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Romanian Diplomatic Institute



POLICY PAPER

no. 33/2022

EUROPEAN ENERGY SECURITY, THE UKRAINIAN CRISIS, AND TÜRKİYE'S VULNERABILITIES IN 2022

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MINISTERUL AFACERILOR EXTERNE



EUROPEAN ENERGY SECURITY, THE UKRAINIAN CRISIS, AND TÜRKİYE'S VULNERABILITIES IN 2022 ¹ *

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Policy Paper Series no. 33 / 2022

Published by: Romanian Diplomatic Institute

ISSN: 2285-8938

Abstract

The war in Ukraine and the ongoing conflicts in Syria and Iraq threaten European security. Türkiye stands at the very epicentre of this major turmoil, and its geopolitical relevance appears to be rising. If, for instance, the Russian Federation drastically cuts natural gas flows to Europe in the coming months, medium- and long-term alternatives could originate from the Caspian region (Azerbaijan, Turkmenistan, etc.) or the Eastern Mediterranean. While Türkiye remains a key transit country for such options, it is simultaneously facing a severe domestic economic crisis alongside a growing strategic dependence on Moscow. This study examines this complex dynamic from a European perspective, arguing for the careful consideration of specific scenarios, including pessimistic ones.

Keywords: Europe, energy security, Türkiye, Russo-Ukrainian conflict.

¹ This publication draws exclusively on open-source materials. The opinions expressed herein are solely those of the author and do not necessarily reflect those of the institution.

* The present text is the English translation of the article originally published in Romanian in 2022, reflecting the international context and particularities of that period.

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INTRODUCTION

The year 2022 is defined by the Russian military aggression in Ukraine, which could impact Russia's medium- and long-term status as a primary supplier of grain, fertilizers, natural gas, oil, metals, and other essential raw materials to the European common market. Natural gas is the most critical issue, given that the European Union (EU) currently imports over a third of its annual requirements from Russia, creating significant short- and medium-term vulnerabilities.

Major alternative natural gas resources have been discovered over the past decade in the Eastern Mediterranean, marked by an intensification of diplomatic activity surrounding the exploitation of these fields. Both developments highlight the importance of energy security strategies-not only for regional states (including those in the Persian Gulf and Africa), but also for global actors such as the EU, the US, and major energy-consuming Asian nations.

In this intricate context, Türkiye's strategic position, situated geographically at the intersection of these geopolitical processes, *appears* increasingly pivotal. However, the policies of the Erdoğan-AKP regime in Ankara, in power for nearly two decades, have significantly weakened the country economically and, as argued here, strategically, particularly in its relationship with Russia. Compounded by the missteps of an aggressive regional foreign policy, Türkiye has become a deeply vulnerable actor subject to internal and external shocks, carrying a disruptive potential across the region that warrants careful analysis, including from a Romanian standpoint.

This study explores these multifaceted dynamics by outlining its key dimensions from the author's perspective. First, it details the connection between a potential major European energy crisis stemming from Moscow's aggression and ongoing developments in Eastern Mediterranean gas exploitation. It then assesses Türkiye's current position within this context, highlighting the domestic and external vulnerabilities of the Erdoğan-AKP regime. The paper factors in Ankara's multi-layered dependence on Moscow, alongside Türkiye's efforts in recent years to maintain working ties with Russia, Ukraine, and other relevant regional actors.

Rather than focusing strictly on Türkiye's specific tactical moves regarding Russian aggression in Ukraine, the author addresses broader regional dynamics. To that end, the study is structured around three main questions:

1. How do Türkiye's policies intersect with these broader trends, particularly European energy security?
2. What are Türkiye's primary vulnerabilities in the current context? *(These two questions are examined together, as their answers are closely linked.)*
3. In conclusion, what medium and long-term solutions exist, and how can Romania contribute as an EU and NATO member state?

To address these questions, the author draws on open-source data, partially corroborated through exchanges with relevant specialists, but primarily verified against independent sources such as non-governmental publications, policy research groups, and international monitoring organizations. Unverified claims by less experienced analysts or reports lacking credible attribution were excluded from the analytical framework from the outset.

External validity is ensured by a logical text structure focused directly on the core questions. Türkiye's economic situation and foreign policy-shaped by the AKP regime's recent conduct-are treated as a complex set of independent variables explaining the constraints within which the regime operates internally and externally. The primary outcome (the dependent variable explained here) is Türkiye's accelerating dependence on Russia, with potentially critical ramifications for its future, including its relationships with traditional European and North American partners. Under this logic, Türkiye's strategic importance is bound to grow, but increasingly to Moscow's advantage-a premise that serves as the central working hypothesis of this analysis.

The conclusions address how these constraints shape the Ankara regime's domestic and foreign policy choices, as well as how traditional partners might respond without permanently damaging long-term relations with Türkiye beyond the lifespan of the current administration.

EU DEPENDENCE ON RUSSIAN NATURAL GAS AND ALTERNATIVE SOLUTIONS

Over the past two decades, Moscow has repeatedly demonstrated its willingness and readiness to leverage its dominant position in the European energy market-especially regarding

natural gas-to advance geopolitical aims. At the time of finalizing this analysis (initiated in April and completed in August 2022), Russian aggression in Ukraine confirms the validity of this assessment.

While significant variations exist among member states, the EU imports approximately 60% of its overall oil and natural gas needs, along with smaller quantities of coal.³ Russia accounts for nearly 25% of total EU oil imports, while reliance on Russian natural gas was considerably higher-ranging between 43% in 2019 and 48% in 2020, before dropping to around 40% in 2021 due to the COVID-19 pandemic.⁴

In quantitative terms, annual EU gas consumption has averaged roughly 400 billion cubic meters (bcm) in recent years. European gas imports from Russia ranged between 150 and 170 bcm per year, standing at 155 bcm in 2021.⁵ Crucially, however, quantities delivered to Europe represent over 70% of total Russian natural gas exports. This highlights a net structural dependency of the supplier (Russia) on the buyer (the EU) rather than the reverse. Thus, Europe's fundamental issue is not dependency in itself, but Moscow's propensity to weaponize its position as a primary supplier for geopolitical blackmail.

