Türkiye to counter Iranian influence in Syria and the broader region. However, Iran's withdrawal from Syria and the weakening of its influence could lead Iran to support asymmetric elements against Türkiye in Syria, which could lead to a confrontational rivalry between Ankara and Tehran.

In 2025, Türkiye's foreign policy in Africa will focus on expanding economic partnerships, defense cooperation, and humanitarian diplomacy to strengthen its soft power and diversify alliances beyond the Middle East. Türkiye's growing trade, infrastructure investments, and defense collaborations position it as a strategic partner for African development, particularly in the energy, transportation, and security sectors. Ankara also seeks to enhance its diplomatic footprint through mediation efforts, including facilitating dialogue between Somalia and Ethiopia over maritime disputes and positioning itself as a potential peace broker in Sudan to resolve ongoing conflicts. However, Türkiye faces challenges such as competition with global powers like China, France, and Russia, as well as risks from political instability and terrorism in certain regions.

In 2025, Türkiye's counterterrorism policy will prioritize a comprehensive approach, combining military operations, intelligence-driven strategies, and international cooperation to address threats from groups like the PKK/YPG and Daesh, particularly along its borders with Syria and Iraq. Ankara will enhance border security, deploy advanced surveillance technologies, and target terrorism financing networks to disrupt militant activities. While leveraging partnerships with NATO, Interpol, and regional actors for intelligence sharing, Türkiye is also prepared to act unilaterally against terrorist threats if diplomatic solutions prove insufficient. Additionally, Türkiye will focus on stabilizing post-conflict areas through counter-radicalization programs and reconstruction efforts, aiming to prevent extremist resurgences and reinforce regional stability. However, Türkiye faces potential risks and challenges, including continued U.S. support for the PKK/YPG, regional instability stemming from Syria's transitional process, and the resurgence of terrorist cells exploiting power vacuums. Balancing diplomatic engagements with decisive military actions while navigating regional rivalries will be critical for Türkiye's counterterrorism success.

Türkiye's defense policy in 2025 is expected to emphasize technological advancements, strategic partnerships, and expanded maritime capabilities. Building upon progress in 2024, Türkiye will continue modernizing its air

force with 4.5-generation fighter aircraft, such as the F-16s and potentially Eurofighter Typhoons, highlighting its preference for NATO-standard platforms despite earlier speculation about Russian alternatives. Türkiye's naval diplomacy is set to grow, supported by investments in frigates, submarines, and unmanned naval vehicles, aiming to boost its regional and global maritime presence. The Black Sea Mine Countermeasures Task Group (MCM Black Sea) underscores Türkiye's commitment to regional security following instability caused by the Russia-Ukraine war. While fostering bilateral defense ties with NATO members, including Germany, Spain, and the U.K., Türkiye faces challenges like EU restrictions on defense exports and delays in aircraft deliveries due to global supply chain issues. Türkiye's defense exports are also expected to grow, targeting markets in the Asia-Pacific and Africa, further cementing its position as a key arms supplier. However, balancing its ambitions with budgetary constraints and regional tensions will remain a critical challenge for 2025.

The 2025 edition of SETA Security RADAR, analyzes Türkiye's evolving foreign, security, and defense policies within the context of a shifting geopolitical landscape. Focused on the challenges and opportunities Türkiye faces in 2025, it highlights Ankara's strategic responses to regional conflicts, great power competition, and defense modernization. The report also examines Türkiye's defense industry advancements, including investments in unmanned systems, air defense technologies, and naval capabilities, underscoring its pursuit of strategic autonomy while maintaining commitments to NATO and fostering partnerships with Africa and Central Asia.

Moreover, it evaluates Türkiye's role in addressing post-Assad Syria, mediating conflicts such as Somalia-Ethiopia and Sudan, and navigating tensions in Gaza while positioning itself as a regional stabilizer. Türkiye's counterterrorism efforts, against PKK/YPG threats, and its strategies to balance relations between Russia and NATO are analyzed as key aspects of its security framework.

This edition sheds light on Türkiye's approach to mitigating economic constraints, strengthening defense exports, and leveraging diplomatic influence to shape the regional and global security order in 2025.

TÜRKİYE-U.S. RELATIONS: Pragmatism and Continuity*



Murat Yeşiltaş

02

* I would like to express my sincere thanks to Zeynep Bengü Çetindağ for her valuable contribution, particularly to the data collection and writing process of this chapter.

SUMMARY OF 2024

- 1 **PKK/YPG Support:** The United States' continued support for the PKK/YPG terrorist group in Syria remained the most critical issue in bilateral relations. Türkiye considered this support a threat to its national security and continued its military operations.
- 2 **F-16 Sale and Sweden's NATO Membership:** Türkiye's approval of Sweden's NATO membership paved the way for the U.S. Congress to approve the sale of F-16s to Türkiye. These developments strengthened pragmatic cooperation.
- 3 **Gaza Conflicts:** Israel's attacks on Gaza and the U.S.' unconditional support for Israel led to differences of opinion between Ankara and Washington in terms of regional policies.
- 4 **Russia-Ukraine War:** Türkiye, while following a policy of balance and maintaining its communication with both Russia and Ukraine, continued to face a U.S. stance of strict sanctions against Russia and military support for Ukraine.
- 5 **Trump's Election Victory:** Donald Trump's victory in the presidential election is regarded as the beginning of a new era for 2025. The personal relations between Erdoğan and Trump at the leadership level could be a positive factor in ties.
- 6 **Pragmatism and Continuity:** Despite differences between the two countries, Türkiye preferred to keep diplomatic channels open with the United States and pursued a process of strategic and pragmatic cooperation.

2024: CONTINUITY IN TÜRKİYE-U.S. RELATIONS

Introduction

The year 2024 stands out as a period where the persistent issues in Türkiye-U.S. relations were reshaped and occasionally intertwined with new opportunities. Bilateral relations experienced developments that were a continuation of previous years. As such, the Ankara-Washington relationship experienced a calmer period in 2024 after being intensely debated in 2023, particularly regarding Türkiye's approval of Sweden's NATO membership and the passage of the F-16 fighter jet deal through the U.S. Congress. Although establishing a direct link is not entirely possible, Türkiye unblocking Sweden's NATO membership overcame congressional obstacles in the U.S., paving the way for the F-16 sale. This represented a pragmatic approach in Türkiye-U.S. relations, as in previous years, where cooperation was achieved despite differences of opinion. In terms of leader-to-leader diplomacy, diplomatic contacts between the two presidents were limited throughout 2024. Indeed, no bilateral meetings were held on the margins of the United Nations (U.N.) 79th General Assembly in September¹ or the NATO Leaders' Summit in Washington in July.² Throughout the year, contacts occurred through only a limited number of phone calls.

When it comes to regional developments, a critical pillar of Turkish-American ties, Israel's war on Gaza which began on Oct. 7, 2023, and continued

1 "Cumhurbaşkanı Erdoğan ABD'ye Gitti", T.C. Cumhurbaşkanlığı İletişim Başkanlığı, 21 Eylül 2024, <https://www.iletisim.gov.tr/turkce/haberler/detay/cumhurbaskani-erdogan-abdye-gitti-21-09-24>, (Access Date: 10 December 2024).

2 "Cumhurbaşkanı Erdoğan NATO'nun 75. Yılı Anma Etkinliğine Katıldı", T.C. Cumhurbaşkanlığı İletişim Başkanlığı, 21 Eylül 2024, <https://www.iletisim.gov.tr/turkce/haberler/detay/cumhurbaskani-erdogan-natonun-75-yili-anma-etkinligine-katildi>, (Access Date: 10 December 2024).

into 2024, along with the fluctuating course of the Russia-Ukraine war, have forced the two countries to adopt differing approaches in determining regional priorities. The Biden administration's unconditional support for Israel, and Türkiye's balanced policy – aimed at stopping the conflict and protecting the rights of the Palestinian people – have remained a critical dynamic between the two allies. Regarding the Russia-Ukraine war, while Türkiye has continued to pursue a policy of balance by keeping diplomatic channels open with both Russia and Ukraine, the U.S. has maintained its harsh sanctions against Russia and its comprehensive military support for Ukraine. Despite their differences of opinion on both regional issues, Türkiye and the U.S. have sought to sustain their cooperation through pragmatic approaches. They co-chaired the seventh U.S.-Türkiye Strategic Mechanism Meeting held in Washington on March 7-8, 2024. The meeting discussed issues such as the Eastern Mediterranean, trade and economic cooperation, defense and security, as well as Gaza and the Russia-Ukraine war. It emphasized strengthening bilateral relations and a commitment to increasing cooperation to address global challenges.³

Like previous years, however, the U.S.' continued support for the PKK/YPG was the primary issue that negatively affected its relations with Türkiye. Washington's support for the PKK/YPG terrorist group continues to disrupt the balance in Türkiye-U.S. relations. While Türkiye continues resolutely its fight against terrorism – in line with its national security concerns – the U.S. continues to view the YPG as a local partner in Syria, citing the fight against Daesh (ISIS) as justification. U.S. Congress allocated \$156 million to the Syria section⁴, which also benefits the PKK/YPG terrorist organization, in the 2024 defense budget negatively affected Ankara-Washington ties.

Donald Trump winning the U.S. presidential elections on Nov. 5 and returning to the White House, will play a pivotal role in Türkiye-U.S. relations. While Trump's handling of relations with Türkiye in his second term remains a topic for discussion in 2025, the leader diplomacy between President Erdoğan and President Trump is viewed positively on both sides. Particularly, on Dec. 8, Türkiye's influence in Syria increased with the fall of the Assad regime following a military operation launched by the opposition on Nov. 27. The YPG presence in Syria's Tal Rifaat and Manbij has long affected Turkish-American relations. However, it ceased to be a problem after the Ankara-backed Syrian

3 "ABD-Türkiye Stratejik Mekanizma Toplantısına İlişkin Ortak Açıklama", ABD'nin Türkiye Büyükelçiliği ve Konsoloslukları, 9 Mart 2024, <https://tr.usembassy.gov/tr/abd-turkiye-stratejik-mekanizma-toplantısına-iliskin-ortak-aciklama/>, (Access Date: 12 December 2024).

4 "Fiscal Year 2024 Budget Request Overview Book", US Department of Defense, 2024, https://comptroller.defense.gov/Portals/45/Documents/defbudget/FY2024/FY2024_Budget_Request_Overview_Book.pdf, (Access Date: 11 December 2024).

National Army (SNA) assumed its control. While it is uncertain whether the YPG can maintain its position in post-Assad Syria, and if the U.S. will follow through on a withdrawal from the country, as promised during Trump's first term. Nonetheless, The U.S. under Trump has transformed Türkiye into a more significant player in Syria.

In summary, 2024 can be described as a period of continuity in Türkiye-U.S. relations as Ankara focused on reducing its dependence on external actors, strengthening its military and diplomatic autonomy, and prioritizing national security issues. Despite differences in views, Türkiye has preferred to maintain open diplomatic channels and engage in pragmatic cooperation on key issues with the U.S.

MAIN DYNAMICS

In 2024, Washington's support for the PKK/YPG in Syria was the primary dynamic shaping Türkiye-U.S. relations. All the while, pragmatic relations in the defense sector continued to be a critical element of the bilateral relationship. The war in Ukraine, Israel's aggression toward Gaza, and the continuing military and geopolitical vulnerabilities in the Middle East also impacted Türkiye-U.S. relations.

The PKK/YPG Issue

One of the key dynamics influencing Türkiye-U.S. relations is the latter's support for the YPG, the Syrian offshoot of the PKK. It has created a near-impasse in ties with Washington because Ankara views the group as an existential national security threat and thus continues military operations as part of its fight against terrorism. Regardless, U.S. military support for the PKK/YPG terrorist groups fighting Daesh continued in 2024. In 2023, the U.S. Congress allocated \$156 million – as part of the 2024 defense budget – to benefit the YPG indirectly. In July, 610 trucks of weapons, ammunition, and logistical supplies were delivered to the YPG.⁵ Another issue for Türkiye is the U.S. administration's diplomatic support for the terrorist group. This support has sometimes manifested itself on the international stage and at other times in northeastern Syria, where the YPG holds sway. During the year, U.S. support to establish a central bank to regulate the economy in those areas further strained Turkish-American relations. On the other hand, while the U.S. initially did not object to efforts to hold elections in areas controlled by the

⁵ "ABD'nin PKK/YPG'ye Desteği Sürüyor", TRT Haber, 12 Temmuz 2024., <https://www.trthaber.com/videolar/abd-nin-pkkypg-destegi-suruyor-73307.html>, (Access Date: 11 December 2024)

PKK/YPG, following Türkiye's criticisms, the U.S. was forced to withdraw its support for the elections. In September, U.S. State Department Spokesperson Matthew Miller said the U.S. did not support the YPG plan for so-called elections in northern Syria, under U.N. Resolution 2254, emphasizing that all elections should be "free, fair, transparent, and inclusive." This showed that the U.S. administration had to take Türkiye's concerns into account.

Despite U.S. support, Türkiye continued to target PKK/YPG elements throughout 2024. The most critical development in this regard was Turkish airstrikes on PKK/YPG targets in Syria following a terrorist attack on the Turkish Aerospace Industries (TUSAŞ) campus in Ankara. The operation targeted the group's ammunition depots and critical infrastructure, while the U.S. maintained a pragmatic approach, remaining silent on Türkiye's ongoing targeted drone strikes throughout the year.

After the fall of the Bashar Assad regime on Dec. 8, the outlook of the PKK/YPG issue changed significantly. The Biden administration did not object to the SNA assuming control of Tel Rifat and Manbij. The U.S. Secretary of State Antony Blinken visited Türkiye, meeting with President Recep Tayyip Erdoğan and Foreign Minister Hakan Fidan. Similarly, a shift in U.S. attitude was observed after Dec. 8 as official statements recognized Türkiye's legitimate fight against terrorism, but support for the PKK/YPG continued nonetheless.⁶ Türkiye emphasized that the new ground reality after Dec. 8 had significantly altered the situation, making it impossible for the PKK/YPG to maintain its current presence.⁷

Defense and NATO Cooperation: F-16 and F-35

Türkiye's role as a NATO member and its defense cooperation with the U.S. continues to be a significant dimension of the bilateral relationship. The discussions and debates surrounding the F-16 procurement and Sweden's NATO membership, both prominent in the previous year, concluded in 2024. After the Turkish Grand National Assembly accepted the proposal for Sweden's NATO membership on Jan. 23⁸, the U.S. Congress approved the sale of F-16s to Türkiye on Jan. 27. Although there was no direct link between these two

6 Hilken Doğaç Boran, "ABD-Türkiye İlişkilerinde Yeni Kriz: Suriye'de Ne Olacak?", BBC Türkçe, 16 Kasım 2024, <https://www.bbc.com/turkce/articles/czr3lx3dzxvo>, (Access Date: 11 December 2024)

7 "MSB'den ABD'ye Tepki: Terörle Mücadele Teröristle Yapılmaz", TRT Haber, 7 Mart 2024, <https://www.trthaber.com/haber/gundem/msbden-abdye-tepki-terorle-mucadele-teroristle-yapilmaz-842560.html>, (Access Date: 12 December 2024)

8 Presidency of the "Türkiye Büyük Millet Meclisi, İsveç'in NATO Üyelliğini Onaylayan Tasarısı Kabul Etti", T.C. Cumhurbaşkanlığı İletişim Başkanlığı, 24 Ocak 2024, https://www.iletisim.gov.tr/turkce/dis_basinda_turkiye/detay/turkiye-buyuk-millet-meclisi-isvecin-nato-uyeligini-onaylayan-tasarisi-kabul-etti, (Access Date: 12 December 2024)

developments, the approval of the sale likely helped resolve any potential rifts in Türkiye-U.S. relations swiftly.⁹ Moreover, the ongoing war in Ukraine has strengthened Türkiye's role within NATO as the developments in European security architecture have highlighted the growing importance of conventional military power, thus realigning the strategic framework of Türkiye-U.S. relations around the NATO axis.

Another turbulent aspect of Türkiye-U.S. defense cooperation is the F-35 project. In 2021, the U.S. removed Türkiye from the F-35 program due to the latter's purchase of the Russian S-400 air defense system. A key future dynamic in their ties will be Türkiye's statements on rejoining the F-35 project, as confirmed by Turkish Defense Minister Yaşar Güler in December.¹⁰

Regional Challenges: Israel's Gaza Attacks and the Ukraine-Russia War

Israel's aggression toward Gaza has periodically caused tensions in Türkiye-U.S. relations, becoming one of its key elements. While the U.S. has maintained a pro-Israel stance, Türkiye has highlighted the ongoing genocide in Gaza, emphasized a two-state solution, and suspended its trade relations with Israel. In September 2024, President Erdoğan called on the international community at the U.N. General Assembly to "take action" on Gaza. The Biden administration, in the meanwhile, acknowledged human rights issues in Gaza but continued to offer full-fledged support for Israel.¹¹ The starkly contrasting stance of the two countries proved to be a challenge for their relations, but diplomatic channels remained open for a cease-fire agreement, and bilateral visits led to the development of intense diplomatic activity between the two nations. In this regard, 2024 was marked by frequent meetings, particularly at the foreign minister level.

The ongoing Russia-Ukraine war also highlighted some disagreements between Türkiye and the U.S. last year. The U.S.' support for Ukraine was solidified at the 75th NATO summit, with Kyiv receiving over \$40 billion in aid and provision of F-16 fighter jets. At the same NATO summit, Russia was

9 BBC Türkçe, "Türkiye, İsveç'in NATO Üyeliğini Onayladıktan Sonra Gündemdeki Sorular", BBC Türkçe, 18 Kasım 2024, <https://www.bbc.com/turkce/articles/ce5kxnere860>, (Access Date: 12 December 2024)

10 "Türkiye Milyarlarca Dolar Tasarruf Edecek: F-16'larını ABD Olmadan Modernize Ediyor", T.C. Cumhurbaşkanlığı İletişim Başkanlığı, 27 Kasım 2024, https://www.iletisim.gov.tr/turkce/dis_basinda_turkiye/detay/turkiye-milyarlarca-dolar-tasarruf-edecek-f-16larini-abd-olmadan-modernize- ediyor, (Access Date: 11 December 2024)

11 "Biden: 'Şüphesiz ki ABD, İsrail'i Tam Olarak Desteklemektedir'", Anadolu Ajansı, 20 Kasım 2024, <https://www.aa.com.tr/tr/dunya/biden-suphesiz-ki-abd-israili-tam-olarak-desteklemektedir/3348229>, (Access Date: 11 December 2024)

declared the greatest threat.¹² Türkiye, in comparison, followed a balanced foreign policy, advocating for Ukraine’s territorial integrity while maintaining open communication channels with Russia to support regional stability. President Erdoğan met his Russian counterpart Vladimir Putin at the BRICS summit in Kazan on Oct. 23. They discussed not only the Russia-Ukraine war but the Israel-Palestine conflict and economic cooperation as well, sending a message of collaboration.¹³ Despite Türkiye’s different stance within NATO, the disagreement between the two capitals has not caused a deep rift between Ankara and Washington.

PROSPECTS FOR 2025: TURKISH-AMERICAN RELATIONS BETWEEN PRAGMATISM AND FRAGILITIES

The dynamics that shaped Türkiye-U.S. bilateral relations in 2024 are expected to persist into 2025. However, due to the changing political landscape in the U.S. following the Nov. 5 elections, predicting the dynamics and potential crises to impact Ankara-Washington relations seems difficult. With the beginning of the second Trump term on Jan. 20, 2025, terms like “unpredictable” and “flexible pragmatism,” often used to describe his modus operandi, could bring about both change and continuity in U.S.-Türkiye relations. In the coming years, their ties will be shaped by certain factors. Although Türkiye has historically had an ups-and-down relationship with the U.S., the two countries have emphasized pragmatic contacts and succeeded in cooperating in many different areas. However, it is difficult to say that cooperation can always be achieved.