Alternatives exist, but they cannot resolve the Russian problem for European policymakers-namely the European Commission and member state governments-in the immediate term. Long-term solutions within the single market's decarbonization strategy could take two to three decades to yield decisive results. This process requires enhancing domestic and industrial energy efficiency, alongside an accelerated shift toward electrification focused on hydropower, solar, wind, and liquid hydrogen as substitutes for fossil fuels. Ongoing research into thermonuclear fusion technology is equally vital, progressing slowly but steadily. There is hope that such clean, virtually unlimited energy could enter the common market by 2050 – the EU's target year for full decarbonization.⁶

³ European Commission, „State of the Energy Union 2021 – Contributing to the European Green Deal and the Union's recovery”, Bruxelles, 26.10.2021 COM(2021) 950 final,

https://energy.ec.europa.eu/index_en

⁴ European Commission DG Energy, „Quarterly Report on European Gas Markets”, *Market Observatory for Energy*, 13, nr. 4 (2020/2021),

https://ec.europa.eu/energy/sites/default/files/quarterly_report_on_european_gas_markets_q4_2020_final.pdf

⁵ „Natural gas consumption in the European Union from 1998 to 2020”, *Statista*, 26 august 2021

Cathrin Schaer, „Russia-

Ukraine crisis: How Europe may cope if Putin shuts off gas”, *Al Jazeera*, 3 februarie 2022,

„What happens if Russia shuts off gas supplies to Europe?”, *Euronews*, 28 februarie 2022,

⁶ „Cercetarea în fuziunea termonucleară – O opțiune energetică pentru viitorul Europei”, European Commission – Directorate-General for Research, 2005, https://www.euro-fusion.org/fileadmin/user_upload/Archive/wp-content/uploads/2011/11/fusion_research_romanian.pdf[https://www.euro-fusion.org/fileadmin/user_upload/Archive/wp-

In the context of the war in Ukraine, the European Commission proposed – at the insistence of several member states – classifying natural gas and nuclear energy (currently generated through atomic fission) as transition energy sources.⁷ The Commission's proposal gained support from the European Parliament in a July 6, 2022 vote. However, some industry stakeholders are expected to challenge its practical implementation in court, alongside potential pushback from certain member states within the EU Council of Ministers.⁸ Based on existing reserve data and current policies, transition processes will take time; thus, relative reliance on Russian natural gas supplies could remain a geopolitical challenge for the next two to three decades. Russian aggression in Ukraine underscores just how severe this challenge can become over a very short timeframe.

For short-term windows spanning just a few months, available solutions remain limited. A temporary return to coal mining, already implemented in several countries, can only offer a short-term fix due to heavy pollution levels. Increasing natural gas extraction from European fields is another possibility, though major breakthroughs are unlikely, as these sources currently cover only about 10% of annual consumption.⁹ Gas imports from Africa (Algeria and Libya, alongside Angola and others) could be expanded using existing pipelines: Maghreb-Europe, Medgaz, Trans-Mediterranean, or Mellitah-Gela (Greenstream). While capacity expansion potential exists for these pipelines, building extra infrastructure takes time, and the additional volumes would still fall short of fully eliminating Europe's annual reliance on Russian gas.

Regarding the Caspian region, natural gas is transported first to Türkiye via the South Caucasus Pipeline (Baku-Tbilisi-Erzurum, BTE), and onward to Europe via the Trans-Anatolian Pipeline (TANAP). Intensive efforts are underway to expand TANAP's transit

[content/uploads/2011/11/fusion_research_romanian.pdf](#)), European Commission, „Why the EU supports fusion research and innovation”.

⁷ „EU proposes labelling gas and nuclear energy as climate friendly”, *Deutsche Welle*, January 1, 2022, <https://www.dw.com/en/eu-proposes-labeling-gas-and-nuclear-energy-as-climate-friendly/a-60308833>

⁸ Elena Sanchez Nicolas, „Legal action looms after MPs back ‘green’ nuclear and gas”, *EU Observer*, July 6, 2022, <https://euobserver.com/green-economy/155454>

⁹ „Liquefied Natural Gas”, *European Commission*, https://energy.ec.europa.eu/topics/oil-gas-and-coal/liquefied-natural-gas_en

capacity, but it is unlikely to quickly exceed its current maximum throughput of 16 bcm-roughly 10.5 bcm of which reaches Europe, with the remainder consumed by Türkiye.¹⁰

Liquefied natural gas (LNG) imports from non-Russian global suppliers could also be scaled up. Potential sources include the US, Nigeria, Algeria, Trinidad & Tobago, Egypt, Qatar, Peru, Australia, Malaysia, and Indonesia. However, the current number of LNG import terminals across Europe remains insufficient, and building new regasification infrastructure requires significant capital and time. Under existing infrastructure, European LNG imports in 2021 totalled approximately 80 bcm (accounting for 20% of total gas imports that year).¹¹ Consequently, over the medium and long term, European nations must secure additional alternatives to Russia, which should enhance the strategic value of the gas reserves discovered in the Eastern Mediterranean since 2010.

NATURAL GAS RESERVES IN THE EASTERN MEDITERRANEAN AND THE TURKISH ISSUE

Initial surveys conducted in 2010 showed that the Eastern Mediterranean could supply over 2,000 bcm of natural gas. Updated assessments and further discoveries have pushed estimates past 3,500 bcm.¹² Provided the owner states cooperate, these reserves could secure long-term energy self-sufficiency for regional nations, with surpluses exported to Europe to ease reliance on Russia during its green transition. However, transport infrastructure across these distances remains a major hurdle. Compounding this, Türkiye's aggressive regional posture has led key regional players to formulate plans that exclude Ankara.

A "new great game" took shape following those initial 2010 discoveries, drawing interest from global energy majors alongside sovereign states¹³. Against the backdrop of rising illiberalism, Erdogan's administration adopted a more assertive stance-initiating unilateral

¹⁰ „Azerbaijan set to boost gas supply to Europe this year, double capacity in future”, *Reuters*, <https://www.reuters.com/business/energy/azerbaijan-set-boost-gas-supply-europe-this-year-double-capacity-future-2022-02-23/>

¹¹ „Liquefied Natural Gas”, *European Commission*, data publicării indisponibilă, https://energy.ec.europa.eu/topics/oil-gas-and-coal/liquefied-natural-gas_en

¹² Sohbət Karbuz, „Natural gas resources in the eastern Mediterranean: Challenges and opportunities”, *IEMed Mediterranean Yearbook 2012*, p. 214, <https://www.iemed.org/wp-content/uploads/2021/02/Natural-Gas-Resources-in-the-Eastern-Mediterranean-Challenges-and-Opportunities.pdf>; Michael Ratner, „Natural gas discoveries in the eastern Mediterranean”, *Congressional Research Service Report*, p. 1, <https://sgp.fas.org/crs/mideast/R44591.pdf>

¹³ Aylin G.G. Aka, Aslıhan E. Bozoglu, İsbändiyar Hashimov și Afet Pulhan, „The new ‘great game’ in the Eastern Mediterranean”, *Israel Affairs* 28, nr. 1 (2022): 16-27.

exploration in 2012 and disrupting survey efforts by other regional actors, particularly Cyprus and Greece¹⁴.

Under its neo-Ottoman agenda, Ankara asserts control over what nationalist military figures term the *mavi vatan* ("Blue Homeland"), a domain of exclusive Turkish sovereignty spanning the Black, Aegean, and Mediterranean Seas. This aggressive posture targets its neighbours, most notably Cyprus, which has remained divided since 1974. Ideologically, *mavi vatan* feeds on long-standing hostility toward the "Christian West," amplified in recent years through state-aligned media and public-school curricula¹⁵.

This same logic drove Turkish offensive operations in northern Syria, running alongside Ankara's notable tolerance toward certain Islamic State factions in the area. Ankara extended similar support to Muslim Brotherhood movements and affiliated governments in Qatar and Egypt (under the former Morsi administration)¹⁶. Its foreign policy has been marked by double-dealing regarding the war in Ukraine, aggressive political manoeuvring using Crimean Tatars, and obstructionist delays surrounding Sweden and Finland's NATO accession.

This hostility toward Western partners was evident in Türkiye's backing of the pro-Muslim Brotherhood government in Tripoli, culminating in a November 2019 maritime boundary agreement that carved up Eastern Mediterranean Exclusive Economic Zones (EEZs). The treaty effectively cut across the Eastern Mediterranean, blocking East-West infrastructure projects backed by European nations to enhance energy security.

TÜRKIYE'S REGIONAL RIVALS RESPOND AND ALTERNATIVES

Greece and Egypt pushed back in January 2021 by signing a joint EEZ agreement designed specifically to neutralize the Türkiye-Libya pact. This alignment was made possible under President el-Sisi following the July 2013 fall of the Morsi administration. Türkiye was subsequently shut out of the East Mediterranean Gas Forum (EMGF), a regional cooperation framework established as an international body in March 2021.

¹⁴ "Timeline: Turkey's Gas Exploration Off Cyprus Raises Tensions", Reuters, 14 octombrie 2019, <https://www.reuters.com/article/us-cyprus-turkey-ship-timeline-idUSKBN1WT20L>.

¹⁵ Dragoş C. Mateescu, „De ce Turcia lui Erdoğan nu va putea să își refacă relațiile cu aliații săi occidentali”, Veridica, 21 aprilie 2022, <https://www.veridica.ro/editoriale/de-ce-turcia-lui-erdogan-nu-va-putea-sa-isi-refaca-relatiile-cu-aliatii-saioccidentali>

¹⁶ Cengiz Aktar, „Escaping NATO's Turkey Paradox”, The National Interest, 3 august 2022, <https://nationalinterest.org/feature/escaping-nato%E2%80%99s-turkey-paradox-204010>

Supported by the EU, US, and World Bank (all holding observer status), the EMGF prioritized the *Eastmed Pipeline*-a proposed \$7 billion, 1,900 km project connecting Cyprus and Crete to continental Greece to deliver regional gas and hydrogen to European markets. Designated an EU Project of Common Interest (PCI), it secured preliminary technical funding via the *Connecting Europe Facility*. However, high estimated costs and Ankara's continuous interference cast doubt on its final execution¹⁷.

The US decision to withdraw support further undermined the pipeline's prospects. Washington shifted its priority to exporting US LNG to Europe (becoming the world's top LNG supplier by July 2022) while backing electrical interconnectors like the EuroAfrica Interconnector (linking Egypt, Cyprus, and Greece via subsea cables)¹⁸. US Under Secretary of State Victoria Nuland confirmed this policy shift during an April 2022 visit to Athens¹⁹.

The EuroAfrica Interconnector allows regional electricity and hydrogen exports to leverage existing short-range gas pipelines feeding LNG export terminals in Egypt. While African energy infrastructure presents a viable alternative to Russian gas, these cross-continental power grids, gas lines, and LNG logistics demand heavy capital investments and long development timelines²⁰.

These alternative arrangements bypass a Türkiye determined to assert its regional presence through aggressive moves. Yet, Ankara's resistance to the *Eastmed Pipeline* holds strategic weight for both Washington and European capitals for two reasons: 1) Transit routes across Turkish land and sea territory remain cheaper and easier to build than deepwater subsea pipelines; 2) Integrating Türkiye into regional gas networks could reduce its dependence on Moscow.