Especially, U.S. support for the PKK/YPG which impeded Türkiye-U.S. relations, is expected to continue in the coming year. Ankara will not change its anti-terrorism policy. In successive statements, Türkiye has emphasized its determination in countering terrorism. However, political changes in the U.S. and the fall of Syria’s Assad regime have introduced some ambiguity in their relations that would likely continue in the coming year. During his first term, Trump continued efforts to withdraw U.S. troops from Syria but faced opposition from within his cabinet, the military, and Congress, preventing him

12 BBC Türkçe, “Rusya-Türkiye İlişkilerinde Yeni Bir Dönem: BRICS Zirvesi’nin Önemi”, BBC Türkçe, 22 Kasım 2024, <https://www.bbc.com/turkce/articles/c99w1prdpqo>, (Access Date: 12 December 2024)

13 “Cumhurbaşkanı Erdoğan, BRICS Zirvesi Kapsamında Rusya Devlet Başkanı Putin ile Bir Araya Geldi”, T.C. Cumhurbaşkanlığı İletişim Başkanlığı, 23 Ekim 2024, <https://www.iletisim.gov.tr/turkce/haberler/detay/cumhurbaskani-erdogan-brics-zirvesi-kapsaminda-rusya-devlet-baskani-putin-ile-bir-araya-geldi>, (Access Date: 10 December 2024)

from achieving his goal of fully withdrawing from Syria. However, Trump's second term – with the Republicans controlling both Congress and the Senate and consolidating his power – presents him with an opportunity to do what he wants. This will likely have significant results for relations with Türkiye, particularly on issues like U.S. support for the PKK/YPG. After the fall of Assad on Dec. 8, Trump said, “This is not our war,” expressing that there should be no intervention in Syria.¹⁴ However, in the short term, it does not seem likely that the U.S. will stop supporting the PKK/YPG.

The YPG's future in Syria, especially after the fall of the Assad regime, may continue to be a critical point of divergence between Türkiye and the U.S. Two potential scenarios illustrate how this issue may evolve in 2025:

Scenario 1: Cooperation-Based Solution

In this scenario, Türkiye and the U.S. could reach a mutually acceptable compromise on the PKK/YPG issue. The U.S., acknowledging Türkiye's security concerns, would limit its military and political support for the YPG, while Türkiye would avoid large-scale military operations in northeastern Syria. Instead, both countries would cooperate on a framework aimed at stabilizing the region. This would allow for the security of the region, while Türkiye could accept the PKK/YPG's declaration of severing its ties with the PKK, positioning it as a non-military actor in Syria's political reconstruction in the new era.

Such a scenario could diversify cooperation opportunities between Türkiye and the U.S. By utilizing Türkiye's regional influence and the U.S.' intelligence capabilities, the fight against Daesh could continue without interruption and security risks could be minimized through the coordination between the two countries' security mechanisms. Thus, a cooperation-based approach could strengthen Türkiye-U.S. relations and open the door for broader cooperation on Syria's stability and other strategic issues.

Scenario 2: Conflicting Impasse

In this scenario, the YPG issue could turn into an open conflict between Türkiye and U.S.-backed forces in Syria. Considering the PKK/YPG as an existential threat, Türkiye could initiate extensive military operations in northern Syria to dismantle its infrastructure. The U.S. could, in turn, increase its support for the group, leading to heightened tensions and potentially triggering

¹⁴ Hilken Doğaç Boran, “ABD-Türkiye İlişkilerinde Yeni Kriz: Suriye’de Ne Olacak?”, BBC Türkçe, 16 Kasım 2024, <https://www.bbc.com/turkce/articles/czr3lx3dzxvo>, (Access Date: 11 December 2024)

a proxy conflict. In such a scenario, Türkiye's military resolve and the U.S.' persistence in supporting the PKK/YPG could result in increased tensions in bilateral relations. A conflict-based scenario would not just severely damage bilateral relations but could also trap Syria in a competitive security environment during its transition, reduce cooperation in other thematic areas, and push Türkiye to seek alternative alliances to balance U.S. influence.

Two issues in Türkiye-U.S. ties that are likely to resurface and be discussed in 2025 are NATO relations and defense-related projects. While Trump emphasizes NATO's deterrence, Türkiye has managed to balance both strategic autonomy and its NATO responsibilities. In his new term, if Trump highlights NATO's deterrence in limiting Russia and Europe, Türkiye, along with other allies, will support strengthening defense and deterrence. Trump's stance on the Ukraine war could set off a new era of consolidation in Türkiye-U.S. ties. With the increased importance of military power and strategic positioning in U.S. foreign policy during the second Trump era, Türkiye's role in both areas could be reinforced, leading to a period where the strategic context of bilateral relations is strongly emphasized. In that respect, Türkiye's return to the F-35 project in 2025 could also strengthen the defense aspect of bilateral relations.

Türkiye's support for a two-state solution in Palestine, efforts to bring regional peace through mediation, and its role in several prisoner exchanges are recognized by the U.S. Therefore, Trump's campaign promise of "ending wars" increases the likelihood of scenarios based on cooperation with Türkiye. However, it is also likely that Trump may prefer to offer unrestrained support to Israel, instead of seeking to end the Gaza conflict. In addition, similar Israeli aggression in the occupied West Bank could negatively affect Türkiye-U.S. ties. On the other hand, if Israel insists on expanding its unlawful occupation of the Golan Heights, it will likely face a serious reaction from Türkiye. Therefore, if the U.S. does not limit the destabilizing role Israel could play in Syria, new tensions could emerge between Ankara and Washington.

However, one important aspect that can be viewed positively in Türkiye-U.S. relations is the dynamics of diplomacy between their leaders. Under the new administration, the establishment of direct dialogue between President Erdoğan and Trump will directly impact relations between their countries. Outgoing President Biden's dialogue with President Erdoğan has remained limited and within the institutional framework, with only a few in-person meetings. However, communications during Trump's first term and his praise for a personal relationship with President Erdoğan indicate that leadership-level diplomacy will remain strong in the coming year. President Erdoğan's congratulatory phone call to Trump on the same day of his election win, say-

ing, “I congratulate my friend Trump,”¹⁵ indicates that communication between the two leaders will remain robust.

When drawing a general framework for Türkiye-U.S. relations in 2025, we can say that the two countries face various opportunities and challenges. The shaping of Türkiye-U.S. relations in 2025 will largely depend on the PYD/YPG issue, the pragmatism of the Trump administration, and the dynamics of regional policies in the Middle East. Opportunities and tensions will coexist in the relationship between the two countries, keeping the relations on a pragmatic but fragile ground.

Dynamics	Expectations for 2025	Impact on relations
Leader-level diplomacy between Erdoğan and Trump	Improved bilateral relations and direct dialogue	Opportunity
F-16 and F-35 cooperation, NATO-related projects	Strengthened defense and NATO collaboration	Opportunity
Potential cooperation on stabilizing Syria post-Assad	Stabilization of Syria and reduced tensions	Opportunity
U.S. support for PYD/YPG in Syria	Potential for conflict if the U.S. continues to support	Uncertainty
U.S. policy on Gaza and Israeli actions	Possibility of divergence due to differing stances	Uncertainty
Trump administration's unpredictable foreign policy	Volatility in bilateral relations and regional policies	Uncertainty

15 Ferdi Türkten, “Cumhurbaşkanı Erdoğan: ‘Yeniden ABD Başkanı Seçilen Dostum Donald Trump’ı Tebrik Ediyorum”, Anadolu Ajansı, 25 Kasım 2024, <https://www.aa.com.tr/tr/gundem/cumhurbaşkanı-erdogan-yeniden-abd-baskani-secilen-dostum-donald-trumpi-tebrik-ediyorum/3385821>, (Access Date: 12 December 2024)

TÜRKİYE-EUROPEAN UNION RELATIONS



Aylin Ünver Noi

03

SUMMARY OF 2024

- 1 The European Commission adopted the 2024 enlargement reports on Oct. 30, 2024, which included the Türkiye 2024 Report along with other candidate countries.
- 2 Turkish foreign minister rejected unfair assessments by the EU, notably on political criteria and internal political dynamics, in the EU Commission's 2024 report on Türkiye.
- 3 The EU and Türkiye held their first High-Level Dialogue on Trade in Brussels on July 8, 2024.
- 4 Turkish Foreign Minister Hakan Fidan attended an informal meeting of EU foreign ministers, known as the Gymnich meeting, held in Brussels on Aug. 29, 2024.
- 5 The EU Commission President Ursula von der Leyen visited Türkiye's President Recep Tayyip Erdoğan in Ankara on Dec. 17, 2024, to discuss developments in Syria after the fall of the Bashar Assad regime.

TÜRKİYE'S EU MEMBERSHIP PROCESS IN 2024

Although Türkiye has been an EU candidate country since the Helsinki Summit in 1999 and accession negotiations officially began in 2005, no significant progress was achieved in 2024. The last negotiation chapter was opened in June 2016 and no chapter has been opened or closed since. Türkiye's EU membership process remains unchanged since the negotiation process has been *de facto* frozen.

There were attempts to revive the ties, outlined in the State of play of EU-Türkiye political, economic, and trade relations report by the former EU High Representative Josep Borell and Commissioner for Neighborhood and Enlargement Oliver Varhelyi in 2023 and subsequent summits held in 2024. Another attempt was Ankara's invitation to the Gymnich meetings after a five-year hiatus. However, these efforts marked little progress in Ankara-Brussels relations since the European Council did not make any decision on the recommendations of the Joint Communication on EU-Türkiye Relations, prepared by Borell and Verhalyi. Although the Conclusions on Turkey (Türkiye) by the Special European Council held in Brussels on April 17-18, 2024, emphasized that the EU has a strategic interest in developing a cooperative and mutually beneficial relationship with Türkiye, progress in Türkiye-EU relations reduced to resolving the Cyprus issue.

Despite stagnation on other issues, the EU remained Türkiye's largest trading partner and export market for Turkish products in 2024, accounting for 43.9% of its exports.¹ According to the Türkiye 2024 Report, the country tackled a few long-standing trade barriers, partially removing some import

1 TİM "Ekonomi ve Dış Ticaret Bülteni, Temmuz 2024", TİM, Temmuz 2024, https://tim.org.tr/files/downloads/EkonomiBulteni/2024/Ekonomi%20ve%20Dis%20Ticaret%20Bulteni_Temmuz_2024.pdf, (Access Date: 10 December 2024)

and export restrictions. However, some trade barriers breaching the Customs Union obligations persisted in 2024. Duty relief, free zones and the surveillance scheme are still not fully aligned with the EU *acquis*.² There was no effort to modernize and update the Türkiye-EU Customs Union to resolve its discrepancies and eliminate the unfair implementation of the Customs Union between the EU and third parties on Türkiye showed no progress in 2024.

MAIN DYNAMICS OF TÜRKİYE-EU RELATIONS IN 2024

Foreign and Security Policy Alignment

In comparison to previous years, there was a regular enhanced political dialogue, established as part of the accession strategy with Türkiye. Its alignment with the EU's Common Foreign and Security Policy (CFSP) has steadily declined recently. In 2023, Türkiye's unilateral foreign policy diverged significantly from EU priorities, resulting in a low alignment rate of 9% with EU High Representative statements and Council decisions. This trend continued in 2024, with Türkiye's alignment rate further decreasing to 5% as of Sept. 30.³ The EU's Türkiye 2024 Report highlighted persistent divergences, particularly Türkiye's lack of alignment with EU sanctions on Russia and its stance on the Palestinian group, Hamas. Sometimes these divergent views and approaches in foreign and security policy led to tensions between Türkiye and the EU and continued to become one of the key dynamics in ties in 2024.

SECURITY AND DEFENSE POLICY, AND EU-NATO COOPERATION

Despite reduced alignment under CFSP, Türkiye continued to contribute to EU-led crisis management missions and operations under the Common Security and Defense Policy (CSDP). In 2024, Türkiye remained the largest non-EU troop contributor to the EUFOR Operation Althea in Bosnia-Herzegovina.⁴ The global security environment in 2024 prompted the EU to enhance its strategic autonomy. In that respect, the European Defense Industrial Strategy (EDIS) has been put forward with a long-term vision to achieve defense indus-

2 "Türkiye 2024 Report", Avrupa Komisyonu, 30 Ekim 2024, https://neighbourhood-enlargement.ec.europa.eu/document/download/8010c4db-6ef8-4c85-aa06-814408921c89_en?filename=Türkiye%20Report%202024.pdf, (Access Date: 11 December 2024)

3 "Türkiye 2024 Report", Avrupa Komisyonu, 30 Ekim 2024, https://neighbourhood-enlargement.ec.europa.eu/document/download/8010c4db-6ef8-4c85-aa06-814408921c89_en?filename=Türkiye%20Report%202024.pdf, (Access Date: 11 December 2024)

4 *Ibid.*

trial readiness in the EU in March 2024. The European Defence Industry Programme (EDIP) was proposed by the Strategy. The EU continued its discriminatory policies not allowing Türkiye – a NATO ally and EU candidate country – to join these defense initiatives except the German-led European Sky Shield Initiative (ESSI). Türkiye was invited to become a member of ESSI. In February 2024, the Turkish Minister of Defense signed the letter of intention to join ESSI, aimed at enhancing Europe's air defense capabilities.⁵

“It is of vital importance that the EU conducts its relations with our country with a fair and result-oriented approach, within the framework of the principle of fidelity and avoids policies and discourses that put our relations at an impasse. In the face of exclusionary policies against our country, which have a negative impact on the European Union's global power, Türkiye will not hesitate to use and develop its strategic opportunities and capabilities.” Recep Tayyip Erdoğan/09.05.2024

The EU also increased military support for Ukraine via the European Peace Facility (EPF) on March 18, 2024.⁶ However, Ukraine faced a shortage of artillery shells and guns because of funding and production miscalculations of the EU and the U.S. Despite Türkiye's capability to provide this ammunition, France, Greece, and the Greek Cypriot Administration blocked the financing for the supply of Turkish-made drones and artillery shells for Ukraine, which were to be purchased with European funds in 2024.⁷

In 2024, Türkiye continued to actively participate in NATO missions, including the NATO



It is of vital importance that the EU conducts its relations with our country with a fair and result-oriented approach, within the framework of the principle of fidelity and avoids policies and discourses that put our relations at an impasse. In the face of exclusionary policies against our country, which have a negative impact on the European Union's global power, Türkiye will not hesitate to use and develop its strategic opportunities and capabilities.

Recep Tayyip Erdoğan/09.05.2024

5 Alperen Aktaş, “Turkish, Greek Defense Chiefs Sign Letter of Intent to Join European Shield Initiative”, AA, 15 February 2024, <https://www.aa.com.tr/en/europe/turkish-greek-defense-chiefs-sign-letter-of-intent-to-join-european-sky-shield-initiative/3138837> (Access Date: 10 December 2024)

6 “Ukrayna, Avrupa Barış Tesisi ve Ek Finansman”, EPRS, 3 Eylül 2024, <https://epthinktank.eu/2024/09/03/ukraine-the-european-peace-facility-and-additional-financing/>, (Access Date: 12 December 2024)

7 “Greece, France Block Financing of Turkish UAVs for Ukraine: Report”, Daily Sabah, 22 February 2024, <https://www.dailysabah.com/business/defense/greece-france-block-financing-of-turkish-uavs-for-ukraine-report>, (Access Date: 12 December 2024)

enhanced Air Policing mission in an EU and NATO member state Romania to protect and safeguard its airspace.⁸ Additionally, Türkiye, Romania and Bulgaria established a Black Sea Mine Countermeasure Task Group to jointly tackle the mine threat in the Black Sea amid the Russia-Ukraine War in 2024.⁹ Besides these missions, Türkiye supported NATO's enlargement policy. Sweden formally joined NATO on March 7, 2024, after Türkiye lifted its veto on Swedish membership. The issues and initiatives related to security and defiance of the EU and Türkiye, and the latter's contribution to security and defense of the Euro-Atlantic alliance remained one of the key dynamics in their bilateral relations in 2024.

PROSPECTS FOR 2025

Recently, Türkiye and EU tensions have eased compared to 2020, driven by shifts in the security environment, Ankara's normalization of relations with neighbors, and efforts to revitalize its relationship with the 27-country bloc. Positive developments, such as Türkiye's lifting its veto on NATO membership for Finland and Sweden and its rapprochement with Greece, have contributed to improved relations.

However, challenges remain. The Türkiye-EU relationship has evolved from accession negotiations to a transactional relationship with no tangible positive outcome for either party. In this transactional relationship, there is no regular high-level dialogue between Türkiye and the EU on areas where cooperation is needed or dialogue is limited to specific areas. Transaction and relationships at the citizen level between Turkish and Europeans are also getting to the lowest level due to visa restrictions for Turkish citizens. The absence of regular high-level dialogue on areas for cooperation and visa restrictions is likely to remain significant issues in 2025. There is an urgent need to increase both formal high-level dialogue and informal citizen-level dialogue between Türkiye and the EU to improve the EU-Türkiye relationship. This is also vital to overcome disagreements and focus areas for cooperation and ultimately revive the membership process. Launching the EU and Türkiye's first High-Level Dialogue on Trade in Brussels on July 8, 2024, has raised hopes for 2025.

8 "Türkiye Deploys Fighter Jets to Romania for NATO Air Policing Mission", Defence Türkiye, March 2024, <https://www.defenceTürkiye.com/tr/icerik/turkiye-deploys-fighter-jets-to-romania-for-nato-air-policing-mission-5898> (Access Date: 12 December 2024)

9 "Türkiye, Romania and Bulgaria Establish a Task Force to De-mine Black Sea", AA, 1 July 2024, <https://www.aa.com.tr/en/europe/turkiye-romania-and-bulgaria-establish-task-force-to-demine-black-sea/3263294>, (Access Date: 11 December 2024)

Following the European Parliament Elections in June 2024 and the approval of the new European Commission for the period 2024-2029 in November 2024, building a European Defense Union has become a priority to counter common threats. The Commission aims to address security challenges through investments in defense capabilities, developing a single market for defense products and services, enhancing defense research and development, joint procurement, and enhanced EU-NATO cooperation. However, the Greek Cypriot Administration's interest in NATO membership could create new friction in EU-Türkiye relations in 2025. Türkiye's longstanding opposition to the Greek Cypriot Administration's NATO initiatives and the Greek Cypriot opposition to Türkiye's participation in EU-led defense initiatives underscores the potential for further disagreements.

Two key issues, however, could positively influence Türkiye-EU relations in 2025: the ongoing war in Ukraine and Türkiye's growing role in post-Assad Syria. The trajectory of Türkiye-EU relations may hinge on incoming U.S. President Donald Trump's stance on his country's policy on Ukraine. A potential cease-fire agreement or the continuation of the conflict could create an opening for Ankara-Brussels discussions on security and geopolitical dynamics at a strategic level. However, Trump's skeptical approach toward Europe could strain transatlantic ties and generate new geopolitical tensions, potentially driving a rapprochement between Türkiye and the EU.

Similarly, the new era in Syria presents opportunities for enhancing Türkiye-EU cooperation. The transitional phase, aimed at preserving Syria's territorial integrity, offers a framework for strengthened collaboration. However, unresolved challenges, such as the PKK/YPG issue and the possibility of further Turkish military operations in Syria, could exert negative pressure on Türkiye-EU relations. Balancing these dynamics will be crucial in determining the trajectory of their partnership.

To achieve its goal of becoming a "geopolitical EU," the bloc may need to reform its enlargement policy. Türkiye's strategic importance underscores the need for a revised approach to the group's enlargement.

TABLE 3 EXPECTATIONS 5IN TÜRKİYE-EU RELATIONS IN 2025		
Main Dynamics	Expectations for 2025	Impact on Relations
Foreign and Security Policy	Low alignment; focus on security dialogue.	Tensions over alignment; opportunities for dialogue.
Security and Defense Cooperation	Continued NATO collaboration; selective EU defense.	Improved cooperation; friction over membership issues.
Trade and Customs Union	Possible updates: trade disputes may persist.	Enhanced trade ties; disputes hinder full potential.
Visa Restrictions	Visa liberalization unlikely; societal tensions remain.	Strained societal trust and broader cooperation.
Post-Assad Syria	Collaboration on Syria; The YPG issue may cause friction.	Opportunities, but conflicts over Syria's future.
Ukraine War	Cease-fire or prolonged conflict to shape talks.	Strategic dialogue; potential geopolitical tensions.

TÜRKİYE-NATO RELATIONS: Developments and Projections



Murat Aslan

04

SUMMARY OF 2024

- 1 NATO's 2024 Summit addressed key challenges, including Ukraine, Middle East instability, and Arctic security, with Türkiye securing NATO's southern and eastern flanks.
- 2 Türkiye's Strategic Role supported NATO's surveillance and rapid response, highlighted by hosting the Steadfast Defender 2024 exercise.
- 3 Türkiye reaffirmed its commitment to NATO, emphasizing counterterrorism and border security concerns.
- 4 Russia's actions in Ukraine and the Black Sea shaped NATO's strategy, while Türkiye balanced NATO duties with Russia ties.
- 5 NATO prioritized cybersecurity, space, and climate change, with Türkiye aligning to these shifts while safeguarding alliance priorities.
- 6 Sweden joined NATO as its 32nd member on March 7, 2024, after Türkiye lifted its veto.

NATO Washington D.C. summit, held on July 9-11, 2024, marked the Alliance's 75th anniversary and addressed the present security challenges and NATO's future role. It was the military alliance's first event with 32 members, including Sweden. The Summit was committed to handling Ukraine as the priority by building the NATO Security Assistance and Training for Ukraine (NSATU) and pledging a \$40 billion grant to augment Kyiv's defense capabilities.