Both arguments point to the same reality: Türkiye's energy security remains linked to Europe's. Serious questions remain regarding whether Türkiye can navigate its mounting economic, social, and political crises while its leadership continues to make concessions to

¹⁷ Emily Stromquist, „East Med Gas needs clean tech and regional integration to support investment case”, Middle East Institute, 14 septembrie 2021, <https://www.mei.edu/publications/east-med-gas-needs-clean-tech-and-regional-integrationsupport-investment-case>

¹⁸ Statement on East Med Energy Cooperation”, Ambasada Statelor Unite ale Americii în Grecia, 10 ianuarie 2022, <https://gr.usembassy.gov/statement-on-east-med-energy-cooperation>; „U.S. voices misgivings on EastMed gas pipeline - Greek officials”, Reuters, 11 ianuarie 2022, <https://www.reuters.com/business/energy/us-voices-misgivings-eastmed-gaspipeline-greek-officials-2022-01-11/>

¹⁹ Vassilis Nedos, „Nuland: No time or money for pipelines”, Kathimerini, 7 aprilie 2022, <https://www.ekathimerini.com/news/1181644/nuland-no-time-or-money-for-pipelines/>

²⁰ Benjamin Fox, „African states eye EU gas opportunity from Ukraine crisis”, Euractiv, 25 februarie 2022, <https://www.euractiv.com/section/africa/news/african-states-eye-eu-gas-opportunity-from-ukraine-crisis/>

autocratic powers in the East-most notably Russia and China-at the expense of its traditional Western partners.

TÜRKIYE'S VULNERABILITIES AND DEPENDENCE ON RUSSIA

Economic challenges

Ankara's economic strain stems directly from policy choices made under the presidential system instituted in January 2018. Centralized decision-making under President Erdogan stripped the Central Bank of its independence, forcing rate cuts down to 14% by late 2021. This political control was reconfirmed in August 2022 when the Central Bank cut interest rates further to 13%. While central banks globally raised rates to curb inflation, Türkiye followed an unconventional monetary path that views interest rates as the primary driver of inflation.

As economists predicted, consumer inflation topped 61% by March 2022 and neared 80% by late July 2022²¹. Producer price inflation climbed from 115% in March to nearly 145% by late July, putting severe upward pressure on retail prices²². These figures mark the worst economic destabilization since the 1998 crisis that brought down Bulent Ecevit's coalition government and paved the way for the AKP's rise to power. Türkiye now leads emerging markets in inflation rates, with the August rate cut threatening to compound the damage.

The Turkish lira lost 44% of its value against the US dollar in late 2021 and dropped another 25% through the first half of 2022. Costly interventions by the Central Bank only temporarily slowed this decline without restoring long-term market confidence. Domestic transactions have increasingly dollarized, with over 60% of household deposits held in foreign currencies (primarily USD and EUR) by mid-2022.

The US dollar proved to be the most profitable domestic holding in 2021 (yielding 23% real returns), followed by gold (19.7%) and the euro (14.5%), while bank deposits and state bonds lost 22.75% and 32.7% respectively. Though currency devaluation typically boosts

²¹ „Consumer Price Index, July 2022”, *Türkiye Merkez Bankası* [Banca Centrală a Turciei], 3 august 2022, <https://data.tuik.gov.tr/Bulten/Index?p=Consumer-Price-Index-July-2022-45796&dil=2>

²² „Domestic Producer Price Index”, *Türkiye Merkez Bankası* [Banca Centrală a Turciei], 3 august 2022, <https://data.tuik.gov.tr/Bulten/Index?p=Domestic-Producer-Price-Index-July-2022-45856&dil=2>

exports, Türkiye's structural reliance on imported technology, capital, raw materials, and energy negated these gains, pushing many businesses toward bankruptcy²³.

Macroeconomic deficits continue to widen, prompting market warnings regarding potential sovereign default risks. The trade deficit grew by over 240% year-on-year, surpassing \$10 billion in January 2022 alone (roughly 2% of GDP)²⁴. Official figures for early 2022 showed a widening gap, reaching \$21 billion for the first half of the year. By July 2022, the monthly deficit hit \$10.6 billion (compared to \$4.33 billion in July 2021)²⁵. Central Bank updates for mid-2022 reported a current account deficit of \$32.4 billion²⁶.

Credit rating agencies responded by downgrading Turkish sovereign debt deeper into junk territory, placing its economy at the bottom among emerging market peers. Analysts openly warn of hyperinflation risks²⁷. Lower interest rates paired with import reliance mean that nominal growth or export gains will only fuel further currency depreciation and current account deficits. Given the executive branch's interference in monetary policy and resistance to structural reforms, escaping this economic trap under the current administration appears unlikely—a dynamic where Moscow's leverage over Ankara plays an increasingly prominent role.

²³ Mustafa Sonmez, „Turkish inflation hits highest level under Erdoğan's rule”, *Al-Monitor*, 4 ianuarie 2022, <https://www.al-monitor.com/originals/2022/01/turkish-inflation-hits-highest-level-under-erdogan-rule/>; „Finansal Yatırım Araçlarının Reel Getiri Oranları, Ocak 2022”, *Türkiye İstatistik Kurumu*, Buletin 45570, 8 februarie 2022, <https://data.tuik.gov.tr/Bulten/Index?p=Finansal-Yatirim-Araclarinin-Reel-Getiri-Oranlari-Ocak-2022-45570>; „Turkey's main partner for imports was Russia in January, according to TurkStat”, *Bianet*, 28 februarie 2022, <https://bianet.org/english/economy/258385-turkstat-turkey-s-foreign-trade-deficit-has-soared-by-over-234-percent-in-a-year>; „Turkey Inflation Rate”, *Trading Economics*, februarie 2022, <https://tradingeconomics.com/turkey/inflation-cpi>; Mustafa Sonmez, „Turkey's runaway inflation soars to near 79%”, *Al-Monitor*, 4 iulie 2022, <https://www.almonitor.com/originals/2022/07/turkeys-runaway-inflation-soars-near-79>

²⁴ „Ödemeler Dengesi İstatistikleri” [Statisticile bilanțului de plăți], *Türkiye Merkez Bankası* [Banca Centrală a Turciei], ianuarie 2022,

<https://www.tcmb.gov.tr/wps/wcm/connect/TR/TCMB+TR/Main+Menu/Istatistikler/Odemeler+Dengesi+ve+İlgili+Istatistikler/Odemeler+Dengesi+Istatistikleri/>; „Turkey's January trade deficit soars 240%, energy imports jump”, *Reuters*, 2 februarie 2022, <https://www.reuters.com/world/middle-east/turkish-trade-deficit-soars-240-year-on-year-january-ministry-2022-02-02/>