The Summit emphasized defense spending and industrial capacity expansion, with a special emphasis on 2% GDP defense spending as a benchmark. Meanwhile, the NATO Summit introduced an Industrial Capacity Expansion Pledge, emphasizing defense production, multinational procurement, and supply chain resilience, to better respond to threats like Russian rearmament. Emerging threats were also among the concerns, essentially pointing out China providing support to Russia's cause in Ukraine. The Summit described it as a "no-limits" partnership with Russia. Meanwhile, cyber and space defense capabilities were delineated covering all domains. In that sense, Enhanced NATO Deterrence and Defense put forward new-generation defense plans by modernizing NATO's command structure and improving readiness against multi-domain threats, including hybrid warfare.

NATO Summit Decisions (Brussels) in July 2024 clearly addressed critical challenges, including the ongoing Ukraine conflict, regional instability in the Middle East, and the Arctic's strategic importance. Türkiye's prominence in two of the three challenges is committed to securing NATO's south and southeastern flank.

There were two important ministerial-level meetings, of which first was among the Defense Ministers on Oct. 16-18, 2024 and Foreign Affairs on Dec. 3-4, 2024, both held in Brussels.

The NATO Defense Ministers meeting focused on strengthening collective defense, increasing support for Ukraine, and enhancing partnerships, particu-

larly in the Indo-Pacific. Key decisions included the continued delivery of military aid, with NATO members having provided 20.9 billion euros (\$21,43 billion) in military assistance to Ukraine in the first half of 2024 and reminded to meet its 40 billion euros commitment by the end of the year. Other than the establishment of a new NATO command center in Wiesbaden, Germany, to coordinate security assistance and training for Ukrainian forces, the Meeting reviewed the Indo-Pacific Collaboration. For the first time, Defense Ministers from Australia, Japan, New Zealand, and South Korea participated in a NATO meeting. The Ministers also discussed measures to strengthen cyber defenses, counter disinformation, and adopt new technologies like artificial intelligence (AI). Efforts to standardize defense procurement were approved, aiming to enhance efficiency and reduce costs by expanding defense industrial capacity, improving supply chains, and aligning standards to support NATO's long-term resilience across all domains.

The NATO Foreign Ministers Meeting confirmed the Washington Summit and Brussels Defense Ministerial Meeting. NATO reaffirmed its commitment to providing long-term military assistance to Ukraine through training, advanced equipment delivery, and support for reforms in the Ukrainian defense sector. Ministers also reviewed the defense spending of member states claimed at the Vilnius Summit. Discussions advanced on deploying pre-positioned military equipment and establishing new rapid deployment capabilities to enhance NATO's readiness in eastern Europe and other vulnerable areas. Regarding technological innovation, Ministers discussed integrating emerging technologies, including AI and cyber defense systems, into NATO's strategic operations to maintain technological superiority.

TÜRKİYE'S ROLE IN NATO'S CAPACITY AND CAPABILITY-BUILDING EFFORTS

Türkiye was compliant with the decisions taken to expand the NATO capacity and capabilities. Once the geographical proximity of Türkiye to the existing and potential crises in the vicinity are concerned, Türkiye remained central to NATO's mission to maintain collective security. Its strategic location served NATO's surveillance and rapid response capabilities under the shadow of the Ukraine-Russia War as well as developments in the Middle East and North Africa. In this frame, Russia's ongoing military actions in Ukraine and its increased activity in the Black Sea continued to shape NATO policies. Türkiye's decision to apply the Montreux Treaty continued in 2024 by denying the access of Russian naval assets to the Black Sea. Türkiye's balancing act between NATO obligations and bilateral relations with Russia remained a defining aspect of 2024. Additionally, Türkiye hosted the Steadfast Defender 2024 ex-

ercise, showcasing its operational readiness. NATO's increasing focus on cyber threats, space security, and climate change adjusts the military readiness of the alliance. Türkiye complies with these emerging concerns while reserving priorities of the Alliance if the existential threats are concerned.

Turkish leaders frequently underlined Türkiye's commitment to NATO while advocating for greater recognition of the nation's unique security challenges, particularly regarding counterterrorism and border security. In this sense, Türkiye is insistent on solidarity fighting against terror threats and cordially criticized the relationship between the U.S. Government and PKK offshoots in Syria. Türkiye also called on the European Allies to stop and ban the activities of PKK in Europe.

DYNAMICS OF TÜRKİYE'S NATO POLICY

The dynamics that affect Ankara-Brussels relations are either about the issues in control of NATO and Türkiye, or independent variables that Türkiye is subject to.

The Resilience of the Alliance and Türkiye's Contribution: Türkiye has an area of operation coverage in the southeast of the Alliance. The area in concern is linked to the south and eastern front across where existing and potential crises are widespread. Türkiye is consistent with the alliance's goals while pursuing the mood of foreign policy. It is cooperation and confrontation in the meantime through compartmentalizing the areas of collaboration and competition like Türkiye-Russian relations. The outcome is continuous crisis management through the "Fight and Talk" strategy. The NATO Summits and Ministerial Meetings clearly pointed to such a balanced posture.

Defense Expenditures: The Alliance required 2% defense expenditure over GDP. Türkiye has experienced ups and downs in the economy for the last two years, though; the expenditure is 2.09%, which makes Türkiye 18th in 32 member states. The personnel spending is 43,6% while the allotted resource to major equipment and R&D is 34.2%. Türkiye's gross domestic product (GDP) is \$1.108 trillion, which makes the percentages overwhelming if compared to the other member states. The national defense program, contrary to defense imports, makes the spending much more efficient due to low-cost and high-effect options. Finally, Türkiye's contribution to the NATO budget is 5%, which makes her eighth with \$100 million.

NATO Operations and Türkiye's Role: Türkiye assumes responsibilities for NATO operations and, if required, participates in the already proceeding ones. Türkiye lately assumed the command of Standing NRF Maritime Group-2/ SNMG-2 as of Dec. 5, 2024. Türkiye is actively assuming the role in Iraq by training the Iraqi forces and is the second top contributor after Canada within the Alliance. The other operation is KFOR which Türkiye assumed and

handed over the command to the Italian Armed Forces as of Oct. 11, 2024. For instance, active participation in NATO security with the Kürecik Radar, dedicated to providing early warning to the Alliance since 2012. Regarding combat readiness, NATO's Landcom is in Izmir city, and High Readiness Force Headquarters of ARRC (Allied Rapid Reaction Corps) is in Istanbul, and NRDC-T are significant missions.

HOW COULD THE CURRENT DYNAMICS EVOLVE IN 2025?

NATO will augment its readiness in 2025 due to the existing Russia-Ukraine War and ambiguities in the vicinity of the Alliance area of interests. The new concerns will probably erupt in remote areas such as the Indo-pacific region and Africa. In this frame, expeditionary missions will be of utmost importance. In this sense, NATO will be committed to the resilience of the Alliance through high readiness and interoperability. Emerging “new” threats will push NATO to transform itself to comply with the prerequisites of future conflicts and escalations. Türkiye, despite the “shift of axis” accusations of malign individuals and institutions, will be dedicated to the vision, goals, and objectives of NATO. Meanwhile, Türkiye's expanding soft power and mediation/facilitation capacity may ease the crisis that NATO could deal with.

TABLE 4 PROSPECT FOR TÜRKİYE – NATO RELATIONS

Issue	NATO	Türkiye	Potential Outcome
The Resilience of the Alliance	Build a firm defense line across the integrated south, southeast, and eastern front	Contribute to the mentioned three directions in compliance with the new norms	Continuous crisis management through “Talk and Fight” strategy
Defense Expenditures	NATO required at least 2% of GDP as defense expenditures	Türkiye has spent 2.09% of GDP	Türkiye contributes to combat readiness by spending the defense budget on nationally manufactured defense systems, which makes the expenditures cost-effective
NATO Operations	NATO expects direct contribution to the operations to expand the interoperability and readiness	Türkiye hosts NATO HQs, allots high readiness forces, and assumes commands of the operations Mediation and facilitation capacity of Türkiye, other than soft power, could promote NATO security.	Türkiye's role augments the resilience

TÜRKİYE-RUSSIA RELATIONS: Indirect Restraint Under Strategic Cooperation*



Mehmet Çağatay Güler

05

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SUMMARY OF 2024

- 1 The highlights of face-to-face and telephone conversations between the leaders and foreign ministers of both countries are as follows:

Regional developments centered in Ukraine and Syria

The further development of bilateral relations, especially in energy and trade.

- 2 Moscow has emphasized that Türkiye becoming part of the ongoing Western sanctions against Russia would harm bilateral relations.

- 3 Russia raised concern regarding Türkiye's military support to Ukraine and denied Ankara's role as a possible mediator.

- 4 Along with the fall of the Bashar Assad regime, Russia has leisurely started to withdraw its forces from Syria and the future of its bases remains doubtful.

Türkiye is the only NATO member country that has managed to engage with both warring parties. Almost all diplomatic talks, with both Ukrainian and Russian counterparts, discussed the current status of the crisis and how it can be resolved. Moscow's initial attitude, which was not against the idea of Türkiye's mediation during the Istanbul talks in 2022, has clearly changed in 2024. The Kremlin reiterated the fact that it does not support Ankara being a mediator in the possible peace talks. From Russia's perspective, the main reason is Türkiye's military cooperation with Ukraine. Their approach is not necessarily forcing Ankara to terminate the cooperation, but rather to vocalize that a country that is in a strategic relation with Ukraine cannot be a mediator.

In 2024, unlike last year's conjuncture, the Kremlin is mainly concerned with the possibility of Türkiye participating in Western sanctions against Russia. Moscow believes that such a move would narrow its trade-oriented transaction options while completely distancing Ankara from Moscow. The so-called concern has been reflected in bilateral talks between their respective leaders and ministers.

Besides Ukraine, Syria was the other noteworthy issue between the two countries in 2024, especially in light of the developments that took place toward the end of the year. The fall of the Assad regime and the opposition taking control of the capital Damascus have fundamentally altered the Syrian equation. Russia has lost one of its primary allies in the Middle East and the strategy of balancing U.S. influence in the region has been torn apart. Moreover, the future of the Russian naval base in Tartus and the air base in Hmeymim remains doubtful. These bases are indispensable for Russia's influence in the Eastern Mediterranean as well as in Libya and the Sahel region. Therefore, the ambiguity in the status of its aforementioned bases will have strategic consequences for Moscow.

In comparison, Türkiye, through its anti-Assad stance and constant support for the revolution, became a leading actor in Syria in 2024. In the latest equation, Russia's power projection has narrowed where Türkiye has expanded its scope. Although there is no causal relation between them, there seems to be a correlation in terms of the context. Ankara's Syria strategy has caused a contraction in Moscow's sphere of influence and loss in terms of status. In this context, Türkiye's approach in 2024 seemed to be a type of restraint strategy without directly aiming for it. William C. Martel defines the first principle of restraint as "to limit, moderate, deter, compel, or hold back the actions of states, organizations, groups, or transnational forces."¹ Türkiye's steps – while not directly and intentionally aiming to limit or deter Russia's influence and material capabilities – nevertheless cause significant shrink in such indicators. As such, Türkiye's engagement with Syria and to some extent Ukraine seems to have such consequences over Moscow's influence. Despite, the economic transaction of around \$56 billion and the power asymmetry between them, Ankara's steps narrowed Russia's power projection.

BILATERAL RELATIONS DYNAMICS

Ukraine has been one of the fundamental dynamics in Türkiye-Russia relations for years. Russia's occupation and illegal annexation of Crimea in 2014 was a significant milestone, and the new status-quo emerged regarding the delimitation of maritime jurisdictions and the security in the Black Sea. Moscow attributes great importance to Ukraine beyond Crimea and the Black Sea, due to its connection to Russia's "Near Abroad" doctrine. The doctrine covers the entire former Soviet geography, except the Baltics. Within this doctrine, Russia acknowledges the post-Soviet area as its own privileged sphere of influence and does not allow any other actor to influence the region. Moreover, the delineated region functions as a tool for Moscow to preserve and further strengthen its status. In addition, Russia envisions the "Near Abroad" as a buffer zone between the mainland and the West; thus, aiming to guarantee the security of the motherland. Ukraine is one of the most crucial parts of this doctrine along with Belarus. From the Kremlin's point of view, Kyiv is leaning toward the West, and hosting NATO's weapons and equipment is unacceptable. Besides, Putin does not even accept the Ukrainian identity. He claims that the existence of the state was artificially created and it was the fault of the Soviet era. In other words, he even believes that Ukraine as a separate state does not exist, so much so, it should be subject to Russia.

1 William C. Martel, "Grand Strategy of 'Restraint'", *Orbis*, Vol. 54, No. 3, 2010, pp. 356–373.

Ukraine, meanwhile stands, for four things to Türkiye: 1- A strategic ally with which it has deep cooperation revolving around the defense industry, 2- A stakeholder in Black Sea security and Türkiye's maritime neighbor, 3- A balancing-restricting actor against Russia, and 4- Homeland for ethnic Turkic Tatar population. Although the volume of the Türkiye-Ukraine trade is not very large, it is strategic, and it should be taken into account that war conditions continue. Kyiv is also extremely critical in terms of the security of the Black Sea and the balancing of Russia in military, political and religious terms. Furthermore, Türkiye attaches great importance to the rights and prosperity of the Crimean Tatars and does not have the intention to step back from its position. In other words, the meaning of Ukraine for Türkiye fundamentally conflicts with Russia's "Near Abroad" doctrine. Since Türkiye as a NATO member perceives Ukraine as a strategic partner with whom it has close military and defense industry ties, it poses a threat to Moscow. Similarly, Türkiye's support for the Tatars in the region and its unwavering stance create a persistent tension in Türkiye-Russia relations. Moreover, Türkiye's perception of Ukraine as an actor that restricts Russia does not create a positive sense in Moscow. In this context, Ukraine has undeniably become a dynamic in bilateral relations.

Syria on the other hand, is an important dynamic that has come to the fore in bilateral relations, especially after 2015, but has a background dating back to the 20th century. Russia's military intervention in Syria as of this date, has made the two countries neighbors, not only from the north but also from the south. For Moscow, Syria is not just Syria or military bases. It is also a tool for balancing U.S. influence and strengthening its prestige and status. Russia's presence in Syria not only affects its Middle East policy but also Moscow's ability to consolidate power in the Eastern Mediterranean and Africa. Its bases in Syria indicate the essential logistics lines extending to the south. In addition, the security of the homeland for Moscow – in terms of the contamination of the radical elements – begins in Syria. There are even scholars who started to argue that Syria has been included in Russia's "Near Abroad" after 2015.

"Since the beginning, we believe that the Ukraine-Russia war can end not with more weapons, more blood, more tears, but with more peace efforts, more goodwill and diplomacy." Recep Tayyip Erdoğan/ 20.11.2024



Since the beginning, we believe that the Ukraine-Russia war can end not with more weapons, more blood, more tears, but with more peace efforts, more goodwill and diplomacy.

Recep Tayyip Erdoğan/ 20.11.2024

After the Russian intervention in Syria, Moscow has adopted an approach that is fundamentally opposed to Türkiye's position, keeping the regime on its feet and using the fragility in the region as a trump card against Ankara. Such a trump card has been directly threatening Türkiye's national security. To be more precise, the constant possibility for the spread of terrorism, as well as the long-lasting instability and displaced population, pose an existential threat to Türkiye. Russian power and direct influence in Syria indicated a restriction and constant risk for Ankara. Syria has a similar value in Türkiye's national security strategy as Ukraine does for Russia's "Near Abroad" doctrine. Hence, Ankara's strategy for the region is designed on this axis of the elimination of all types of trump cards that could be used against Türkiye. Therefore, the Syrian case has become a fundamental dynamic in bilateral transactions that brings Russia and Türkiye face to face both at diplomatic tables and in the field. The prospects will be provided in the following section.

PROSPECTS FOR 2025

Considering the dynamics in bilateral relations and developments in 2024, I would like to categorize the set of possibilities that we may expect to see in Türkiye-Russia relations in the year 2025 (See Table 5). In that context, a similar trend will continue in energy trading, with minor ups and downs. Türkiye receives nearly half of its natural gas from Russia and the vast majority of bilateral trade volume also consists of energy imports. The ups and downs are normal under current circumstances, and frankly, it is so much depended on the policy Trump will follow. Since the beginning of the sanctions, Türkiye has managed to keep the trade volume at similar rates, and it has no alternative for the amount received from Russia. Therefore, the persistence of strategic cooperation in economic terms is more probable. However, the preferable outcome in the long term is the reduction of dependence on Russian natural resources. In such a case, Ankara would be able to make decisions much more freely vis-a-vis Moscow.

Furthermore, considering the escalating tensions in the Ukraine war and the long-range missile permits granted to Kyiv, a confrontation between NATO and Russia seems possible. However, being possible does not mean that it is going to happen. Nevertheless, Ukraine's Kursk incursion and permission to use U.S.-made Army Tactical Missile System (ATACMS) and similar missiles to target Russian territory, has significantly escalated NATO-Russia tensions. Russia has changed its nuclear doctrine and declared that it will acknowledge any non-nuclear country attacking its soil with the help of a nuclear country as joint aggression. In such a case, using force including

nuclear weapons will be accepted as a reciprocity adopted against all parties – in this scenario Ukraine and NATO. This naturally makes a confrontation between the two sides possible. Türkiye, as a NATO member, will be affected by this possibility and may become a party to the war, even though it prefers to be neutral.

However, it should also be mentioned that despite the various tensions and thresholds crossed in the Ukraine war, no such confrontation has occurred yet. Similar arguments have been made on several occasions like the deployment of Western air defense systems and F-16 fighter jets. Furthermore, it is not very likely that Russia would accept the cost of such an attack. Thus a cease-fire between the warring parties based on ground realities is a more likely scenario. In other words, a new status quo is imposed on both Ukraine and Russia through a cease-fire. This approach is likely the most probable scenario Trump may adopt when he takes office. The most preferable outcome in this regard is that the cease-fire agreement was signed under the mediation of Türkiye while respecting and protecting the rights of Crimean Tatars.

The recent developments in Syria and the ambiguity in the country's future, make it difficult to distinguish plausible and probable outcomes from each other. In today's conjuncture, it is plausible that Russia withdraws all its elements from Syria and completely evacuate its bases. If that happens, it will also deeply disrupt Russia's Middle East, Eastern Mediterranean and Africa policies. Ultimately, if Moscow fails to manage Syria together with the war in Ukraine and narrows its power projection by abandoning strategic interests, its status in the international system will become highly debatable. Regardless of the reason, a bargain in which strategic interests are given up and what is previously gained is lost, damages Russia's status either way.

What seems more likely is that Moscow minimizes all its military elements and protects its military bases, especially in Latakia and Tartus. However, the latest satellite images indicate a more comprehensive withdrawal. Therefore, it is quite difficult to distinguish plausible from probable, but one thing is clear, Türkiye is going to have a greater influence in both scenarios. In fact, Türkiye is the only candidate to fill the power vacuum left by Russia. At this point, the most preferable scenario in Türkiye-Russia relations is the recognition of the new status quo and government in the region. At the same time, Türkiye would like to see Russia on its side in its fight against the PKK/YPG, not on the opposing side. For Moscow, the higher the probability of accepting the status quo, the less likely it is to cooperate against the PKK/YPG.

TABLE 5. PROSPECTS OF TÜRKİYE-RUSSIA RELATIONS IN 2025		
Plausible Outcome	Probable Outcome	Preferable Outcome
Similar Trend in Energy Trade	Maintaining the Strategic Economic Cooperation	Less Dependency on Russian Energy Resources
NATO-Russia Confrontation	Cease-fire and New Status-Quo in Ukraine	Türkiye's Mediation and Upholding the Rights of Crimean Tatars
Withdrawal of All Russian Forces and Bases from Syria	Reducing Forces and Protecting Military Bases	Recognizing the New Status-Quo and Cooperation Against PKK/YPG

TÜRKİYE AND THE NEW SYRIA: Building Stability After the Fall of Assad



Murat Yeşiltaş



Kutluhan Görücü

06

SUMMARY OF 2024

- 1 Operation Deterrence of Aggression by the HTS led to the collapse of the Assad regime in Syria.
- 2 A transitional government was formed, led by Ahmed al-Sharaa (al-Golani).
- 3 PKK/YPG presence west of the Euphrates River has been significantly reduced.
- 4 Strategic cooperation is anticipated between Türkiye and the new Damascus government.
- 5 The end of the Assad regime has removed the conditions that allowed the PKK/YPG to exist, making their liquidation likely.