²⁵ Mustafa Sonmez, „Turkey's growing current account gap exacerbates lira weakness”, *Al-Monitor*, 13 iunie 2022, <https://www.al-monitor.com/originals/2022/06/turkeys-growing-current-account-gap-exacerbates-lira-weakness>; „Temmuzayı dış ticaret istatistik tabloları” [Tabele statistice privitoare la comerțul exterior pentru luna iulie], Republica Turcia - Ministerul Comerțului, 3 august 2022, <https://ticaret.gov.tr/istatistikler/bakanlik-istatistikleri/dis-ticaret-istatistikleri/temmuz-ayi-dis-ticaret-istatistik-tabloları>

²⁶ „Balance of payment statistics – June 2022”, *Türkiye Merkez Bankası* [Banca Centrală a Turciei], 3 iulie 2022, <https://www.tcmb.gov.tr/wps/wcm/connect/EN/TCMB+EN/Main+Menu/Statistics/Balance+of+Payments+and+Related+Statistics/Balance+of+Payments+Statistics/>

²⁷ Tom Rees, „A warning from Turkey – this is what hyperinflation looks like”, *The Telegraph*, 6 iulie 2022, <https://www.telegraph.co.uk/business/2022/07/06/warning-turkey-what-hyperinflation-looks-like/>; Aslı Kandemir și Kagan Koc, „Turkish Hyperinflation Already Here for Citigroup, Vodafone”, *Bloomberg*, 4 august 2022, <https://www.bloomberg.com/news/articles/2022-08-04/hyperinflation-is-already-here-for-citigroup-vodafone-in-turkey>

Türkiye's growing dependence on Russia

The degree of dependence is growing rapidly, especially in the agricultural and energy sectors, largely due to the current regime's policies. It has supported the construction sector and certain industries while systematically neglecting *agriculture* since the beginning of the Erdoğan-AKP administration. Türkiye has thus transitioned from an economy capable of feeding its population 15–20 years ago to massive grain imports from Russia (64.6%) and Ukraine (13.4%) in the past year. Sunflower oil imports are added to this (65.5% from Russia and 4.2% from Ukraine). Statistics for the current period will only be finalized toward the end of this year, but the proportion of imports from Russia will likely grow, as this country exploits the occupied Ukrainian territories. Meanwhile, Türkiye's exports to Russia have been halved, and those to Ukraine are now difficult to carry out by sea without Russia's consent. Russia's role remains decisive even after the conclusion, in July 2022, of the Istanbul agreement to secure Ukrainian exports through the Bosphorus and Dardanelles.

Tourism is another sector where Türkiye depends on Russian and Ukrainian visitors. Of the nearly 30 million tourists who visited the country in 2021, bringing in revenue of around 24.5 billion USD, over 4.5 million came from Russia and over 2.5 million from Ukraine²⁸. Domain analysts expect the war to reduce the influx from both countries, especially from Ukraine, but official data will only become available toward the end of 2022.

Regarding *energy*, Türkiye is a country virtually devoid of relevant domestic resources. Oil reserves are insignificant, and the natural gas deposits discovered in the Black Sea are sufficient for only about ten years, all requiring major financial and technological investments regardless. As in the case of Europe, it is not oil, but gas that induces Ankara's strategic vulnerability to Moscow. At a national consumption of just over 48 bcm of natural gas in 2021, imports from Russia covered 33.6%, supplemented by 24% from Azerbaijan, 11.1% from Iran, with the rest of imports coming as LNG mainly from the United States, Russia, Kazakhstan, Greece, Nigeria, Libya, and Algeria²⁹. However, the post-pandemic Turkish economy, with a

²⁸ Hikmet Adal, „Russia-Ukraine war: How will it affect Turkey's economy?“, *Bianet*, 25 februarie 2022, <https://bianet.org/english/economy/258257-russia-ukraine-war-how-will-it-affect-turkey-s-economy>

²⁹ „A Cold Winter: Turkey and the Global Natural Gas Shortage“, *Ekonomi ve Dış Politika Araştırmalar Derneği – EDAM*, 6 octombrie 2021, <https://edam.org.tr/en/a-cold-winter/>; „Turkey's gas imports down, LPG purchases up in November“, *Daily Sabah*, 25 ianuarie 2022, <https://www.dailysabah.com/business/energy/turkeys-gas-imports-down-lpg-purchases-up-in-november>

population larger than 2–3 years ago, will consume more, which has the potential to increase strategic dependence.

At Akkuyu, a local subsidiary of the Russian state company *Rosatom* (*Akkuyu Nükleer Rosatom*) is building Türkiye's first nuclear power plant, with a price tag that has already risen from 20 to 22 billion USD. The first reactor (1,200 MW) out of a total of four is scheduled to become operational on the occasion of the Republic's centenary in 2023. The other three are scheduled for operational inauguration in 2026, when the plant should produce 4,800 MW. This figure represents 10% of Türkiye's current electricity requirement. President Erdoğan announced in November 2021 that two more nuclear power plants would be built with Russian technology and assistance. Given press investigations, never confirmed or denied by authorities, showing that Turkish technicians and authorities *do not* have access to the construction site premises or the operating technology, Türkiye's dependence on Russia could acquire deeper significance in the near future³⁰.

Furthermore, the war in Ukraine adds uncertainty regarding the Akkuyu project. Although *Rosatom* itself is not yet targeted by Western sanctions, they apply to the banks financing the project, Sberbank PJSC and Sovcombank. The completion of the plant is thus threatened by the consequences of sanctions³¹. As in many other similar cases, Türkiye's dependence on Russia, with hidden economic and political costs, could deepen. Some analysts already suggest that the relationship between the two countries on the topic of energy seriously undermines Ankara's capacity to exercise its sovereignty³².