INTRODUCTION

At the end of 2024, Syria underwent transformative changes that dramatically altered its political and military landscape. On Nov. 27, the opposition led by Hayat Tahrir al-Sham (HTS) launched operation Deterrence of Aggression, alongside the Syrian National Army (SNA), toppling the Bashar Assad regime swiftly and unexpectedly. This development upended existing power dynamics and redefined Syria's geopolitical trajectory. Ahmed al-Sharaa (nom de guerre Abu Mohammed al-Golani), who previously held limited authority in Idlib, emerged as the central figure in the transitional government and initiated high-level diplomatic engagements, particularly with Türkiye and other regional actors.

MAIN DYNAMICS

Strategic Advances and Territorial Shifts

The opposition's military campaign not only dismantled the Assad regime but also significantly weakened the presence of the PKK/YPG west of the Euphrates River. Cities like Tel Rifaat and Manbij fell under the control of the SNA, marking a substantial territorial loss for the PKK/YPG. Although partial agreements were reached to evacuate PKK elements from neighborhoods in Aleppo, the group retains limited influence, particularly in the Sheikh Maqsoud and Ashrafiye areas.

East of the Euphrates, growing protests in Hasakah, Raqqa, and Deir el-Zour have highlighted popular dissatisfaction with the PKK/YPG's presence. The lack of demographic depth in the Syrian northeast, coupled with declining support even among the Kurdish population, suggests that the PKK/YPG's ability to sustain control is waning. The revolutionary momentum generated by the fall of the regime has further amplified pressures against the PKK's position in these regions.

Dynamics of Regime Overthrow

The success of operation Deterrence of Aggression was rooted in preceding developments that shifted the military balance in favor of the opposition and Türkiye. Regional disruptions caused by Russia's invasion of Ukraine and Hamas' Operation Al-Aqsa Flood, which diverted attention and resources from Syria and most importantly weakened Iran's proxy support for Assad were key strategic factors behind the fall of the Syrian regime. The combined effect of these developments set the stage for a coordinated opposition military offensive. Opposition forces initially gained control of Aleppo, Hama, and Homs with minimal resistance from regime forces. They subsequently captured Damascus on Dec. 8. Assad was forced to flee the country and seek refuge in Russia.

Formation of Transitional Governance

Following the regime's collapse, HTS leader Ahmed al-Sharaa took charge of forming a transitional government. Key developments include:

- Appointment of Mohammed al-Bashir as Prime Minister.
- Creation of ministries overseeing defense, justice, economy, education, and development.
- Governor appointments from HTS-allied military factions to establish localized governance structures.

Al-Shara's leadership style emphasizes the integration of allied military groups under centralized control via the Defense Ministry, signaling efforts to consolidate central authority. However, residual tensions among competing factions pose potential governance challenges. Nevertheless, the rapid formation of transitional institutions reflects a degree of organizational preparedness and external diplomatic recognition.

The Decline of PKK/YPG Influence

The PKK/YPG aligned itself with the Assad regime during the opposition's offensive, attempting to fill the power vacuum left by retreating regime forces. However, its attempts to seize control of Manbij and Tel Rifaat failed, resulting in swift defeats at the hands of the SNA. The Dawn of Freedom Operation on Dec. 1 effectively dismantled PKK/YPG positions, eroding their strategic depth west of the Euphrates.¹ The PKK/YPG's continued presence in Aleppo

¹ "Syrian National Army continues to advance against PKK/YPG terror group in Operation Dawn of Freedom", *Anadolu Agency*, December 1, 2024, <https://www.aa.com.tr/en/middle-east/syrian-national-army-continues-to-advance-against-pkk-ypg-terror-group-in-operation-dawn-of-freedom/3410094> (Access Date: 14 December 2024)

faces logistical challenges and declining morale. Meanwhile, growing protests in Arab-majority regions like Raqqa and Deir el-Zour further isolate the group, undermining its aspirations for autonomous governance. Popular unrest, combined with defections from Arab elements within the so-called Syrian Democratic Forces (SDF), has further weakened the PKK/YPG's foothold.

Strategic and Geopolitical Implications

The transitional government prioritizes Syria's territorial integrity, viewing the PKK/YPG's presence as a barrier to stability. The government's efforts to integrate Arab-majority areas into its administrative framework could solidify opposition control while marginalizing PKK/YPG influence. Türkiye's strategic support for opposition forces has elevated its regional influence. Prospects for cooperation between Türkiye and the transitional government appear strong, particularly regarding counterterrorism and post-conflict reconstruction. The fall of the Assad regime has also triggered diplomatic recalibrations, with Western powers engaging the transitional government to ensure stability. Russia and Iran, key Assad allies, face diminished leverage, while Gulf states may seek closer ties with the new administration to counterbalance Iranian influence.

TÜRKİYE'S POLICY TOWARD POST-ASSAD SYRIA: PROSPECT FOR 2025?

The collapse of the Assad regime has reshaped Syria's political and security landscape, presenting Türkiye with both challenges and opportunities. Türkiye's response to this transformation is guided by four core pillars – establishing a centralized authority, building a unified Syria, strengthening regional diplomacy, and activating multilateral international engagement – all of which frame its strategic approach to securing stability and advancing its national interests.

“The protection of Syria's territorial integrity and unitary structure is an issue that our country will never compromise on. Since day one, we have said what our position is regarding separatist ambitions, we have announced it to the whole world, we have demonstrated our determination. In this process, Türkiye will stand by the Syrian people, as it has done since the beginning of the conflict, and will provide all necessary contributions.” Recep Tayyip Erdoğan/18.12.2024

Establishing Centralized Authority

The formation of a transitional government under al-Sharaa marks a critical shift toward re-establishing governance structures in Syria. Türkiye views this



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Recep Tayyip Erdoğan/18.12.2024

development as an opportunity to promote political stabilization and state-building. Ankara's early diplomatic outreach, including visits by Turkish intelligence chief İbrahim Kalın and Foreign Minister Hakan Fidan, underscores its commitment to guiding Syria's political transition. Türkiye's efforts for the transition period will likely focus on:

- Supporting the consolidation of state institutions under the transitional government,
- Ensuring the disarmament and integration of opposition militias into a unified national army to prevent fragmentation,
- Facilitating security sector reforms to create a centralized and functional administration capable of maintaining order and territorial integrity.

Türkiye's strategy prioritizes preventing Syria's fragmentation into competing zones of influence and countering efforts by external actors to exploit local divisions.

Building a Unified Syria

Türkiye has long emphasized the importance of Syria's territorial integrity, and the fall of the Assad regime presents a chance to reverse the fragmentation caused by years of civil war. The retreat of the PKK/YPG from key regions, particularly west of the Euphrates, creates favorable conditions for Türkiye to push for a unified Syria free of separatist threats. Ankara's policy will likely focus on:

- Eliminating PKK/YPG presence in collaboration with the new government, ensuring that no armed groups challenge Syria's sovereignty,
- Facilitating the reintegration of opposition-held areas under a central authority while supporting inclusive governance structures,
- Promoting national reconciliation efforts to heal sectarian and ethnic divisions, ensuring broad-based support for the transitional government.

By prioritizing unity, Türkiye aims to secure its own borders and prevent the emergence of autonomous enclaves that could destabilize the region. Therefore, one of Türkiye's strategic priorities in 2025 will likely be to focus on the YPG issue. Türkiye's priorities for solving the problem include the following: disarmament of the YPG, and separation of PKK elements and foreign fighters within the YPG.

“It is important for the Syrian opposition to unite and form an inclusive government. It is time to unite and rebuild the country. Syrians who were forced to flee their homes because of the war will now be able to return to their lands.”
Hakan Fidan/ 10.12.2024

Strengthening Regional Diplomacy

The regional power vacuum created by Russia's diminished influence and Iran's weakening position provides Türkiye with an opportunity to shape new regional politics. Ankara's engagement strategy is built on fostering cooperation with regional organizations, including the Arab League, the Organization of Islamic Cooperation (OIC), and the Gulf Cooperation Council (GCC), to secure broad regional support for Syria's transition. Türkiye's approach includes:

- Forging alliances with regional organizations to promote stability and economic recovery in Syria,
- Enhancing diplomatic coordination with Arab and Islamic platforms to address political, economic, and security challenges collectively,
- Promoting regional integration frameworks to strengthen Syria's sovereignty and counter external threats.

Türkiye's diplomatic initiatives emphasize regional cooperation and solidarity, recognizing the role of collective efforts in ensuring Syria's stability and reintegration into the regional system.

Activating Multilateral International Engagement

Türkiye recognizes the importance of multilateral diplomacy in securing long-term stability in Syria. As the first country to reactivate its embassy in Damascus, Türkiye signals its intention to lead international efforts to stabilize and rebuild Syria. Ankara's strategy will involve:



It is important for the Syrian opposition to unite and form an inclusive government. It is time to unite and rebuild the country. Syrians who were forced to flee their homes because of the war will now be able to return to their lands.

Recep Tayyip Erdoğan/ 20.11.2024

- Advocating for international recognition of the transitional government to secure political legitimacy,
- Mobilizing international aid and investments for reconstruction projects, focusing on infrastructure, energy, and humanitarian assistance,
- Promoting cooperation through the U.N. and other international platforms to combat terrorism,
- Coordinating with global actors, including China and the European Union, to attract economic and diplomatic support for Syria's transition.

Türkiye's multilateral approach aims to ensure that Syria's reconstruction is inclusive, sustainable, and resistant to external manipulation.

This multi-dimensional strategy positions Türkiye as the central actor in shaping Syria's political and security order, ensuring that the post-Assad era aligns with Türkiye's strategic interests while contributing to broader regional stability. However, the collapse of the Assad regime and the emergence of a transitional government in Syria have introduced both opportunities and significant risks for Türkiye. While the transformation presents a chance to stabilize the region, the uncertainties surrounding security, governance, and external influences require careful management.

Key risks include:

1. *Political Fragmentation*: The transitional government may struggle to consolidate authority, risking the emergence of competing factions and local militias, which could destabilize Syria further and impact Türkiye's border security.
2. *PKK/YPG Resurgence or Resistance*: Despite their territorial losses, PKK/YPG elements may attempt to regroup or exploit local tensions, posing a direct threat to Türkiye's national security and Syria. Conversely, a cooperative settlement remains an alternative if the group opts to disarm.
3. *Regional Rivalries and External Interference*: Competing interests from regional and global actors, including Iran, Russia, and the U.S., could complicate Türkiye's diplomatic efforts, delaying stabilization and reconstruction.
4. *Economic and Humanitarian Challenges*: The need for reconstruction in Syria may strain resources, while large refugee populations could create additional social and economic pressure for Türkiye.

Türkiye's approach involves balancing conflictual and cooperative strategies, focusing on strengthening centralized authority, promoting national unity, enhancing regional diplomacy, and activating multilateral engagement to mitigate these risks.

The following table outlines Türkiye's mediation strategies, highlighting key risks and opportunities across four dimensions of its policy toward Syria.

TABLE 6 TÜRKİYE'S RISKS AND OPPORTUNITIES IN 2025			
Dimensions	Potential Risks	Opportunities	Türkiye's Mediation Strategies
Establishing a Centralized Authority	Fragmentation of militias leading to instability	Consolidation of state institutions and governance structures	Facilitating disarmament and integration of militias into national forces
Building a Unified Syria	Persistence of PKK/YPG resistance in certain areas; failure to demobilize armed groups, leading to prolonged instability	Elimination of separatist threats and restoration of territorial integrity; potential for cooperative engagement if YPG lays down arms and accepts political integration	<i>Conflictual Option:</i> Supporting joint operations with Syria to eliminate PKK/YPG elements. <i>Cooperative Option:</i> Promoting negotiations, reintegration mechanisms, and political settlement if YPG disarms.
Strengthening Regional Diplomacy	Conflicting regional interests undermining diplomatic efforts	Regional cooperation through Arab League, OIC, and GCC	Promoting regional frameworks and partnerships for stability

PALESTINE-ISRAEL: Deepening Uncertainty



Muhammed Hüseyin
Mercan

07

SUMMARY OF 2024

- 1 Israel's war on Gaza, backed by the U.S. and Europe, sparked global protests and legal cases, challenging the country's international standing.
- 2 Netanyahu expanded the war to Lebanon and Iran, risking regional conflict, while the U.S. urged restraint.
- 3 Israel's theo-political motives fueled expansionism, threatening regional stability and Türkiye's security interests.
- 4 Future stability depends on U.S. policies under Trump, with Türkiye and allies likely playing key roles in cease-fire talks and Gaza's reconstruction.

2024: THE YEAR OF GENOCIDE

The support given to Tel Aviv by the U.S. and mainstream European powers has greatly emboldened Benjamin Netanyahu and his cabinet to escalate the scale of massacres in Gaza. The Zionist leadership has indiscriminately massacred people in the enclave throughout 2024, targeting Hamas and other resistance groups, aiming to eliminate any Palestinian political identity. Tel Aviv, which has enjoyed an exceptional position in the international arena thanks to the protective and legitimizing action-discourse strategy of institutionalized democracies, has faced new existential challenges in 2024 through the cases at the Court of Justice (ICJ) and the International Criminal Court (ICC). The growing anti-Israel demonstrations all over the world meant that the occupying state's comfortable position in global politics had been shaken and a process had begun for which it would have to pay a heavy price in the coming years.

The trauma caused by the strategic defeat in Gaza and the growing international anti-Israel sentiment has strengthened public opposition to the government. To restore the state's image in the international community and regain the psychological upper hand, Netanyahu has taken a succession of moves to expand the frontiers of the war. In the course of the genocide in Gaza, the Zionist government has severely damaged the infrastructure while at the same time significantly increasing the pressure on South Lebanon. The Netanyahu government, which opened a second front in the face of Hezbollah's attacks, tried to turn the course of the war in its favor by targeting senior Hamas and Hezbollah figures. Despite the demands of the international community and the efforts of international mediators, the Netanyahu government, which did not warm to the idea of a cease-fire in Gaza, managed to deal a heavy blow to the process, especially with the assassination of Hamas' political leader Ismail Haniyeh in Tehran.



Türkiye is doing much more for Palestine, Gaza, and Lebanon than what is seen, spoken and reflected in the press. We will stand by our brothers and sisters with all our strength and means until the genocide stops and Palestine is completely liberated. The closest witnesses of Türkiye's strong support for the just struggle of the Palestinian people are our brothers and sisters in Palestine and Gaza.

Recep Tayyip Erdoğan/18.12.2024

Seeking to spread the war across the region to regain strong support from the international community, Netanyahu sparked a possible Israeli-Iranian war with attacks on senior figures of Hezbollah and the Iranian Revolutionary Guards. The attack on the Iranian consulate in Damascus in early April raised the war cries between Tehran and Tel Aviv. Although the Iranian government's low-level retaliation against this attack eased the tension between the two states to some extent, the Zionist administration's assassinations of Haniyeh and Hezbollah Secretary-General Hassan Nasrallah, reignited the possibility of war between the two sides. Even though Tel Aviv signaled war in the face of a stronger retaliation from the Iranian side than before, the damage and cost of a major war in the region led the U.S. administration to restrain Netanyahu. During the long months dominated by the prospect of war between Iran and Israel, Tel Aviv has continued its genocide in Gaza.

“Türkiye is doing much more for Palestine, Gaza, and Lebanon than what is seen, spoken and reflected in the press. We will stand by our brothers and sisters with all our strength and means until the genocide stops and Palestine is completely liberated. The closest witnesses of Türkiye's strong support for the just struggle of the Palestinian people are our brothers and sisters in Palestine and Gaza.” Recep Tayyip Erdoğan/ 25.11.2024

Unlike the occupying state's aggression against Gaza or the West Bank in previous years, this time, the loudly voiced religious references were the main motive that differentiated its genocide and aggressive expansionism in 2024. The new strategy, based on Jewish theo-politics, accelerated an occupation-centered approach in South Lebanon and Syria besides Palestinian territory.

Due to the failure of the international community to demonstrate a strong will to end the massacres and rein in the pathological political mind of the occupation state during 2024, the Netanyahu government continued the genocide in Gaza uninterrupted in front of the eyes of the entire world. In addition, Netanyahu did not compromise on his aggressive expansionist strategy by taking advantage of the opportunity gaps created by the fragilities in the

region, leaving 2025 with a bleak outlook for the future of the Palestinian-Israeli conflict and the stability of the region.

DYNAMICS THAT MAKE PEACE IMPOSSIBLE

Considering the conflict's main dynamics, two main issues make it difficult or even impossible to reach a compromise between the parties. The *first* is Israel's irrational security concerns adopted in the realpolitik framework. The strategy of marginalizing Palestinian resistance groups increases the Tel Aviv administration's aggression. Since this issue negatively affects the security and stability of the Palestinian territories and the region, it directly concerns the regional politics of countries such as Türkiye.

The *second* fundamental issue that does not allow for a permanent solution in the Palestinian territories is the expansionist strategy pursued by the Zionist leadership on theo-political ground. Developing a vision of order concerning the "promised land" narrative, Israel uses a language that threatens the territorial integrity of not only Palestine but also other countries in the region. Looking at the status quo after Operation Al-Aqsa Flood, Israel's aggressive attitude toward Lebanon and Syria and its support for the PYD/YPG terrorist organizations are the most concrete indicators of this religious expansionism.

"If we fail to mobilize the international community, this third and most violent Gaza war will not be the last. Therefore, we need to work with all our strength for a lasting solution." Hakan Fidan/ 10.12.2024

The occupying state's religious reading-centered approach directly affects Türkiye's policies toward the Palestinian-Israeli conflict. Throughout 2024, Türkiye's steps and calls to reduce the rising tensions in the region and stop the genocidal policies of the Netanyahu government are well known. Ankara's efforts undoubtedly aim to establish lasting stability in the Middle East. However, the Israeli government's attitude and threatening language, disregarding moral and legal norms, necessitates Türkiye further to reinforce its position in the context of the conflict.

Ankara has three main constants regarding the situation on the ground. Within the framework of a principled and internationally lawful foreign policy approach, Türkiye's top priority is to end the genocide committed by



If we fail to mobilize the international community, this third and most violent Gaza war will not be the last. Therefore, we need to work with all our strength for a lasting solution.

Hakan Fidan/ 10.12.2024

Israel and hold the perpetrators responsible. Secondly, within its traditional foreign policy stance, East Jerusalem is a red line for Türkiye. The Zionist regime's continued occupation of East Jerusalem and its refusal to return to the borders set out in U.N. Security Council Resolution 242 will not allow for an end to the conflict. This will also remain the main reason for the fragility of Türkiye's policy toward Israel. The third main constant for Ankara in Israel's aggressive expansionist and aggressive policies is Tel Aviv's support for terrorist organizations.

“Türkiye has been one of the most principled and humanitarian countries on the Palestinian issue. Those who resort to all kinds of lies through all conventional and new media tools at their disposal to denigrate Türkiye's stance should know that Türkiye is always with its Palestinian brothers and sisters and will continue to support them regardless of the circumstances.” Fahrettin Altun/Head of Communications, Republic of Türkiye/ 08.04.2024

The Zionist administration's alliance with elements that pose a threat to Türkiye's national security is among the main motives that will negatively affect the stability of the region and deepen the climate of conflict. In this respect, it would be appropriate to say that the main dynamics of the conflict on the Palestinian-Israeli axis are closely related to Türkiye's security and foreign policy strategy. Developments in 2024 are in line with this argument.

IS PEACE PROJECTION POSSIBLE IN 2025?

A paradigm shift is needed to end the tragedy in Palestine and prevent similar massacres from happening again. The actions of a state that produces politics according to Jewish religious law and legitimizes the occupation by massacring people mustn't be considered within the scope of self-defense. At this point, Western institutionalized democracies must take action and impose various sanctions against Tel Aviv. Otherwise, Israel's aggression will not end.

Notwithstanding the failure of all attempts in 2024, there is hope worldwide for a new era in the US. The January 16th ceasefire between Israel and Palestine, although it coincided with Biden's final days in office, will be remembered as Trump's first act before taking office. If he fulfils his campaign promises, Trump will play an important role in building a more stable Middle East. Otherwise, Tel Aviv may be encouraged to pursue more aggressive policies.

Recent developments in Syria have also created a new equation regarding the Israeli-Palestinian process and the approaches of both the U.S. and Türkiye. The White House must implement a strict strategy for Israel's withdrawal from the areas it occupies in Syria to take steps toward peace and stability. The

Trump administration's pursuit of a strictly pro-Israel policy will deepen the uncertainty in the region and hinder the construction of a stable order in both Palestine and Syria.

To balance the growing fragility and risks in the Middle East, the new U.S. administration is expected to take some steps toward a cease-fire in Gaza. Türkiye, Egypt, and Qatar will directly support such an initiative. Ankara needs to be more considered in the Palestinian issue in the Trump era to make positive progress. Therefore, the U.S. administration may request that Türkiye establish communication with Hamas during the negotiations on a cease-fire. In addition, since the reconstruction of Gaza will be on the agenda with the announcement of a possible truce, Türkiye's contribution to the process in coordination with Egypt, Saudi Arabia, Qatar, and the UAE is a foreseeable issue for 2025.

Accordingly, the sine qua non for any projection of peace in the region is the end of the genocide in Gaza, the departure of the occupation army from the Palestinian territory, and Tel Aviv's definitive abandonment of its occupation plans in Lebanon and Syria. Failure by the White House to take steps in this direction in the coming weeks will lead to an even greater tragedy in Palestine in 2025 and a fragile transition in Syria. This will, of course, lead Ankara to develop alternative strategies in regional politics. If the Trump administration does not take steps to limit the Netanyahu government, taking measures against Israel's policies that threaten both the stability of the region and Türkiye's national security will be among Ankara's main priorities in 2025.



Türkiye has been one of the most principled and humanitarian countries on the Palestinian issue. Those who resort to all kinds of lies through all conventional and new media tools at their disposal to denigrate Türkiye's stance should know that Türkiye is always with its Palestinian brothers and sisters and will continue to support them regardless of the circumstances.

**Fahrettin Altun/
Head of Communications,
Republic of Türkiye/ 08.04.2024**

TABLE 7 TÜRKİYE'S POTENTIAL POSITION TOWARD ISRAEL'S GAZA AGGRESSION IN 2025

Main Dynamics	Expectations for 2025	Impact on Turkish Foreign Policy
Israel's aggressive expansionism and genocide in Gaza	Continued international protests and legal challenges against Israel.	Strengthened calls for international accountability and human rights advocacy.
Netanyahu's regional provocations and U.S. involvement	Heightened tensions with Lebanon and Syria, risking wider conflict.	Deepened regional diplomacy to counter Israeli expansionism.
Iran's diminishing role and Israeli targeting of Hezbollah	Increased regional instability due to unresolved Israeli-Iranian confrontations.	Enhanced cooperation with Arab states to stabilize Syria and Lebanon.
Türkiye's principled stance on East Jerusalem and Palestinian rights	Türkiye reinforcing its red lines on Jerusalem and pushing for accountability.	Increased efforts to mediate in Gaza's reconstruction and cease-fire talks.
Potential U.S. policy shifts under Trump	Potential U.S.-backed cease-fire initiatives involving Türkiye, Qatar, and Egypt.	Strategic adaptation based on U.S. policies, including communication with Hamas.

TÜRKİYE-İRAN RELATIONS

Cautious Neighborhood and Regional Rivalry



İsmet Horasanlı

08

SUMMARY OF 2024

- 1 In Syria, the Iran-backed Bashar Assad regime fell and the opposition came to power, pursuing policies closer to Türkiye.
- 2 Important developments took place in Türkiye's Iraq policy. Serious progress was made in the Development Road Project and an agreement was reached to counter terrorism.
- 3 Negotiations on the Zangezur Corridor continued. Iran opposed the project.
- 4 Iran's nuclear program returned to the agenda. The EU parties to the JCPOA threatened Iran with the "trigger mechanism."

INTRODUCTION

Türkiye and Iran are two important countries in the Middle East, both historically and culturally, as well as in terms of state tradition. They share historical similarities as well as geopolitical rivalries in the region. Therefore, regional changes directly or indirectly affect their relations. In addition, Iran's ties with global actors also affect the dynamics of rivalry and cooperation between the two countries. At the regional level, the developments in Iraq, the regime change in Syria, and the Zangezur Corridor connecting Azerbaijan to Nakhchivan are of regional, and geopolitical significance, and closely concern both countries. Elsewhere, there are three main dynamics West-Iran dispute: Tehran's nuclear program, its missile program, and Iran-backed militias. Amid the ongoing tensions, Türkiye, on the other hand, has adopted a cautious and prudent foreign policy, taking a clear stance on Iran's nuclear program and the resulting sanctions, while trying to stay out of the two other issues as much as possible.

MAIN DYNAMICS

Iraq: Development Road Project, Counterterrorism

The Turkish-led Development Road Project will connect the Persian Gulf to Europe through Iraq and Türkiye via a highway and railway. It will also connect cities with strong historical ties to Türkiye, such as the Gulf, Baghdad, and Mosul. Since the line will pass through cities like Karbala and Najaf, which are extremely important to the region, its opening will significantly increase Ankara's soft power in the region based on its historical ties. In that context, Türkiye's significant impact on various social segments in Iraq, should not be overlooked.

In addition to cultural issues, the Development Road Project could bring significant benefits to Türkiye. In fact, with the completion of the project,

the trade volume between Türkiye and Iraq – currently at \$20 billion – is estimated to reach \$30-\$40 billion. This will allow Türkiye to play a more active role in the Iraqi markets.

The year 2024 was eventful. On April 22, 2024, President Recep Tayyip Erdoğan visited Iraq for the first time in 13 years, and a Memorandum of Understanding (MoU) on the Development Road Project was signed.¹ Later, on Aug. 29, 2024, a ministerial summit was held in Istanbul between Iraq, Türkiye, Qatar and the United Arab Emirates (UAE), all parties to the project.² In addition, Türkiye and Iraq have signed several important agreements and held high-level meetings on different issues, particularly counterterrorism. The visit of the chief of the Turkish General Staff, the head of the National Intelligence Organization (MIT) and the foreign minister to Baghdad on March 14 is proof of this.³

Iran's influence over Iraq is gradually diminishing and Shiite cleric leaders in Iraq have frequently criticized Tehran. Muqtada al-Sadr, once the most important pro-Iranian leader, has been critical of Iran's interventions in Iraq, and his positive comments on the fall of the Assad regime testify to this feeling.⁴ Türkiye's successful initiatives and the gradual decline of Iran's influence have also raised voices within Iran, with some assessments suggesting it has fallen behind its neighbors, especially Türkiye and Saudi Arabia, in regional competition, citing the example of the Development Road project.⁵ From Türkiye's viewpoint, the project is not seen from the perspective of regional superiority, but rather as a springboard for increased cooperation among the countries of the region.

Syria: Regime Change

Türkiye is Syria's neighbor with which it shares the longest border (911 kilometers), while also hosting the largest number of Syrian refugees due to the 13-year civil war. However, the former Baathist regime in Syria had for many

1 Timour Azhari, Ece Toksabay, Ahmed Rasheed, "Iraq and Türkiye to elevate security, economic ties after Erdogan visit", Reuters, April 22, 2024, <https://www.reuters.com/world/middle-east/Turkiyes-erdogan-iraq-push-reset-ties-cooperation-against-pkk-2024-04-22/>, [Accessed on: January 12, 2025].

2 Bilgay Duman, "Kalkınma Yolu Projesi umut veriyor", AA, August 31, 2024, <https://www.aa.com.tr/tr/analiz/kalkinma-yolu-projesi-umut-veriyor/3317669>, [Accessed on: January 12, 2025].

3 "Sayın Bakanımızın Irak Cumhuriyeti'ne Ziyareti, 14 Mart 2024, Bağdat", T.C. Dışişleri Bakanlığı, March 14, 2024, <https://www.mfa.gov.tr/sayin-bakanimizin-irak-cumhuriyeti-ni-ziyareti--14-mart-2024--bagdat.tr.mfa>, [Accessed on: January 12, 2025].

4 "Mukteda Sadr: Muntazeer-e tashkeel-e dovlat-e demokratik dar Suriya hastim", BBC, December 9, 2024, <https://x.com/bbcpersian/status/1866122812919881798>, [Accessed on: January 12, 2025].

5 Hoda Ahmadi, "Akab oftaden az hamsayeh", Tejaret-e Farda, November 16, 2024, <https://www.tejaratefarda.com/fa/tiny/news-48132>, [Accessed on: January 12, 2025].

years distanced itself from Türkiye, and turned the country into a military and political maneuvering ground for Iran. So much so that Iran not only supported the regime, but also sent trained militia groups directly from Iran to Syria, and in some cases kept high-ranking commanders under the name of consulting. These militias were also involved in activities against Türkiye from time to time. Despite all this, Ankara called the Assad regime to negotiations and sought to resolve its security concerns, especially refugees and border security, through peaceful means. Türkiye's stance was met with harsh reactions even by the opponents of the Assad regime. However, when the Assad regime did not respond to calls for compromise, Türkiye had no reason to hold back the opposition any longer. Thus, the opposition moved from Idlib and captured Damascus in just 11 days.

This development has gone down in history as a turning point for the region and has brought about significant changes both nationally and regionally. While on the one hand, the 53-year rule of the Baathist regime fell, on the other hand, Iran, which defined Syria as its "strategic depth," lost its influence there.⁶ Meanwhile, Türkiye's influence has naturally increased as opposition groups with pro-Turkish policies have come to power. Thus, just as Assad was replaced by the opposition, Türkiye and Iran shifted their places in terms of regional geopolitical influence.

South Caucasus: Zangezur Corridor

The Zangezur Corridor was another important issue where Türkiye and Iran, as two regional powers, faced each other. Iran reacted negatively to the construction of the corridor and was in favor of providing a similar passage even through its territory. There are two main reasons for Iran's negative reaction to the opening of the corridor. First, Tehran does not want to lose its border with Armenia and thus with the South Caucasus. From Iran's point of view, it interprets the issue as the protection of geographical borders. However, since the corridor passes through Armenian territory, Iran is not legally bound.

Second, Iran sees the growing influence of Türkiye, which it considers a regional rival, and its direct connection to the Turkic republics as a negative development. Unable to find a legally rational justification for this, Iran has developed the rhetoric of "geopolitical change is our red line."⁷ However, the

6 İsmet Horasanlı, "İran'ın Suriye'de kaybettikleri ve olasılıklar", Sabah, January 11, 2025, <https://www.sabah.com.tr/yazarlar/perspektif/ismet-horasanli/2025/01/11/iranin-suriyede-kaybettikleri-ve-olasiliklar>, [Accessed on: January 12, 2025].

7 Mohammad Jamshidi official X account, <https://x.com/MhmmmdJamshidi/status/1700473326550839478>, [Accessed on: January 12, 2025].

reality on the ground is based on international law and agreements rather than Iran's red lines.

Iran's Nuclear Program

Although Iran's nuclear program was initiated by the United States under the "Atoms for Peace" program, it is currently one of the key contentions between the two countries. In this context, the agreement between Iran and the five permanent members of the U.N. Security Council plus Germany, known as the Joint Comprehensive Plan of Action (JCPOA), signed after two years of negotiations, is important. Under this agreement, Iran will continue its nuclear activities under U.N. supervision for peaceful purposes only, without posing a threat to international security. In return, the embargoes on Iran will be suspended for a period of time and will be completely lifted if Iran fulfills its responsibilities. The suspension of EU and U.N. sanctions is guaranteed by U.N.-2231, which expires on Oct. 18, 2025.⁸ Accordingly, the U.N. sanctions on Iran will remain suspended until Oct. 18, 2025, unless one of the parties activates the "trigger mechanism," after which they will be completely lifted. In other words, the EU parties to the JCPOA only have until Oct. 18, 2025, to reimpose sanctions.

Türkiye has always had a clear position on Iran's nuclear program. Accordingly, it has emphasized that Iran's nuclear program should be used for peaceful purposes, while also disapproving of any discrimination against Iran in this regard. According to Türkiye's official position, the nuclear program developed for non-peaceful purposes should be prevented, but this position should not be applied only to Iran as a double standard. In a 2018 speech, President Erdoğan said the embargo imposed on Iran was not right and that it was destabilizing the balance in the world.⁹ However, Türkiye also opposes a confrontational approach to the dispute over Iran's nuclear program, arguing that such an approach would lead to further regional instability.

2025 PROJECTIONS

In line with the developments in 2024, Iran's activities in the region, its nuclear program, its policy toward the Zangezur Corridor, and its development path will still be on the agenda in 2025. In this respect, the new era in Syria is a loss for Iran that cannot be replaced in the short term. Since Iranian officials referred

8 "Resolution 2231 (2015) on Iran Nuclear Issue", United Nation, https://main-un-org.translate.google.com/translate/en/content/2231/background?_x_tr_sl=en&_x_tr_tl=tr&_x_tr_hl=tr&_x_tr_pto=tc, [Accessed on: January 12,2024].

9 "Cumhurbaşkanı Erdoğan: İran yaptırımlarını doğru bulmuyoruz", AA, November 6, 2018, <https://www.aa.com.tr/tr/gun-un-basliklari/cumhurbaskani-erdogan-iran-yaptirimlarini-dogru-bulmuyoruz/1303816>, [Accessed on: January 12,2024].

to Syria as the country's strategic depth, it is unlikely they will give up easily a country that is so important to them. Therefore, Iran will try different ways, including making a deal with the new Syrian government. It is also likely to ask Türkiye to mediate in this direction. Türkiye, on the other hand, does not want to exclude Iran as part of its "common position" policy toward the region. However, based on its experience, it will adopt a cautious attitude.

Two other issues of great importance for regional geopolitics are the Zangezur Corridor and the Development Road Project. Iran opposes the Zangezur corridor because it believes that it will change its natural borders and cut its connection with the Caucasus. Furthermore, the corridor is not welcomed by Iran because it will directly connect Türkiye with the Turkic republics by bypassing Iran. Under current circumstances, Türkiye's land connection with the Turkic Republics and Russia is mainly through Iran. Thus, Iran not only has the position to observe the connecting lines there but also benefits financially. Iran does not want the financial loss it would incur with the opening of the corridor and cannot accept being left out of this political equation. That is why it values platforms such as the 3+3 negotiating format. In 2025, it will similarly try to bargain a role by prolonging the process through negotiations in which it will propose a partial passage of the corridor through Iran. Thus, Tehran will not be left out and will be able to overcome other reservations. However, question marks remain on whether these proposals will be welcomed by the other parties.

Unlike the Zangezur Corridor, Iran is not opposed to the Development Road Project. Iran's dominance of the Strait of Hormuz allows it to control the transit, while also considering the potential cooperation opportunities it could offer. In addition, the International North-South Transport Corridor (INSTC) from India to Russia and Europe via Iran, is unlikely to be in function under current conditions.¹⁰ Therefore, there is no obstacle to the Development Road Project, and the completion of the Grand al-Faw Port by 2025 is expected to lead to significant progress in the other pillars of the project. Therefore, the Development Road Project could lead to a cooperative relationship between Ankara and Tehran in 2025.

Another issue that will be on the agenda for Iran in 2025 will be Iran's nuclear program. This is because U.N. Resolution 2231, which suspends U.N. sanctions against Iran, expires in October 2025. The U.N. embargoes will then be fully lifted unless the JCPOA parties activate the Trigger Mechanism. There-

10 Umud Shokri, "North-South Transport Corridor: Iran-Russia New Railway to Circumvent Western Pressure", Gulf International Forum, <https://gulrif.org/north-south-transport-corridor-iran-russia-new-railway-to-circumvent-western-pressure/>, [Accessed on: January 13, 2025].

fore, there will be intense diplomacy between the EU and Iran on the nuclear issue until October 2025. However, the new Donald Trump administration's policy toward Iran will also be on Tehran's agenda. According to Trump, a deal with Iran should cover its nuclear program, ballistic missiles and militia forces in the region without any time limit. Failing to reach such a deal with Iran, he is likely to return to a policy of "maximum pressure" and impose harsh economic sanctions. In return, Iran will try to revive the JCPOA or strike a similar deal. Failing that, it will try to buy time and survive the Trump era with minimal damage.

In this direction, the continuation of the current conjuncture is a positive situation in terms of Türkiye-Iran trade volume. Despite the U.S. sanctions, trade volume between the two countries has followed a positive curve due to the suspension of the EU and U.N. sanctions. However, if the EU and U.N. sanctions are reapplied, it will hurt the Türkiye-Iran trade. In addition, a possible increase in migration from Iran to Türkiye due to the economic difficulties caused by Trump's maximum pressure policy can also be characterized as negative.

However, Türkiye's position on Iran's nuclear program will not change. Ankara is not only against non-peaceful nuclear programs but also against the one-sided application of nuclear proliferation and sanctions on Iran. In addition, Türkiye does not approve of sanctions against Iran and argues that military intervention is not a solution.

TABLE 1 TÜRKİYE-İRAN 2025 EXPECTATIONS

Topic	Türkiye	Iran	Potential Outcomes
Regime Change in Syria	Its influence over Syria has increased	Its influence over Syria has decreased	Iran may ask Türkiye for mediation
Development Road Project	Is one of the main actors of the project. Its influence in Iraq has increased	Saw it as a controllable project	Possible areas of cooperation may emerge
Zengazur Corridor	Considers it an important opportunity and gain	Sees it as a change in geopolitics and natural borders to its detriment	3+3 negotiations will likely continue
Iran's Nuclear Program	Opposes both nuclear proliferation and sanctions and is not in favor of military intervention	Prepares for Trump's new term and possible sanctions	The maximum pressure policy returns. Türkiye-Iran trade may be negatively affected

TÜRKİYE-AFRICA RELATIONS



Tunç Demirtaş

09

SUMMARY OF 2024

- 1 Türkiye and Egypt relations entered a normalization period with reciprocal visits of President Erdoğan and Egyptian President Abdel-Fattah el-Sissi.
- 2 Foreign Minister Hakan Fidan, intelligence chief İbrahim Kalın, Defense Minister Yaşar Güler, Energy Minister Alparslan Bayraktar, Defense Industry President Haluk Görgün, and Deputy Minister of Trade visited Niger.
- 3 The Third Africa-Türkiye Ministerial Review Conference was held in Djibouti.
- 4 The Ankara Process initiated between Ethiopia and Somalia was successfully concluded under the leadership of President Erdoğan.

TÜRKİYE-AFRICA PARTNERSHIP IN 2024

The year 2024 has been transformative for Türkiye's relations with the African continent. Efforts in economic, diplomatic, political, and defense sectors, along with signed agreements and official visits, have enabled the deepening of the Türkiye-Africa partnership. Ankara's win-win foreign policy approach, aligned with the continent's development goals, has contributed to a sustainable growth momentum in bilateral relations.

By the first 11 months of 2024, Türkiye's foreign trade volume reached \$550 billion, with Africa's share standing at \$26.8 billion. Trade with North African countries like Egypt, Algeria, Libya, and Morocco reached remarkable levels. Trade with Egypt approached \$7 billion, while Libya and Algeria emerged as significant partners in energy and raw material trade. In Sub-Saharan Africa, economic relations deepened with countries like South Africa, Senegal, and Ghana, where trade grew in agriculture, mining, and industry sectors. While trade volumes remained low in the early months of the year, surges in April and June sustained growth trends, reflecting a strengthening and sustainable Türkiye-Africa economic cooperation.¹

In the diplomatic and political domains, Türkiye's relations with African nations gained significant momentum. High-level visits in 2024 supported Türkiye's vision of strategic partnership with the continent. President Recep Tayyip Erdoğan's visit to Egypt on Feb. 14, 2024, marked a pivotal moment in the normalization of Türkiye-Egypt relations. Egyptian President Abdel-Fattah el-Sissi's visit to Türkiye in September further solidified this

¹ TÜİK, Ülke Gruplarına Göre Dış Ticaret, <https://data.tuik.gov.tr/Bulten/DownloadIstatistikselTablo?p=T1ErTKbkvsfgrOUQ/9oEX/DVK2Zo8CxJDpAKioUF3RIRjGtJCxcBPozpyM4MQJXj>, <https://data.tuik.gov.tr/Bulten/DownloadIstatistikselTablo?p=024DWKJ1sweF9A1pw9YvK5w9fzeF-HB0WUtRVwtuokCrpNhp9Hb/TpVfMoVuc22gh>, (Accessed: December 2, 2024).

process.² The visit of Tanzanian President Samia Suluhu Hassan to Türkiye demonstrated the deepening of relations with East Africa. Furthermore, the Türkiye-Africa Partnership Third Ministerial Review Conference held in Djibouti underlined Türkiye's commitment to strengthening cooperation with the African Union.³

Türkiye's facilitating role in resolving the Ethiopia-Somalia crisis in 2024 represented a critical step toward regional peace. The Ankara Process, initiated in July 2024, reestablished diplomatic dialogue between the two nations, culminating in the Ankara Declaration signed on Dec. 11, 2024, achieving reconciliation. This process further reinforced Türkiye's role as a reliable mediator and peace facilitator, enhancing its regional and global influence.⁴

In the defense and security sectors, Türkiye emerged as a key player in Africa through military cooperation agreements and training programs. In 2024, agreements were signed with countries such as Somalia, Guinea-Bissau, Gambia, Egypt, Cote d'Ivoire, and Senegal. The EFES 2024 Exercise held in İzmir laid the groundwork for deeper military cooperation.⁵ The SAHA EXPO Fair, where Türkiye showcased its defense industry products, attracted considerable interest from African nations, increasing collaboration opportunities. Türkiye's Naval Task Force operations in Somalia contributed to regional security and stability, further strengthening the strategic partnership between the two nations.⁶

The progress achieved in the economic, diplomatic, and defense sectors in 2024 has solidified the foundations of a sustainable and strategic Türkiye-Africa partnership. Türkiye's needs-based foreign policy approach has increased African countries' trust in Türkiye as a reliable partner, contributing to political and economic stability. Moving forward, Türkiye's influence on the continent is expected to deepen further through humanitarian diplomacy,

2 "Mısır Cumhurbaşkanı Sisi bugün Türkiye'ye resmi ziyarette bulunacak", Anadolu Ajansı, 03.09.2024, <https://www.aa.com.tr/tr/gundem/misir-cumhurbaşkanı-sisi-bugun-türkiyeye-resmi-ziyarette-bulunacak/3320427>, (Access Date: 3 December 2024)

3 African Union, "The Third Africa-Türkiye Ministerial Review Conference", November 2, 2024, <https://au.int/en/newsevents/20241102/third-africa-türkiye-ministerial-review-conference>, (Access Date: 4 December 2024)

4 Tunç Demirtaş, "Türkiye's Peace Diplomacy in the Horn of Africa", SETA, December 12, 2024, <https://www.setav.org/en/focus/turkiyes-peace-diplomacy-in-the-horn-of-africa>, (Access Date: 5 December 2024)

5 "EFES-2024 Tatbikatı başarıyla tamamlandı", Anadolu Ajansı, May 30, 2024, <https://www.aa.com.tr/tr/gundem/efes-2024-tatbikati-basariyla-tamamlandi/3234898>, (Access Date: 6 December 2024)

6 "SAHA EXPO çok sayıda işbirliği anlaşmasına ev sahipliği yapıyor", Anadolu Ajansı, October 23, 2024, <https://www.aa.com.tr/tr/savunma-sanayisi/saha-expo-cok-sayida-isbirligi-anlasmagina-ev-sahipligi-yapiyor/3371553>, (Access Date: 4 December 2024)

economic projects, and defense collaborations. The 4th Türkiye-Africa Partnership Summit, scheduled for 2026, holds critical importance in defining the future roadmap of this strategic partnership.