Recent events at the time of finalizing this report (August 2022) confirm this evolution. Thus, *Reuters* announced on July 30, 2022, that *Rosatom* abruptly cancelled the construction contract with the Turkish firm I.C. İçtaş İnşaat, without giving prior notice or official justification. It immediately signed a new contract, entrusting control over all details of this process to *TSM Enerji*, which in Türkiye represents a group of three Russian firms. Just two

³⁰ „Erdoğan announces plans for two more nuclear power plants”, *Ahval*, 9 noiembrie 2021, <https://ahvalnews.com/powerplant/erdogan-announces-plans-two-more-nuclear-power-plants>; „Only Russians allowed in core of nuclear power plant in southern Turkey, says engineer”, *Duvar English*, 1 octombrie 2021, <https://www.duvarenglish.com/only-russians-allowedin-core-of-russian-built-akkyuku-nuclear-power-plant-in-turkey-says-engineer-news-59043>

³¹ Firat Kozok și Selcan Hacaoglu, „War Sanctions Snag Russia's Building of Turkey Nuclear Plant”, *Bloomberg*, 31 martie 2022, https://www.bloomberg.com/news/articles/2022-03-31/war-sanctions-snap-russia-s-building-of-nuclear-plant-inturkey?utm_source=google&utm_medium=bd&cmpId=google; Tony Wesolowsky, „The Rosatom Exemption: How Russia's State-Run Nuclear Giant Has Escaped Sanctions”, *Radio Free Europe/Radio Liberty*, 15 iunie 2022, <https://www.rferl.org/a/rosatom-russia-nuclear-giant-escapes-sanctions/31899192.html>

³² David O'Byrne, „Turkey, Russia gas ties grow contentious amid Ukraine war”, *Al-Monitor*, 28 iulie 2022, <https://www.al-monitor.com/originals/2022/07/turkey-russia-gas-ties-grow-contentious-amid-ukraine-war>

days before this announcement, a transfer of 5 billion USD from Russia to an unspecified entity in Türkiye took place, and two other similar transfers were announced for the following weeks³³.

These developments come *after* Moscow agreed to sign, alongside Kyiv, the UN and Türkiye agreement in Istanbul on July 22 for grain exports controlled from Ukraine via the Black Sea. It is therefore possible that a dangerous trade-off took place, through which Russia may have received, in exchange, total control under a very long-term contract over the nuclear facilities it is building in Türkiye. Alongside Russian gas and oil, the Akkuyu plant will make Ankara dependent on Moscow for well over 50% of its energy needs after all four reactors are completed, somewhere after 2026. And dependence could grow even higher if the other two plants mentioned publicly by Erdoğan in November 2021 are built.

Official statements after the latest meeting of the two presidents (Sochi, August 5, 2022) signal the intention to deepen bilateral cooperation, raising new questions in the capitals of democratic countries³⁴. Although no technical details were provided, the Turkish leader himself announced that five Turkish banks would adopt the Russian payment system *Mir*, designed to evade Western sanctions, deepening cooperation in transport, agriculture, and construction. Furthermore, Ankara agreed to pay in rubles for an (unspecified) portion of gas imported from Russia, as well as the possibility of Russian firms relocating to free trade zones in Türkiye. This country would thus become the main route for Russia's trade with Europe, in an attempt to avoid sanctions³⁵.

At Sochi, no public statements were made regarding another delicate matter: Moscow's "offer," made a few days before the bilateral meeting, for Ankara to accept through an intergovernmental agreement a reduction in taxes for imports of metals and metal products

³³ „Russia transfers billions of dollars to Turkey for \$20B nuclear plant”, *Daily Sabah*, 29 iulie 2022, <https://www.dailysabah.com/business/energy/russia-transfers-billions-of-dollars-to-turkey-for-20b-nuclear-plant>; „Russia's Rosatom signs new construction contract for Turkish nuclear plant”, *Reuters*, 30 iulie 2022, <https://www.reuters.com/business/energy/russias-rosatom-signs-new-construction-contract-turkish-nuclear-plant-2022-07-30/>

³⁴ Alarm mounts in western capitals over Turkey's deepening ties with Russia”, *Financial Times*, 6 august 2022, <https://www.ft.com/content/00badf9e-f0d9-417f-9aec-9ac1c2207835>

³⁵ Catherine Belton și Kareem Fahim, „Russia turns to Turkey, other trading partners to blunt sanctions' impact”, *The Washington Post*, 5 august 2022, <https://www.washingtonpost.com/world/2022/08/05/russia-turkey-war-sanctions-trade/>; „Turkish banks adopting Russian payments system – Erdoğan”, *Ahval*, 6 august 2022, <https://ahvalnews.com/russia/turkishbanks-adopting-russian-payments-system-erdogan#>; Diyar Guldogan, „Ankara working with Moscow for grain shipment from Russian ports: Turkish president”, *Agentia Anatolia*, 6 august 2022, <https://www.aa.com.tr/en/turkiye/ankara-working-with-moscow-for-grain-shipment-from-russian-ports-turkish-president/2655205>; „Russia and Türkiye agree to trade in rubles and dump US dollar”, *Russia Briefing*, 7 august 2022, <https://www.russia-briefing.com/news/russia-and-turkiyeagree-to-trade-in-rubles-and-dump-us-dollar.html/>

from Russia. The "offer" was made through a statement published on August 1, 2022, by *Sputnik Turkish*, belonging to Denis Manturov, Deputy Prime Minister and Minister of Industry and Trade of Russia³⁶.

The issue of the nuclear plant was not prominent in press releases following the Erdoğan-Putin meeting on August 5 either, with only the fact that its execution would not be delayed being specified. The Russian press insists only on the billions of USD transferred by Russia to Türkiye to support the project, now under total Russian control through *TSM Enerji*. However, even the publication closest to the regime in Ankara, *Sabah*, announced in its English edition that the Turkish firm I.C. İçtaş accuses *Rosatom* that, by replacing it with *TSM Enerji*, it aims to "reduce Turkish corporate presence" in the Akkuyu nuclear plant project.³⁷ It is all the more alarming that a British tabloid quotes a prominent Moscow analyst saying that "Putin holds the keys to Erdoğan's success in next year's elections," a perspective also confirmed by a veteran of Turkish journalism³⁸. The only possible conclusion at this point is that Putin's Russia is gaining decisive influence in Erdoğan's Türkiye, with consequences that must be taken into account in all capitals of the democratic world.