KEY DYNAMICS OF RELATIONS WITH AFRICA IN 2024

In 2024, Türkiye solidified its position as a reliable actor in Africa by strategically deepening its relations and consolidating its influence. Türkiye expanded its presence across economic, political, diplomatic, and security dimensions, offering tailored solutions based on mutual needs while respecting local dynamics, on-the-ground realities, and sensitivities. Notably, normalization with Egypt, increased cooperation in the Sahel region, counterterrorism support, and facilitation of the Ethiopia-Somalia crisis emerged as key dynamics throughout 2024.

Normalization with Egypt

Steps taken on Feb. 14 to normalize relations between Türkiye and Egypt were particularly noteworthy for Türkiye-Africa relations in 2024. Following President Erdoğan's visit to Cairo in February, Egyptian President Abdel Fattah el-Sisi's visit to Ankara in September marked a major milestone in restoring diplomatic rapprochement. This normalization process opened pathways for strategic partnerships not only in the Eastern Mediterranean and the Middle East but also in North and East Africa.

"As Türkiye, we want to walk this challenging path together with the African continent. We base our relations on mutual respect and trust.

We act with the understanding of equal partnership and mutual benefit in every step we take. We want to increase the wealth of this continent, not decrease it. We believe that African solutions should be found to Africa's problems." Hakan Fidan/ 3.11.2024

Within the scope of normalized relations, 17 cooperation agreements were signed across various sectors, including energy, trade, defense industry, and agriculture. Egypt emerged as a critical partner for Türkiye in energy projects, and joint initiatives in Libya paved the way for greater stability in North



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Hakan Fidan/ 3.11.2024

Africa. One of the most significant achievements during this process was the cooperation between Türkiye and Egypt to establish stability in the Horn of Africa and the Red Sea regions. This development presented an important opportunity for fostering stability, peace, and reconciliation in Africa.

Counterterrorism Efforts

Türkiye's counterterrorism support in Africa stood out as one of the most prominent dynamics. Ankara's assistance to the Somali government in combating al-Shabaab significantly enhanced the reliability of Türkiye's model in Africa. This support encompassed military training and Turkish defense industry equipment, contributing to counterterrorism efforts in various regions. A fundamental aspect of Türkiye's approach was addressing the root causes of terrorism by combining military cooperation with education, development, and social projects.⁷

Increased Cooperation with the Sahel Region

The Sahel region emerged as the focal point of strategic transformation in 2024, becoming a geography where global and regional powers intensified their competition. Notably, France experienced a decline in its influence in the region. Türkiye, however, increased its weight and influence as a constructive actor, providing contributions aligned with the needs of Sahel countries. Türkiye bolstered its economic and security-based partnerships in the Sahel.

In 2024, Türkiye developed relations in countries such as Niger, Mali, and Burkina Faso through a combination of soft power and security cooperation. By supplying defense industry products, Türkiye enhanced the counterterrorism capacities of legitimate governments in the region, positioning itself as a significant actor in regional security. Military training programs and operational support provided by Türkiye in the Sahel played a crucial role in fostering the region's stability.⁸

Mediation Efforts

One of Türkiye's most notable achievements in 2024 was its successful mediation between Ethiopia and Somalia to prevent a regional war and ensure peace and security there. Consolidating its image as a reliable actor, Türkiye

7 "Türkiye's Contributions to International Community's Efforts to Fight Terrorism", Republic of Türkiye Ministry of Foreign Affairs, 17 November 2024 https://www.mfa.gov.tr/turkiye_s-contributions-to-international-community_s-efforts-to-fight-terrorism.en.mfa, (Access Date: 5 December 2024)

8 "Türkiye'den kritik zamanda Nijer çıkarması", Anadolu Ajansı, July 17, 2024, <https://www.aa.com.tr/tr/analiz/turkiyeden-kritik-zamanda-nijer-cikarmasi/3277541>, (Access Date: 5 December 2024)

resolved the conflict through the *Ankara Process*, achieving a peaceful and cooperative solution. The process facilitated constructive dialogue between the parties and culminated in the signing of the Ankara Declaration on Dec. 11, 2024. The agreement safeguarded Somalia's territorial integrity, national sovereignty, and independence while ensuring Ethiopia's access to the sea for commercial purposes. Türkiye's role in this process not only ended tensions between the two countries but also created an environment for peace and stability in the Horn of Africa. Following this success, Türkiye leveraged the trust and model it established in Africa to initiate mediation efforts between Sudan and the UAE, further solidifying its position as a key regional mediator.⁹

PROSPECTS FOR 2025

In 2025, Türkiye is expected to shape its engagement with Africa through collaborations at various levels and institutions. In this context, alongside hard-power issues, such as security and defense as well as other critical issues including climate change, environment, education, humanitarian aid, technology transfers, and cultural topics are expected to gain more prominence. Additionally, new initiatives in mediation, such as Somalia-Somaliland talks and mediation efforts in Sudan, are also expected.

Another significant prospect pertains to rising security risks in the Red Sea and East Africa. The increasing presence of the Daesh terrorist group in Somalia, which reportedly reached 1,200 members by the end of 2024, remains a major security concern in the region. Coupled with increased Iranian support for the Houthis in Yemen, the security risks stemming from Daesh's presence in the region could escalate threats toward the Gulf of Aden and the Red Sea. This is expected to amplify the geopolitical importance of the Horn of Africa and intensify Israel-Houthi tensions.

A key expectation for 2025 is the anticipated increase in geopolitical competition across different regions of the continent. While actors such as the United States, China, Russia, the European Union, Gulf countries, India, and Brazil continue efforts to expand their influence, Türkiye is expected to consolidate its position as an alternative and reliable actor in Africa. As a result of France's declining influence, particularly in the Sahel and West Africa, Paris will likely attempt to compete with Ankara in East Africa. In 2025, France's influence in countries like Chad and Senegal is expected to weaken further.

⁹ Tunç Demirtaş, "Türkiye's Peace Diplomacy", SETA, 13 December 2024, ...", <https://www.setav.org/en/focus/turkiyes-peace-diplomacy-in-the-horn-of-africa>. (Access Date: 14 December 2024)

Finally, the competition between the United States and China in Africa is also expected to intensify in 2025. Projects such as the Lobito Corridor, the Build Back Better World (B3W) initiative, and potential programs aimed at protecting wildlife and natural habitats in Southern Africa may amplify competition between the two global powers. These project areas are of strategic importance due to their critical minerals and mining resources. The struggle for influence and control over these regions holds the potential to deepen the geopolitical and economic competition between the U.S. and China there.

TABLE 8 TÜRKIYE-AFRICA RELATIONS IN 2025

Regions	Key 2025 Projections	Risks	Opportunities
North Africa	Türkiye-Egypt trade exceeding \$8 billion; joint energy projects.	Political instability in Libya; Türkiye-Egypt energy competition.	Leadership in renewable energy; logistics centers in North Africa.
East Africa	Increased Türkiye-Somalia trade; mediation talks (Sudan-UAE); security support.	Growing Daesh threats; Iranian and Houthi activities.	New energy corridors via Somali ports; peace process leadership in Somalia-Somaliland.
Sahel Belt	Deepened economic and military cooperation; expanded humanitarian aid.	Rising terrorist influence; climate crises.	Leadership in peace processes; infrastructure financing via Eximbank and TİKA.
West Africa	Collaboration in education and technology; oil and gas investments with Nigeria.	Political instability in Nigeria.	Defense exports expansion; leadership in smart agriculture projects.
Central Africa	Defense and energy projects with Cameroon, Chad, and Congo.	Security issues, lack of infrastructure, and competition with China.	Renewable energy and resource-focused infrastructure projects in the Congo Basin.
Southern Africa	Collaboration in education, health, tourism, and technology sectors.	Intensifying U.S.-China competition; bureaucratic challenges.	High-tech partnerships with South Africa; leadership in education and health sectors.

THE BALKANS: Stability Facing Multiple Risks



Mehmet Uğur Ekinci

10

SUMMARY OF 2024

- 1 While no conflict erupted, tensions persisted, particularly over Kosovo's unilateral actions and Serbia's countermeasures. Bosnia and Herzegovina faced a political crisis due to Republika Srpska's rejection of national institutions, and North Macedonia experienced a shift toward political conservatism under VMRO-DPMNE.
- 2 Montenegro and Albania made progress in EU accession, but disputes in North Macedonia and Serbia's non-compliance with sanctions against Russia hindered their progress. Bosnia and Herzegovina's integration stalled due to unmet conditions.
- 3 Romania's elections highlighted Euroskeptic gains and Russian interference. Bulgaria faced continued electoral instability, and Serbia dealt with mass protests. Montenegro saw growing divisions among its leadership.
- 4 Türkiye maintained strong relations through high-level engagements and contributed to regional security via NATO operations, bilateral agreements, and defense industry exports, including Bayraktar TB2 UAV sales to Bosnia and Herzegovina and Croatia.

In 2024, although no conflict occurred in the Balkans, the region's security situation remained precarious. The Kosovo issue, one of the key regional disputes, caused intermittent tensions. Despite ongoing EU-mediated dialogue between Serbia and Kosovo, neither took any concrete step toward normalizing relations. The Kosovo government's unilateral actions, such as banning Serbian dinar transactions, shutting down Serbian institutions in the north, and declaring the opening of the Ibar Bridge, drew criticism from Western powers. Serbia, meanwhile, responded by announcing new measures to protect ethnic Serbs in Kosovo.

Bosnia and Herzegovina also faced persistent political challenges throughout the year.

Disagreements among the country's three constituent elements hindered decisionmaking, causing the EU to withhold the first installment of its Growth Plan for the country. The state crisis deepened as Republika Srpska (RS) President Milorad Dodik challenged both the Office of the High Representative (OHR) and the Constitutional Court. As the RS National Assembly passed laws, rejecting decisions by these institutions, Dodik faced trial at the Court of Bosnia and Herzegovina starting in February.

North Macedonia's political direction shifted dramatically after the May elections, which brought the center-right VMRO-DPMNE back to power with a strong mandate. The party, now controlling both the presidency and the government, opposed constitutional changes demanded by Bulgaria and the EU regarding the Bulgarian minority. Furthermore, following an appeal by VMRO-DPMNE, the Constitutional Court began reviewing the Law on the Use of the Albanian Language, triggering strong opposition from ethnic Albanian parties.

The region's EU integration process produced mixed outcomes. While Montenegro and Albania made concrete progress in opening and closing chapters, North Macedonia's dispute with Bulgaria and Serbia's refusal to implement sanctions against Russia prevented their advancement. Accession negotiations with Bosnia and Herzegovina did not start as the country failed to meet the conditions.



We aim to strengthen our close relations with European countries in a multidimensional manner in 2025 in order to eliminate the threats and challenges of the current conjuncture and to take advantage of the opportunities.

Hakan Fidan/10.12.2024

“We aim to strengthen our close relations with European countries in a multidimensional manner in 2025 in order to eliminate the threats and challenges of the current conjuncture and to take advantage of the opportunities.” Hakan Fidan/10.12.2024

Political tensions and instability were widespread across the region. Romania's December 2024 elections resulted in unexpected gains by Euroskeptic candidates and parties. Although the Liberal and Social Democratic Parties formed a coalition government, the Constitutional Court annulled the presidential election after finding evidence of Russian interference. Bulgaria held its sixth snap parliamentary election since 2021 in October, where GERB-SDS won by a large margin but failed to secure a coalition majority.

In Serbia, a tragic accident at the Novi Sad Railway Station claimed 15 lives, sparking mass protests against alleged government corruption in public projects. Montenegro's political scene was dominated by a growing rift between President Jakov Milatovic and Prime Minister Milojko Spajic, who were formerly co-founders of the Europe Now Movement in the governing coalition.

Turkish-Balkan relations remained positive throughout 2024. High-level diplomatic engagement intensified, resulting in Strategic Cooperation Council meetings with Albania (twice), Romania, and Serbia, each yielding multiple bilateral agreements. While continuing to support the region's stability, development, and Euro-Atlantic integration, Türkiye also contributed to regional security through bilateral and multilateral military cooperation, including leading NATO's Kosovo Force and participating in the MCM Black Sea Task Force with Bulgaria and Romania to clear floating mines. Türkiye's defense industry expanded its regional presence with TB2 UAV sales to Bosnia and Herzegovina, and Croatia.

MAIN CHALLENGES TO REGIONAL STABILITY

Salience of Ethnic Politics

Politics in the Balkans remains heavily influenced by ethno-nationalist discourses. Political leaders frequently employ ethnic-based arguments for populist purposes, finding receptive audiences due to lingering unresolved issues. Ethnic considerations occasionally strain bilateral relations, as seen in North Macedonia's ongoing dispute with Bulgaria and Greece's demands regarding the protection of the Greek minority in Albania. A notable development in 2024 was the establishment of the All-Serb Assembly, initiated by Serbian President Aleksandar Vucic, RS President Dodik, and Serbian Orthodox Church Patriarch Porfirije to unite global Serbian communities in response to perceived geopolitical challenges. Given the transnational nature of ethnic identities, such initiatives risk undermining inter-ethnic relations in the region.

The Kosovo Issue

The lack of normalization between Serbia and Kosovo continues to pose significant challenges for regional security. Belgrade and Pristina maintain firm positions, with Serbia insisting on establishing the Community/Association of Serb Municipalities while Kosovo emphasizes sovereignty and reciprocity as non-negotiable principles. Policies undertaken by the Albin Kurti government to address security challenges and ensure constitutional order in the north of the country are perceived by Serbia as aimed at the intimidation and forced emigration of the Serb population. The EU, despite facilitating dialogue since 2011, has been unable to compel either side to implement previously agreed points.

Internal Divisions in Bosnia and Herzegovina

Bosnia and Herzegovina have an extremely complex political system with state-level, two entity-level, and 10 cantonal governments, further complicated by power-sharing arrangements between three constituent peoples (i.e., Bosnians, Serbs, and Croats). Nationalist parties representing each constituent group maintain distinct and often conflicting visions for the country's future. Serb leader Dodik advocates for returning to what he terms the "original" Dayton Agreement format, essentially seeking to strengthen entity-level powers at the expense of state institutions. His secessionist rhetoric and denial of genocide have raised concerns among Bosniaks and international observers. Simultaneously, Croat nationalist parties press for greater administrative representation, with some even advocating for the establishment of a third, Croat-majority entity.

Return of Nationalists to the Macedonian Government

North Macedonia's recent political shift has re-exposed ethno-national issues affecting both domestic politics and external relations. VMRO-DPMNE's return to power has strained relations with Bulgaria, as the party consistently opposes constitutional amendments required for EU negotiations while advocating for changes to the negotiation framework itself. The Constitutional Court's review of the Albanian language law has reignited debates about language rights that were previously settled, albeit controversially, in 2019.

Political Uncertainties

Domestic politics in other Balkan countries are marked by uncertainties. Bulgaria has yet to form a stable government since early 2021. Romania's December 2024 elections revealed both political volatility and vulnerability to external interference. Montenegro faces political divisions between its president and prime minister, while the opposition Democratic Party of Socialists demands early elections, citing declining support for the governing coalition and portraying Serb nationalists in the government as a threat to the country's democracy and independence. In Serbia, opposition movements have regained prominence, particularly among university students, despite weak parliamentary representation. Populism remains widespread across the region, while Euroskepticism is notable in countries like Serbia, Bulgaria, and Romania.

Other Security Challenges

The region faces common socioeconomic and environmental challenges that affect stability and development. Uneven regional development, high living costs, and widespread corruption negatively impact daily life. The brain drain continues as young, qualified individuals seek opportunities in Western Europe and the United States, contributing to population decline. Natural disasters, including floods, wildfires, and earthquakes, occur frequently, with countries often struggling to manage prevention and recovery efforts due to limited resources.

PREDICTIONS FOR 2025

In 2025, the north of Kosovo and Bosnia and Herzegovina will remain the areas most prone to crisis. The Kosovo normalization dialogue faces an uncertain future, as both Vucic and Kurti retain strong domestic support and show no inclination to compromise on their core positions.

In Bosnia and Herzegovina, political fragmentation and disputes among nationalist parties may cause tensions at any time. The outcome of Dodik's

trial could significantly impact the country's stability. His potential non-compliance with an adverse ruling might trigger a serious crisis. Any attempt to enforce such a decision, whether by state institutions or the OHR, could face physical resistance and lead to dangerous escalation. Conversely, failure to enforce a ruling would severely undermine the country's constitutional order.

Ethnic tensions may rise in North Macedonia in 2025. A Constitutional Court decision to repeal the language law, either partially or entirely, could reignite debates about minority language rights. Regarding its dispute with Bulgaria, the VMRO-DPMNE-led government will face the difficult choice of either reversing its position and risking domestic backlash or maintaining its stance and delaying the country's EU accession process.

Donald Trump's return to the U.S. presidency could affect regional dynamics. The extent of U.S. involvement in Balkan affairs under a second Trump administration remains uncertain, potentially leaving the EU with greater responsibility for managing political crises. Washington might pursue pragmatic deals focusing on economic or political cooperation, similar to its September 2020 initiative for Kosovo and Serbia. While such efforts could reduce immediate tensions, they are unlikely to resolve fundamental disputes.

Trump's presidency could embolden populist leaders in the region. Although Dodik's suggestion that he might declare RS independence under a second Trump presidency appears unlikely given probable opposition from Washington and other international actors, he may attempt to leverage a more transactional approach by Washington to regional issues. Serbian President Vucic might also expect greater flexibility from Washington regarding Serbia's Russia policy and the Kosovo issue. Kurti's stronger domestic position could lead to a more direct confrontation with Washington if he continues to reject Western advice for a compromise solution. Additionally, increased U.S. pressure against cooperation with China could affect regional dynamics, particularly Belgrade's strategic partnership with Beijing.

Critical elections will take place in some Balkan countries in 2025. Parliamentary elections are scheduled in Kosovo for February and in Albania for May. Romania will conduct a new presidential election in spring 2025, following the Constitutional Court's annulment of the December 2024 results. Bulgaria will likely face another parliamentary election due to ongoing difficulties in forming a government. The outcomes of these elections could have implications beyond national borders.

The region's political uncertainties may create opportunities for external actors to expand their influence. Involvement in the domestic affairs of a Balkan

country by extra-regional powers or neighboring countries could exacerbate existing political disputes and instability.

Turkish-Balkan relations are expected to remain positive in 2025. Türkiye will likely continue its comprehensive engagement with all regional countries and communities across political, economic, military-defense, social, and cultural spheres. As Balkan governments maintain pragmatic cooperation with Türkiye, relations in the defense, energy, and construction sectors are expected to deepen further. In the event of regional crises, Türkiye's balanced position could enable it to serve as an effective mediator between opposing sides.

THE SOUTHERN CAUCASUS: A Delicate Year



Mehmet Salah Devrim

11

SUMMARY OF 2024

- 1 The peace talks between Armenia and Azerbaijan have progressed to a certain degree but seem to have reached a point where they are stalled.
- 2 The recent elections in Georgia have sparked nationwide protests. Following these elections, Prime Minister Irakli Kobakhidze's government has decided to suspend the EU membership application process until the end of 2028.
- 3 While the region has not returned to active conflict, none of the grievances of the past decades have been resolved yet. If regional normalization does not progress the chance of active conflict remains.

The years 2023 and 2024 marked a period of change in regional dynamics, particularly in the Southern Caucasus, which was notably affected by these changes. The Southern Caucasus region is a key bridge connecting Asia and Europe and the shortest way to connect China to Europe and vice versa. The region saw great interest from many foreign actors, with Europe, China, the United States, Russia, Iran, and Türkiye all being involved in regional politics to some degree. In 2024 regional peace-building measures were the focus. However, most of the issues that persisted in 2024 remain. The region is suspended in a fragile peace and it could rapidly regress into a state of war if developments in 2025 were to go for the worse.

STABILITY

In contrast to previous years, the South Caucasus region experienced a relative absence of tensions in 2024. While there is a continued emphasis on the development of infrastructure in the region, nothing concrete and substantial has materialized yet. The Crossroads of Peace project, the port project in Anaklia, the supply of Turkmen gas to Europe via Azerbaijan as well as possible railroad projects between Türkiye and Armenia are some of the developments in this area. But, other than the port of Anaklia all other projects only exist on paper. A notable development in early 2024 was Armenian Prime Minister Nikol Pashinyan's proposed non-aggression pact with Azerbaijan in late January.¹ Although the agreement was not signed, this proposal signified a shift in regional dynamics away from conflict resurgence. However, the Armenian constitution remains a major obstacle to a comprehensive peace deal

¹ "Armenia PM proposes non-aggression pact to Azerbaijan", Euractiv, 29 January 2024, <https://www.euractiv.com/section/azerbaijan/news/armenia-pm-proposes-non-aggression-pact-to-azerbaijan/> (Access Date: December 28 2024)

as it includes territorial claims in Azerbaijan.² Yerevan has initiated plans for a constitutional referendum in 2027.³

As part of the border delimitation process between Azerbaijan and Armenia, the issue of four Azerbaijani villages under Armenian control emerged in March 2024.⁴ These villages were subsequently returned to Azerbaijan in May.⁵ In that context, Pashinyan notably remarked, “What is Armenia is Armenia; what is not Armenia is not Armenia,” signaling a pragmatic approach to territorial disputes.⁶

Further developments in 2024 included the phased withdrawal of Russian peacekeeping forces from the Karabakh region.⁷ Russia announced its intent to withdraw in April, with the peacekeeping mission officially concluding in June. This withdrawal was completed, with no personnel, weapons, or equipment remaining in the region.⁸ At the end of 2024, Russia also withdrew its border guards from the Armenia-Iran border checkpoints, leaving the security of Armenia to Armenian border guards. The withdrawal was completed on Dec. 30, with Armenia being formally in charge starting Jan. 1, 2025.⁹

Meanwhile, a normalization process between Türkiye and Armenia also advanced. In July 2024, Armenian National Assembly representative Ruben Rubinyan and Türkiye’s Ambassador Serdar Kılıç convened for the fifth meeting of special representatives since 2021. Unlike previous meetings, this session was held at the Margara-Alican border crossing between Armenia and Türkiye. Key topics included the

2 Burç Eryugur, “Azerbaijan says territorial claims in Armenia’s constitution ‘main obstacle’ in signing peace deal”, Anadolu Agency, 27 August 2024, <https://www.aa.com.tr/en/world/azerbaijan-says-territorial-claims-in-armenia-s-constitution-main-obstacle-in-signing-peace-deal/3314534> (Retrieved on 27 December 2024)

3 Azatutyun , “Armenian Constitutional Referendum ‘Planned For 2027’”, Azatutyun, 29 August 2024, <https://www.azatutyun.am/a/33098341.html> (Access Date: December 28 2024)

4 Elena Teslova, “Azerbaijan demands return of 4 villages under occupation of Armenia”, Anadolu Agency, 9 March 2024, <https://www.aa.com.tr/en/europe/azerbaijan-demands-return-of-4-villages-under-occupation-of-armenia/3160285> (Access Date: December 27 2024)

5 Al Jazeera, “Armenia returns four border villages to Azerbaijan as part of deal”, Al Jazeera, 24 May 2024, <https://www.aljazeera.com/news/2024/5/24/armenia-returns-four-border-villages-to-azerbaijan-as-part-of-deal> (Access Date: December 27 2024)

6 Eurasianet, “Armenian PM signals willingness to make territorial concessions to facilitate border deal”, Eurasianet, 28 March 2024, <https://eurasianet.org/armenian-pm-signals-willingness-to-make-territorial-concessions-to-facilitate-border-deal> (Access Date: December 28 2024)

7 Gabriel Gavin, “Russia announces total withdrawal of troops from Nagorno-Karabakh”, Politico, 17 April 2024, <https://www.politico.eu/article/russia-withdrawal-troops-nagorno-karabakh-azerbaijan-armenia/> (Access Date: December 28 2024)

8 Burç Eryugur “Russian peacekeepers withdraw completely from Karabakh: Azerbaijan”, Anadolu Agency, 12 June 2024, <https://www.aa.com.tr/en/world/russian-peacekeepers-withdraw-completely-from-karabakh-azerbaijan/3247852> (Retrieved on December 28 2024)

9 Azatutyun , “Russian Border Guards Leave Armenia-Iran Checkpoint”, Azatutyun, 30 December 2024, <https://www.azatutyun.am/a/33258387.html> (Access Date: 31 December 2024)

operationalization of the Akhurik-Akyaka railway crossing and the simplification of visa requirements for diplomatic and official passport holders.¹⁰

In October 2024, the third iteration of the 3+3 South Caucasus Regional Cooperation Platform convened in Istanbul.¹¹ The meeting included the Foreign Ministers of Azerbaijan, Armenia, Iran, Russia, and Türkiye. Georgia, citing its strained relations with Russia, abstained for the third consecutive year. The primary objective of the platform remains the promotion of lasting peace and stability in the region. While issues of connectivity and regional integration were featured on the agenda, the overarching focus was regional stability.

While Azerbaijan and Armenia experienced relative domestic and regional stability in 2024, Georgia faced significant political and social turbulence. The year began with the resignation of Prime Minister Irakli Garibashvili, who was succeeded by Irakli Kobakhidze. In May, the passage of the controversial Georgian draft law on the transparency of foreign influence, which had previously sparked widespread protests and opposition, exacerbated internal divisions. This was followed by national elections in October, the results of which further polarized the country.

Adding to the unrest, the government's decision to suspend Georgia's European Union membership process until the end of 2028 has intensified domestic and international tensions. This move, coupled with recent legislative actions, has drawn sharp criticism from the international community, casting doubt on Georgia's Euro-Atlantic trajectory. The EU has responded by halting military aid, suspending financial support, and freezing Georgia's candidacy status. Concurrently, the United States has imposed sanctions and initiated a reassessment of its bilateral relationship with Georgia.

These developments have left Georgia increasingly isolated both diplomatically and economically. This isolation, coupled with growing internal dissent, threatens to undermine domestic stability and heightens regional vulnerabilities. Unless the Georgian government takes decisive steps to realign with democratic principles and international norms, the country's prospects for stability and integration with Western institutions remain uncertain.¹²

10 Hoory Minoyan, "Special envoys from Armenia and Turkey hold talks at the border", *The Armenia Weekly*, 31 July 2024, <https://armenianweekly.com/2024/07/31/special-envoys-from-armenia-and-turkey-hold-talks-at-the-border/> (Access Date: December 28 2024)

11 "Third Meeting of the 3+3 Regional Cooperation Platform, 18 October 2024, Istanbul", Republic of Türkiye Ministry of Foreign Affairs, 18 October 2024, <https://www.mfa.gov.tr/3-3-guney-kafkasya-bolgesel-isbirligi-platformunun-ucuncu-toplantisi--18-ekim-2024--istanbul.en.mfa> (Access Date: December 28 2024)

12 Claire Mills, "The impact of Georgia's 'foreign influence' law", United Kingdom Parliament House of Commons, 16 October 2024, <https://commonslibrary.parliament.uk/research-briefings/cbp-10047/> (Access Date: December 28 2024)

INTERNAL AND EXTERNAL DYNAMICS

The three primary dynamics that shaped the previous year – normalization, regionalism, and diversification – continue to dominate the Southern Caucasus region in the current year.

Normalization refers to the process of addressing and resolving historical grievances among the countries and populations of the region, which have long been characterized by animosity and mutual distrust. This dynamic seeks to foster the establishment or resumption of neighborly relations between states, contributing to a more stable and cooperative regional environment. The second dynamic, regionalism, emphasizes the prioritization of regional interests by the countries of the Southern Caucasus. While major regional powers like Iran, Russia, and Türkiye have traditionally driven this focus, smaller states – Armenia, Azerbaijan, and Georgia – have increasingly embraced this approach. Within this framework, the normalization process is often pursued either bilaterally or through regional mechanisms such as the 3+3 format. The objective of regionalism is to minimize the impact of negative external influences on regional dynamics while leveraging positive contributions from external actors.

A key player in this context has been Armenia and its Prime Minister Nikol Pashinyan. Historically, Armenia’s political posture has been shaped by its adherence to the concept of “Historic Armenia” and a reluctance to fully embrace the realities of “Real Armenia.” This stance has often led to reliance on external sponsors and patrons to advance its strategic goals.¹³ However, under Pashinyan’s leadership, there has been a shift toward redefining Armenia’s role within the region, aligning more closely with regionalism and normalization principles. By limiting this negative external influence unwilling to accept realities on the ground Armenia has been making steady progress in its relations with Azerbaijan and Türkiye.

The concept of diversification, defined as “the diversification of roads and relations” and extending to “beyond regional cooperation,” holds increasing relevance in the evolving geopolitical dynamics of the Caucasus. This principle is reflected in the efforts of regional actors to mitigate dependence on singular alliances or infrastructural routes, favoring a multi-faceted approach to connectivity and partnerships. For instance, Türkiye’s Middle Corridor strategy emphasizes investment in alternative routes to the 100-million-ton

13 Hrant Gadarigian “Pashinyan Calls on Citizens to Focus on “Real, Not Historic Armenia””, *Hetq*, 10 April 2024, <https://hetq.am/en/article/165645> (Access Date: December 28 2024)

capable Northern Corridor railway that runs through Russia,¹⁴ demonstrating a commitment to broadening access to European and Asian markets. Similarly, Azerbaijan's initiatives to integrate Turkmen gas into the Southern Gas Corridor display their willingness to diversify the energy transit to Europe, offering alternatives to Russian-dominated channels.¹⁵ However, the future of these projects and whether they become substantial alternatives to existing infrastructure remain uncertain.

Moreover, Armenia's growing engagement with Western institutions reflects a parallel pursuit of diversification in diplomatic and economic ties, despite its historical reliance on Russia. China's increasing infrastructure investments, such as the Anaklia deep-sea port project in Georgia, further highlight diversification as a critical strategic aim for external stakeholders, aiming to solidify their foothold in a region traditionally dominated by Russia.¹⁶ These initiatives showcase the importance of diversification in fostering resilience, reducing regional dependencies, and advancing cooperative frameworks that transcend traditional alliances. However, in the long term, this means the entry of more actors into the region.

THE ROAD AHEAD: NORMALIZATION, REGIONALIZATION, DIVERSIFICATION

The normalization process in 2024 has taken some slow and steady steps. It reached a point where all sides signal that the risk of war has greatly diminished. The normalization process in the Southern Caucasus region is likely to continue. Despite remaining challenges, Azerbaijan and Armenia are likely to make gradual progress in their peace negotiations. Partial agreements may emerge on less contentious issues, such as border demarcation or the facilitation of trade. However, constitutional amendments in Armenia, necessary to resolve claims over Azerbaijani territories, will remain a stumbling block, deferring comprehensive normalization until at least 2027. Bilateral confidence-building measures, such as joint infrastructure projects, could help

14 Arnold C. Dupuy, "There's an alternative to Russian-based trade routes—but it needs support from the US, EU, and Turkey", *Atlantic Council*, 22 May 2024, <https://www.atlanticcouncil.org/blogs/turkeysource/theres-an-alternative-to-russian-based-trade-routes-but-it-needs-support-from-the-us-eu-and-turkey/> (Access Date: 24 December 2024)

15 Nikola Mikovic, "Turkmenistan's Energy Pivot: A Potential Solution to Europe's Gas Woes?", *WGI World*, 19 July 2024, <https://www.wgi.world/turkmenistan-s-energy-pivot-a-potential-solution-to-europe-s-gas-woes/> (Access Date: December 28 2024)

16 Aksana Akhmedova & Ketevan Gelashvili, "Impact of Chinese Investment in Anaklia: Strategic Implications for Georgia and Europe", *China Observers*, 10 July 2024, <https://chinaobservers.eu/impact-of-chinese-investment-in-anaklia-strategic-implications-for-georgia-and-europe/> (Access Date: December 28 2024)

sustain dialogue. Türkiye-Armenia Relations will also see advancements, but their progress may be slower and continue to be tied to Azerbaijan-Armenia relations. Building on previous talks, Ankara and Yerevan may announce incremental measures, such as the opening of border and rail roads to facilitate regional trade.

The regionalization of the Southern Caucasus is inherently bound to the normalization process between its members. Georgia may continue to abstain from the regional 3+3 format due to its tensions with Russia. Meanwhile, Türkiye, Iran, and Russia will emphasize the importance of maintaining this platform to stabilize the region and counterbalance external influences. The Crossroads of Peace project is so far the only concrete initiative presented by the sides, however, its feasibility remains uncertain.

Diversification is a dynamic that will play a key role in 2025, albeit less than normalization. Türkiye and Azerbaijan will likely advance projects such as the Middle Corridor and Southern Gas Corridor to diversify energy transit routes and reduce reliance on Russian pipelines. Azerbaijan may also strengthen partnerships with Turkmenistan to connect Central Asian energy supplies to Europe. China's growing role in the region should not be underestimated either. China will continue investing in regional infrastructure, such as the Anaklia deep-sea port in Georgia, and potentially expand its involvement in transport and energy projects. This reflects the region's increasing shift toward diversification of partnerships beyond traditional actors like Russia and the West.

Western engagement in the Southern Caucasus may experience a decline, particularly as Georgia's decision to suspend its European Union membership process for the foreseeable future has significantly strained its relations with the bloc. This shift presents challenges for Armenia, a landlocked state whose closest access to the EU is through Georgia. With EU-Georgia relations deteriorating, Armenia may increasingly pivot toward regional formats for cooperation, emphasizing engagement within mechanisms like the 3+3 platform.

While the EU's influence in the region may wane, NATO is poised to deepen its engagement in the Southern Caucasus. Both Georgia and Azerbaijan already maintain established relationships with NATO or its member states, reflecting the alliance's strategic interest in the region. Following the election and the recently halted EU membership process, Georgia's continued relationship with the EU and NATO faces uncertainty. Armenia, on the other hand, has expressed interest in distancing itself from the Collective Security Treaty Organization (CSTO). However, its exit from the CSTO is unlikely in the short term, as it remains contingent on the stabilization of Armenia's relations with its regional neighbors. These dynamics suggest that about external factors there is a reigning unpredictability in the region. While some countries

seem to be itching closer to the west, others are distancing themselves from it. Developments in the region are slow and steady giving an overall positive outlook but critical developments will likely take some time.

TABLE 9 EXPECTATIONS IN SOUTH CAUCASUS IN 2025

Outcomes in Türkiye's Security Landscape	Plausible Outcome	Probable Outcome	Preferable Outcome
Azerbaijan	Stagnation of the peace process	Slow progress and incremental progress in border demarcation	Progress in the peace negotiations
Armenia	Increased resistance against normalization from within the country	Incremental normalization with Türkiye through border openings	Incremental normalization with Türkiye
Georgia	Protests in Georgia escalated forcing either a renewed pro-western or an increasingly authoritarian leadership	Georgia continues to spiral into Russia's orbit	Georgia balances its relationship between the West and Russia
Russia	Russia pivots to an offensive stance in the region following its exit from Syria	Russia refocuses on the Southern Caucasus region increasing engagement with regional countries	A cooperative but limited Russian presence in the region especially within the 3+3 format

CONFRONTING TERRORISM IN 2024: Navigating Threats and Regional Shifts



Sibel Düz

12

SUMMARY OF 2024

- 1 Jan. 12 – Nine Turkish soldiers were martyred and four others were wounded in an infiltration attempt by the PKK terrorist group in the north of Iraq.
- 2 Aug. 15 – Türkiye and Iraq entered a memorandum of understanding focused on security, military, and counterterrorism collaboration, encompassing enhanced measures against PKK terrorists and the creation of joint military training and cooperation facilities.
- 3 Oct. 23 – A terrorist attack on the Turkish Aerospace Industries (TAI) headquarters in Ankara left at least five people dead and 22 others injured.
- 4 Nov. 26 – Minister of Defense Yaşar Güler declared the completion of a “security shield” in Operation Claw Lock which lasted nearly three years, targeting the PKK terrorist strongholds in northern Iraq.

In 2024, Türkiye faced significant security challenges, particularly concerning the PKK terrorist organization, and witnessed substantial geopolitical shifts in the region.

In January, an infiltration attempt on a Turkish temporary security post in northern Iraq, where nine Turkish soldiers were martyred and four others wounded, underscored the persistent threat posed by the PKK and highlighted the need for collaboration with regional actors in mitigating terrorist threats. In August, Türkiye and Iraq signed a memorandum of understanding (MoU) to enhance cooperation in security, military, and counterterrorism efforts. The agreement includes establishing a Joint Security Coordination Center in Baghdad and a Joint Training and Cooperation Center in Bashiqa, aiming to strengthen collaborative measures against the PKK and other terrorist threats.

In October, a terrorist attack targeted the headquarters of Turkish Aerospace Industries (TAI) in Ankara, resulting in at least five deaths and 22 injuries. The assailants, who arrived by taxi, detonated explosives and opened fire before being neutralized by security forces. The PKK claimed responsibility for the attack, marking the revival of the terrorist threat on Turkish soil. In November, Defense Minister Yaşar Güler announced the completion of a “security shield” in northern Iraq’s Zap region. Operation Claw-Lock, spanning nearly three years, aimed to dismantle the PKK’s operational capabilities, and enhance border security.

“I would like to emphasize once again that our fight against terrorism will continue until we fully establish the security of our borders, that there will be no place for any terrorist organization in the region, and that we will never allow any *fait accompli*.” Yaşar Güler/ Defense Minister of Türkiye/31.12.2024

These events reflect a year of heightened security concerns for Türkiye. In 2025, Türkiye will face persistent challenges from the PKK and YPG across

Iraq and Syria. Transformative changes in neighboring Iraq and Syria, where the overthrow of the Assad family rule, offer opportunities for Türkiye to consolidate gains. However, Ankara must navigate increasing diplomatic pressure as it balances security priorities with regional stability.

MAIN DYNAMICS OF THE ISSUE: 3NS

The developments in 2024 have created both security challenges and opportunities for Türkiye. By capitalizing on new regional collaborations and post-Assad dynamics, Türkiye can enhance its fight against terrorism while solidifying its influence in Syria and Iraq.



I would like to emphasize once again that our fight against terrorism will continue until we fully establish the security of our borders, that there will be no place for any terrorist organization in the region, and that we will never allow any fait accompli.

**Yaşar Güler/Defense Minister
of Türkiye/31.12.2024**

New Threats

The year 2024 underscored the persistent threat posed by the PKK, particularly through its ability to infiltrate Turkish military outposts in northern Iraq, revealing vulnerabilities in Türkiye's temporary military positions, and prompting concerns over the PKK's growing operational capabilities. If these infiltrations persist, Türkiye may face difficulties in maintaining its strategic military presence across the north of Syria and Iraq, particularly in securing key buffer zones.

Additionally, the Oct. 23 terrorist attack on TAI underscored the PKK's evolving strategy to target critical infrastructure.¹ Attacks on defense companies or energy pipelines could disrupt Türkiye's economic stability and weaken its domestic security apparatus. The risks are compounded by the PKK's ability to exploit Türkiye's expanding industrial footprint, forcing the government to allocate greater resources toward protecting these vital sectors.