Social Effects and the Declining Popularity of the Erdoğan-AKP Regime

In the context of the accelerated growth of this dependence, prices for electricity, diesel, gasoline, and natural gas rose sharply in Türkiye long before the Russian invasion of Ukraine on February 24, 2022. Thus, the Energy Market Regulatory Authority in Türkiye announced as early as January 1, 2022, the decision to raise electricity prices by 125% for industrial consumers and 50% for household consumers. Natural gas prices were also increased by 50% in industry and 25% for households, with price hikes also announced for petroleum products, vehicle insurance, and certain bridge tolls³⁹. A new price hike came on April 1, when state company BOTAŞ announced natural gas price increases of 50% for industrial consumers, 35%

³⁶ „Russia will ask Turkey to reduce import duties on its metal products”, *Duvar English*, 1 august 2022, <https://www.duvarenglish.com/russia-will-ask-turkey-to-reduce-import-duties-on-its-metal-products-news-61088>

³⁷ „Turkey seeks to resolve row over Russian-built \$20B nuclear plant”, *Daily Sabah*, 3 august 2022, <https://www.dailysabah.com/business/economy/turkey-seeks-to-resolve-row-over-russian-built-20b-nuclear-plant>

³⁸ Aurora Bosotti, „'Keys in Putin's hands' Erdogan warned failure to help Russia to lead to ousting next year”, *Express*, 8 august 2022, <https://www.express.co.uk/news/world/1651876/Erdogan-warning-Russia-Ukraine-invasion-Turkey-election-2023-vn>; Murat Yetkin, „The Sochi Meeting: Putin and Erdoğan's joined destiny”, *Yetkin Report*, 8 august 2022, <https://yetkinreport.com/en/2022/08/08/the-sochi-meeting-putin-and-erdogans-joined-destiny/>

³⁹ „Turkey enters new year with massive hike in gas and electricity prices”, *Duvar English*, 1 ianuarie 2022, https://www.duvarenglish.com/turkey-enters-new-year-with-massive-hike-in-gas-and-electricity-prices-news-60039?fbclid=IwAR0als-ckIBWYs2kXeg_ZxD-dXx0nxhNd-28Y663qmxJoaJneMqWHTH_-2E

for households, and 44.3% for gas used in electricity production⁴⁰. Assumptions regarding Vladimir Putin's role in these price hikes cannot be confirmed.

All these came against the backdrop of galloping inflation, detailed above, and against other negative developments already present in the economy. Thus, the construction sector, a true engine of economic growth in previous years, reached a crisis situation. The same situation applies to other branches of manufacturing industry, mainly due to rising raw material costs, logistics services, energy, and key tax increases. The decline in agriculture adds another burden, with the overall situation now aggravated by the Ukrainian crisis.⁴¹ Bankruptcies are expected by the end of this year, as signs of collapse in essential economic and administrative sectors are already apparent and systemic recovery measures are slow to emerge. The current regime, caught in its own trap of authoritarianism, cannot accept structural reforms that would require deep democratic reforms. It is therefore no surprise that public support for the current government is diminishing.

Polls conducted by *Metropoll*, one of the few credible polling companies in Türkiye, clearly show the declining popularity of President Erdoğan, his regime, and—very importantly—the presidential system of governance established in January 2018. Thus, in population choices, the opposition alliance around the Republican People's Party (Turkish acronym CHP) was supported in March 2022 by approx. 40% of respondents, placing it above the conservative-nationalist alliance (AKP-MHP) in power led by President Erdoğan (approx. 39%). If the choices of supporters of two other smaller parties not yet officially part of the coalition around CHP are added, the opposition percentage rises above 45%. To this camp's tally must also be added the over 12% of the pro-Kurdish party HDP. Although HDP is threatened with outlawing through a legal procedure, the majority of its voters will never opt for the continuation of the current administration⁴². Another credible operator in the field of sociological analysis,

⁴⁰ 2022 Yılı Nisan Ayı Doğal Gaz Toptan Satış Fiyat Tarifesi” (Tarifurile de vânzare engros a gazelor naturale pentru luna aprilie 2022), *Botaş*, 31 martie 2022, [https://www.botas.gov.tr/Sayfa/2022-yili-nisan-ayi-dogal-gaz-toptan-satis-
fiyattarifesi/637](https://www.botas.gov.tr/Sayfa/2022-yili-nisan-ayi-dogal-gaz-toptan-satis-fiyattarifesi/637)

⁴¹ Mustafa Sonmez, „Turkey’s crisis-hit construction sector threatens big fallout”, *Al-Monitor*, 31 octombrie 2018, <https://www.al-monitor.com/originals/2018/10/turkey-construction-sector-threatens-big-fallout.html>; „Rising cost of raw materials, logistics, and heavy taxes hit Turkish industry hard”, *Duvar English*, 7 iunie 2021, [https://www.duvarenglish.com/rising-cost-of-raw-materials-logistics-and-heavy-taxes-hit-turkish-industry-hard-news-
57741](https://www.duvarenglish.com/rising-cost-of-raw-materials-logistics-and-heavy-taxes-hit-turkish-industry-hard-news-57741); Mustafa Sonmez, „Turkey’s middle class put on austerity footing amid skyrocketing prices”, *Al-Monitor*, 12 ianuarie 2022, [https://www.al-monitor.com/originals/2022/01/turkeys-middle-class-put-austerity-footing-amidskyrocketing-
prices](https://www.al-monitor.com/originals/2022/01/turkeys-middle-class-put-austerity-footing-amidskyrocketing-prices); „Ukraine crisis pushes Turkish builders, exporters into turmoil”, *Daily Sabah*, 25 februarie 2022, <https://www.dailysabah.com/business/economy/ukraine-crisis-pushes-turkish-builders-exporters-into-turmoil>

⁴² „Poll: Turkey’s opposition alliance leads Erdoğan’s People’s Alliance”, *Bianet*, 1 martie 2022, <https://bianet.org/english/politics/258435-poll-turkey-s-opposition-alliance-leads-erdogan-s-people-s-alliance>

KONDA, produced a study in May 2022 showing a widening gap over the last two months in favor of the opposition (46.4%) compared to the ruling coalition (36.2%).⁴³