A concerning development in 2024 was the PKK's anti-drone missile and kamikaze drone capacity, demonstrated through targeted attacks on Turkish unmanned aerial vehicles (UAVs) and Turkish posts.² This new tactic especial-

1 Sibel Düz, "TUSAŞ Yerleşkesine Terör Saldırısı", *SETA*, Ekim 2024, <https://www.setav.org/uzmanlar-cevapliyor/tusas-yerleskesine-teror-saldirisi>, (Access Date: 17 December 2024)

2 Levent Kemal, "PKK's new-tech missiles fuel Turkey's suspicion of Iranian role", *Middle East Eye*, 10 June 2024, <https://www.middleeasteye.net/news/pkk-new-tech-fuels-turkey-suspicions-iran>, (Access Date: 15 December 2024)

ly poses a direct threat to Türkiye's air superiority and intelligence-gathering capacity, which rely heavily on drone technology for surveillance and counter-terrorism operations. Countries supporting the PKK³, including through advanced weapon systems, exacerbate Türkiye's security challenges by enabling the group to maintain leverage.

“The PKK terrorist organization poses a serious threat to the national security of Türkiye and Iraq. With the aim of jointly combating this common threat, we intensified our contacts with Iraq in 2024, focusing on joint security and counter-terrorism.” Hakan Fidan/Foreign Minister of Türkiye/10.12.2024

On the other hand, the fall of Syria's Bashar Assad regime on Dec. 8 has further complicated the power struggle there. As the Syrian branch of the PKK, the YPG now faces the risk of losing its “gains” in Syria, it could intensify clashes between the Syrian National Army (SNA) and the Syrian Democratic Forces (SDF) east of the Euphrates.

New Collaborations

The MoU between Türkiye and Iraq marked a turning point in their counterterrorism cooperation. By enhancing military and security coordination, both nations are better positioned to limit the PKK's operational freedom in Iraq. The agreement includes provisions for joint military training and intelligence sharing, as well as the creation of joint security centers. This collaboration allows Türkiye to expand its cross-border operations while maintaining regional legitimacy.

For Baghdad, banning PKK operations⁴ brings economic and political benefits, fostering closer ties with Ankara while ensuring territorial sovereignty. The MoU is vital for transforming Türkiye's ability to eliminate PKK strongholds, particularly in areas like Sinjar and the Qandil Mountains. Enhanced



The PKK terrorist organization poses a serious threat to the national security of Türkiye and Iraq. With the aim of jointly combating this common threat, we intensified our contacts with Iraq in 2024, focusing on joint security and counterterrorism.

**Hakan Fidan/Foreign Minister
of Türkiye/10.12.2024**

3 Ragıp Soylu, “Has the PKK acquired kamikaze drones to hit Turkish aircraft?” *Middle East Eye*, 22 March 2024, <https://www.middleeasteye.net/news/turkey-pkk-acquired-kamikaze-drones-aircraft>, (Access Date: 15 December 2024)

4 “Iraq outlaws 3 parties over links with terrorist PKK”, *Anadolu Agency*, 6 August 2024, <https://www.aa.com.tr/en/middle-east/iraq-outlaws-3-parties-over-links-with-terrorist-pkk/3296355>, (Access Date: 14 December 2024)

cooperation is also vital for preventing the PKK from exploiting Iraq's political fragmentation, thus reducing the terrorist group's capacity for regional destabilization.

New Opportunities

The fall of the Assad regime presents a significant opportunity for Türkiye to shape Syria's future security sector. As one of the most prominent regional powers, Türkiye can play a central role in rebuilding Syria's governance structures, ensuring that terrorist groups like the PKK/ YPG are excluded from any political processes. By supporting a security sector reform (SSR) in Syria, Türkiye can help establish a unified national force, reducing the influence of terrorist groups and militias.

SSR in Syria also directly benefits Türkiye's counterterrorism strategy by creating a buffer against the PKK/YPG in the north of Syria. A restructured Syrian security sector, aligned with Türkiye's objectives, can curb cross-border PKK threats and reinforce Türkiye's territorial security. Additionally, Türkiye can leverage its role to secure broader international support for its anti-terrorism operations, further isolating the PKK and its affiliates.

PREDICTIONS FOR 2025

Meanwhile, the potential for reconciliation between Türkiye and the PKK has gained renewed attention due to recent political developments. However, the initiative's future remains uncertain. President Recep Tayyip Erdoğan's endorsement suggests a potential shift in policy, possibly influenced by regional instability, especially emerging from Syria and Israel. However, the PKK's recent attacks, including the assault on TAI, have intensified doubt on the feasibility of negotiations. Additionally, the complex dynamics in neighboring Syria and Iraq complicate the reconciliation process.

In other words, while the recent political overtures by the Nationalist Movement Party (MHP) leader, Devlet Bahçeli,⁵ and the tentative support from President Erdoğan indicate a potential change, the path forward is fraught with challenges. The success of any peace initiative will depend on the willingness of all parties to engage in meaningful dialogue, especially the PKK agreeing to lay down weapons and navigate the intricate regional dynamics that influence the conflict.

⁵ Oman Al Yahyai, "Hardline Turkish politician offers Öcalan parole if PKK is disbanded", *Euronews*, 22 October 2024, <https://www.euronews.com/2024/10/22/hardline-turkish-politician-offers-ocalan-parole-if-pkk-is-disbanded>, (Access Date: 17 December 2024)

Moreover, the anticipated U.S. withdrawal from Iraq in 2025⁶ will introduce a power vacuum, significantly affecting both the PKK and Iraq's political landscape. Without American presence, Iraq's central government may struggle to maintain control over volatile regions like Sinjar and the Qandil Mountains, where the PKK operates. This scenario creates two potential outcomes:

- **PKK Gains Political Ground:** The PKK could exploit the weakened Iraqi state to consolidate its political influence, particularly in areas with Kurdish populations. The increased political influence of Iran may embolden the group to strengthen its presence, presenting a renewed threat to Türkiye's regional security interests.
- **PKK Loses Legitimacy:** Alternatively, Türkiye and Iraq's deepened security collaboration – solidified by the August 2024 MoU – could accelerate efforts to eliminate the PKK. Without U.S. interference, Iraq may rely heavily on Türkiye for counterterrorism support, forcing the PKK into retreat.

In either case, Türkiye's proactive military posture will be crucial in shaping the outcome, ensuring the PKK does not exploit the U.S. withdrawal to expand its influence.

Furthermore, the post-Assad power vacuum will bring significant risks in 2025, particularly in eastern Syria, where the SNA forces clash with the PKK/YPG. These hostilities pose a major challenge to any transitional government's pursuit of national cohesion. Türkiye's support for the SNA reflects its determination to counterbalance the PKK/YPG's dominance within the SDF (Syrian Democratic Forces), but this strategy will face increasing diplomatic challenges.

- **Washington's Pressure on Ankara:** The U.S., committed to supporting the SDF as a partner against Daesh, is likely to escalate diplomatic pressure⁷ on Türkiye to limit SNA operations. Ankara will resist such pressure, arguing that the YPG's continued presence threatens Türkiye's security and regional stability.
- **SDF's Internal Fractures:** The SDF is expected to experience internal fissures, particularly along sectarian lines in urban centers like Raqqa and Deir el-Zour.⁸ Arab communities, historically uneasy with Kurdish dom-

⁶ Agnes Helou, "US announces coalition mission in Iraq to end by 2025, but US 'not withdrawing'", *Breaking Defense*, 27 September 2024, <https://breakingdefense.com/2024/09/us-announces-coalition-mission-in-iraq-to-end-by-2025-but-not-withdrawing/>, (Access Date: 16 December 2024)

⁷ Ragıp Soylu, "US rushes to contain Turkey-backed offensive against SDF in Syria", *Middle East Eye*, 11 December 2024, <https://www.middleeasteye.net/news/us-rushes-contain-turkey-backed-offensive-sdf-syria>, (Access Date: 14 December 2024)

⁸ Walid Al Nofal, "Protests and SDF defections: Discontent simmers in eastern Deir e-Zor", *Syria Direct*, 13 December 2024, <https://syriadirect.org/protests-and-sdf-defections-discontent-simmers-in-eastern-deir-e-zor/>, (Access Date: 16 December 2024)

inance, may defect or resist SDF control, undermining the group's cohesion. This fragmentation could weaken the SDF's operational capacity, providing Türkiye and its SNA allies an opportunity to consolidate gains in the north of Syria. A fractured SDF, combined with increasing U.S. pressure, may prolong instability, but Türkiye will remain a decisive actor in shaping Syria's security landscape.

In conclusion, the developments of 2024 have presented Türkiye with both security challenges and strategic opportunities. By leveraging emerging regional collaborations and navigating the evolving post-Assad landscape, Türkiye has the potential to strengthen its counterterrorism efforts while consolidating its influence in Syria and Iraq.

TÜRKİYE'S DEFENSE: Growing Capabilities within the Global Vision



Rifat Öncel

13

SUMMARY OF 2024

- 1 The Turkish Naval Forces experienced an impressive boost in capabilities this year, receiving several game-changing platforms that have significantly enhanced the operational reach of the navy. Among them are TCG Piri Reis, TCG Istanbul, and TCG Derya.
- 2 The procurement of 4.5th generation fighter aircraft has remained a key issue on Türkiye's defense agenda, particularly regarding the delivery schedule of F-16s and the pending approval from Germany on a potential Eurofighter Typhoon sale.
- 3 Turkish-American defense cooperation saw a notable improvement, particularly following Türkiye's approval of Sweden's NATO application, which paved the way for U.S. Congressional approval of Türkiye's F-16 modernization request.
- 4 Türkiye's defense industry also witnessed progress in its relations with several NATO allies. Many Western NATO members lifted restrictions on defense trade, marking Türkiye's approval of Sweden's NATO accession as a milestone.
- 5 Defense exports maintained impressive momentum, with the Asia-Pacific market emerging as a key destination for Turkish arms. Countries such as Indonesia and Malaysia show willingness to further deepen their defense partnerships with Türkiye.
- 6 Türkiye has intensified its efforts to enhance jeopardized security in the Black Sea. To achieve this, Türkiye enhanced its partnerships with NATO allies Romania and Bulgaria to establish MCM Black Sea – a task group aimed at combating drifting naval mines in the region resulting from the war in Ukraine.

MAIN DYNAMICS

Türkiye's defense policy and defense industrial relations were influenced by several key dynamics throughout 2024 and they will likely continue to play an important role in those sectors next year. Among them are the emergence of naval diplomacy, the Black Sea security, and the country's long-standing defense ties with Europe and the U.S.

Emergence of Turkish Naval Diplomacy

The Turkish navy has increasingly become a formidable force in the region, bolstered by the addition of cutting-edge platforms. The commissioning of the TCG Istanbul frigate and TCG Piri Reis submarine, along with other surface and underwater platforms, including unmanned naval systems such as Marlin and Ulaq unmanned naval vehicles, reflects Türkiye's growing maritime capabilities.¹

Boosted by rapidly growing maritime capabilities and a naval industrial leap-forward, Turkish decisionmakers implemented naval diplomacy in order to increase the visibility and the credence of the country as well as to showcase national defense industrial capabilities. The country's one of the most modern surface combatant TCG Kınaltıda conducted a nearly 5-month journey to the Far East, visiting 23 ports across 19 countries, improving bilateral relations and showcasing Türkiye's indigenous defense capabilities. This development alone was the embodiment of the country's newly emerged naval diplomacy, which will likely become a key component of foreign policy in the next decade.

"The Steel Dome, our domestic and national project, will ensure that our layered air defense systems and all our sensors and weapons work integrated with

¹ Rifat Öncel and Murat Aslan, "TCG Piri Reis'in Hizmete Girişi ve Türk Deniz Kuvvetleri," SETA, August 25, 2024, <https://www.setav.org/odak/tcg-piri-reisin-hizmete-girisi-ve-turk-deniz-kuvvetleri>

each other under a network structure, create a common air picture, deliver it to operation centers in real-time and present it to decision makers with artificial intelligence support.” Haluk Görgün/President of Secretariat of Defense Industries/08.02.2024

Securing Black Sea in the Wake of Ukraine War



The Steel Dome, our domestic and national project, will ensure that our layered air defense systems and all our sensors and weapons work integrated with each other under a network structure, create a common air picture, deliver it to operation centers in real-time and present it to decision makers with artificial intelligence support.

Haluk Görgün/President of Secretariat of Defense Industries/08.02.2024

Although the maritime domain has not been a space for major contest between Russia and Ukraine after initial clashes, the war has still jeopardized Black Sea security for neighboring countries, particularly due to the proliferation of drifting naval mines. Türkiye's traditional policy in the region has been to seek cooperative endeavors with littoral states and NATO allies. In line with this historical pattern, Türkiye, Romania, and Bulgaria established the Black Sea Mine Countermeasures Task Group (MCM Black Sea) in January 2024.² This trilateral initiative addressed the mine threat through joint operations and exercises, often supported by other NATO allies. It also seems to contribute to Turkish-Greek normalization as common drills took place within the mission.

Improvement in Turkish-American Defense Ties

Russian aggression in Ukraine has reinforced NATO cohesion, creating momentum to resolve long-standing defense issues between Türkiye and the United States. The F-16 modernization program symbolizes this progress. Following Türkiye's approval of Sweden's NATO membership, the U.S. State Department officially notified Congress of the arms sale, which paved the way for technical talks and subsequent process.

Given the historical significance of the F-16 in Turkish-American defense cooperation since the 1980s, advancing this deal holds critical importance for maintaining bilateral defense ties as Türkiye was one of the first recipients of

² Serdar Dincel and Umit Turk, "Türkiye, Romania, and Bulgaria establish task force to demine Black Sea," Anadolu Agency, July 1, 2024, <https://www.aa.com.tr/en/europe/turkiye-romania-and-bulgaria-establish-task-force-to-demine-black-sea/3263294>

the aircraft and third in the world to operate the most F-16s over the decades.³ The progress made on the F-16 deal, therefore, recreated long-lost defense synergy between Türkiye and the United States which is likely to also incentivize defense cooperation in other areas.

Türkiye's Role in Evolving European Defense

The war in Ukraine exposed weaknesses in European defense capabilities and industries. Türkiye, with its developing national defense sector, seeks to fill some of these gaps. Notably, defense restrictions imposed by European countries and Canada were lifted following Türkiye's approval of Sweden's NATO accession.

However, deeper Turkish-European defense cooperation remains elusive. Persistent opposition from France, Greece, and the Greek Cypriot Administration – evident in their resistance to Turkish arms aiding Ukraine – highlights enduring intra-European divisions.⁴ Similarly, Europe struggles with addressing its air and missile defense gaps, demonstrated by the Sky Shield controversy, reflecting broader systemic challenges.

2025 EXPECTATIONS

Procurement of 4.5th Generation Fighter Aircraft

Key developments in 2024 suggest significant progress in Türkiye's efforts to procure modern fighter jets. Technical talks with the U.S. have concluded and the first payment for F-16s has been made. Meanwhile, reports indicate that Germany has tentatively approved the sale of Eurofighter Typhoons to Türkiye. These developments indicate that the future composition of the Turkish air force will certainly form with NATO aircraft, while the dominance of the F-16 will continue. Despite years of speculation that Türkiye would procure further sophisticated Russian weaponry such as the Su-34 or Su-57 aircraft, the past years demonstrated that Turkish decisionmakers will prioritize acquiring Western warplanes.

While these procurements are likely to conclude in 2025, delivery timelines – especially for the F-16s – will face delays due to Lockheed Martin's production backlog caused by the aircraft's rapidly increased popularity among countries with lower budgets in the wake of the war in Ukraine.⁵

³ Rifat Öncel, "3 QUESTIONS - Türkiye's F-16 request to US," Anadolu Agency, February 27, 2023, <https://www.aa.com.tr/en/world/3-questions-turkiye-s-f-16-request-to-us/2832640>

⁴ Stavros Ioannidis, "Greece, Cyprus, France block Bayraktar financing," Kathimerini, February 17, 2024, <https://www.ekathimerini.com/news/1231979/greece-cyprus-france-block-bayraktar-financing/>

⁵ Tim Martin, "Lockheed Martin sees 300 potential F-16 export sales 'opportunity'" *Breaking Defense*, July 21, 2024, <https://breakingdefense.com/2024/07/lockheed-martin-sees-300-potential-f-16-export-sales-opportunity/>

Selective Defense Partnerships within the EU

Despite Türkiye's inability to secure a formal role in EU and/or European defense mechanisms, strong bilateral partnerships have emerged with countries like Spain, Italy, and the United Kingdom. The frequency of bilateral political and military visits demonstrates that mutual willingness exists for deepening defense cooperation. Shared political perspectives and mutual interests in security matters are expected to strengthen cooperation in 2025. In this regard, Turkish-Spanish cooperation is likely to increase in naval platforms while Turkish-British defense cooperation is likely to deepen in the air domain.

The re-emergence of Turkish-German defense ties marks another potential development, with discussions underway for Eurofighter sales, air defense systems, and torpedoes.⁶ However, the fall of Chancellor Olaf Scholz's government and political fragmentation in Germany cast uncertainty over this. In the last decade, despite fluctuating relations, Türkiye successfully acquired German armaments like the first Reis Class submarine. Therefore, the structural factors regarding Türkiye-Germany relations such as the historical ties, the large Turkish minority in Germany, the war in Ukraine, and the deal on the irregular migration will likely affect defense relations and have a positive outcome.

The Rise of Turkish Naval Industry and Maritime Power

While Türkiye's massive investment in national defense capabilities is well-known, one recent distinguishable trend is the capacity and capability boost in the country's naval industrial facilities, the gradual but substantial increase in the Turkish navy's power projection instruments, and a remarkable number of naval platform exports, including corvettes, assault bots, and even unmanned naval vehicles. Turkish shipyards are currently building more than 30 ships of various types⁷, including an air defense destroyer and an aircraft carrier, which is a record for the country, and a remarkable program of global standards.

Historically admired for its formidable land forces, this increased capability of the navy would likely have important implications for Turkish defense posture. The most likely outcomes are the strengthening of overseas bases, more

⁶ "Germany resumes major arms exports to Türkiye in policy shift," Army Recognition, October 7, 2024, <https://armyrecognition.com/news/navy-news/2024/germany-resumes-major-arms-exports-to-tuerkiye-in-policy-shift>

⁷ Ragıp Soylu, "Turkey building 31 warships to boost regional dominance and global power," Middle East Eye, January 8, 2025, <https://www.middleeasteye.net/news/turkey-building-31-warships-boost-regional-dominance-and-global-power>

assertive naval diplomacy, as well as the increasing number of naval platform exports. The last decade already has similar Turkish advances in foreign policy and the recent military and energy agreements with Somalia indicate that this willingness is likely to continue.

TABLE 10 TURKISH DEFENSE: KEY ISSUES AND MAIN FACTORS

Issue	Positive	Negative	Ambiguous
Turkish-American defense relations	Cooperation incentivized by the Ukraine war	Greek lobby may delay Congressional processes	Trump's cabinet may undermine potential arms deals despite his personal support
Turkish-EU defense relations	Turkish drones and vehicles attract EU members	France pushes for intra-EU defense trade, restricting outsiders	Scholz government's fall may halt defense synergy between Türkiye and Germany
Turkish navy and naval diplomacy	Major platforms like I-Class frigates and Reis submarines to bolster the navy	Budget pressures could delay or cancel projects	Türkiye's naval modernization may cause unease in the West due to its traditional view of Türkiye as a land power

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SETA SECURITY RADAR

TÜRKİYE'S GEOPOLITICAL LANDSCAPE IN 2025

Edited by Murat Yeşiltaş, Bilgehan Öztürk

The 2025 edition of SETA Security Radar analyzes Türkiye's evolving foreign, security, and defense policies within the context of a shifting geopolitical landscape. Focused on the challenges and opportunities Türkiye faces in 2025, it highlights Ankara's strategic responses to regional conflicts, great power competition, and defense modernization. The report examines Ankara's defense industry advancements, including investments in unmanned systems, air defense technologies, and naval capabilities, underscoring its pursuit of strategic autonomy while maintaining commitments to NATO and fostering partnerships with Africa and Central Asia.

It also evaluates Türkiye's role in addressing post-Assad Syria, mediating conflicts such as Somalia-Ethiopia and Sudan, and navigating tensions in Gaza while positioning itself as a regional stabilizer. Türkiye's counterterrorism efforts, particularly against PKK/YPG threats, and its strategies to balance relations between Russia and NATO are analyzed as key aspects of its security framework.

This edition sheds light on Türkiye's approach to mitigating economic constraints, strengthening defense exports, and leveraging diplomatic influence to shape the regional and global security order in 2025.