According to rules in force, presidential, parliamentary, and local elections should take place simultaneously no later than June 2023. It will be a year with high symbolic and political significance, as the centenary of the Republic will be celebrated on October 29. And if he wins the presidential election, President Erdoğan would continue to control this Republic. The current constitution grants him almost unlimited authority within the presidential system of governance, regardless of the situation in parliament (tr. *Meclis*) in Ankara. But the President also bears full responsibility for the fate of governance, and internal and external policy errors are attributed to him by the population, among whom his popularity has decreased in turn.⁴⁴

In January, although on an upward trend after taking measures to temporarily stabilize the lira, the performance of the current President was positively rated by just under 41% of respondents in a *Metropoll* survey. Even supporters of the current regime believed then that the opposition would manage the economy better.⁴⁵ Given that Erdoğan has so far defeated his rivals in all electoral competitions, some analysts prefer to remain cautious, avoiding unfavorable predictions for the current head of state. But a more recent sociological survey by *Metropoll* from June 2022, confirmed by another in July, shows that he would have already lost even the majority needed to win the presidential election in a second round of voting.⁴⁶

BETWEEN A ROCK AND A HARD PLACE, TÜRKİYE MAINTAINS ITS HOSTILE LINE TOWARD THE WEST

In the current context, marked domestically by deteriorating economic performance and the declining popularity of the regime and its leader, the government's rapprochement forces officials to find solutions to break the impasse. Although there will never be official statements

⁴³ „Poll: Turkey's ruling alliance losing against opposition”, *Bianet*, 2 iunie 2022, Poll: Turkey's ruling alliance losing against opposition

⁴⁴ Dragoș C. Mateescu, „A dispărut un stat: noua Turcie și provocările viitorului”, *Hotnews*, 12 august 2018, <https://www.hotnews.ro/stiri-opinii-22641086-analiza-disp-rut-stat-noua-turcie-provoc-rile-viitorului.htm>

⁴⁵ „Erdoğan's approval ratings up as lira stabilises – poll”, *Reuters*, 20 ianuarie 2022, <https://www.reuters.com/markets/currencies/erdogans-approval-ratings-up-lira-stabilises-poll-2022-01-20/>; „Even ruling alliance supporters believe economy is mismanaged, poll shows”, *Duvar English*, 17 februarie 2022, <https://www.duvarenglish.com/even-ruling-alliance-supporters-believe-economy-is-mismanaged-poll-shows-news-60404/>; „69 percent of Turks hold gov't responsible for electricity price hikes”, *Duvar English*, 2 martie 2022, <https://www.duvarenglish.com/69-percent-of-turks-hold-govt-responsible-for-electricity-price-hikes-news-60504>

⁴⁶ Erdoğan would lack majority support in presidential election – poll”, *Ahval*, 8 iulie 2022, <https://ahvalnews.com/turkeyelections/erdogan-would-lack-majority-support-presidential-election-poll/>; „Erdoğan's approval rating drops to 41.5 pct as Turkey grapples with inflation”, *Ahval*, 28 iulie 2022, <https://ahvalnews.com/recep-tayyip-erdogan/erdogans-approvalrating-drops-415-pct-turkey-grapples-inflation>

to this effect, they seem to acknowledge that aggressive foreign policy has contributed to Türkiye's isolation, with a serious impact on foreign trade and the economy in general. The regime in Ankara has made efforts to persuade Türkiye's traditional partners in the West and the Middle East to accept the restoration of relations. However, partners impose conditions, with significant political costs, and credible signs of Ankara giving up its stance of aggressiveness have yet to appear.

Among the most important diplomatic activities in the second half of 2021 and in 2022 so far, worth mentioning are the meetings of Turkish Foreign Minister Çavuşoğlu with his Armenian counterpart Mirzoyan, visits made to Türkiye (to Ankara or Istanbul) by the Greek Prime Minister and the Prime Minister of the Netherlands, the German Chancellor (Angela Merkel, then Olaf Scholz), or the NATO Secretary General. To these are added the meetings of President Erdoğan and Turkish Foreign Minister Mevlüt Çavuşoğlu with the President of France and the British Prime Minister at NATO's emergency council. Erdoğan and Çavuşoğlu are also making efforts to promote Ankara's role as a mediator for a potential peace between Russia and Ukraine, with the same formal objective: regaining Türkiye's traditional posture within the Euro-Atlantic alliance. President Erdoğan's initial opposition to Sweden and Finland's accession to NATO was withdrawn at the NATO summit in Madrid at the end of June 2022. An important role in this case was played by the US President, as well as the diplomatic performance of the NATO Secretary General, together with the Swedish and Finnish foreign ministers.

In connection with this same objective of regional reintegration, Erdoğan and his team have worked intensely to repair relations with partners in the Middle East after years of tension largely due to Turkish aggressiveness. Mention must thus be made of high-level bilateral contacts and visits in relations with Israel, the United Arab Emirates (UAE), and Saudi Arabia, moving in the same direction in the relationship with Egypt. The frequency of reciprocal visits at the level of heads of state, governments, and diplomats suggests a felt need in Ankara to reach rapid adjustments (*sense of urgency*), as internal economic and financial crisis pressures intensify.

But the results are rather fragile because the Erdoğan-AKP regime still does not meet the conditions explicitly or implicitly demanded by its partners. The Turkish President has declared on repeated occasions that his country must be included in any gas exploitation project in Eastern Mediterranean deposits and that a pipeline between Israel and Türkiye would be the

optimal solution for Europe's energy security. Such an option is viable from a technical and economic standpoint, but the meeting between Erdoğan and Israeli President Isaac Herzog in March 2022 did not lead to the conclusion of a punctual agreement. Diplomatic and media sources insist that the bilateral relationship can advance in that direction only if Türkiye gives up its support for Hamas and its aggressive policy in the region, especially in relations with Cyprus and Greece.⁴⁷ It was no coincidence that President Herzog arrived in Ankara after visits to Nicosia and Athens, the same path later followed by the heir to the Saudi crown, Prince Mohammed bin Salman. And the *de facto* ruler of Saudi Arabia also included Cairo in his diplomatic itinerary.

Turkish policy toward Northern Cyprus represents one of the key regional aspects to watch. Remarkable is the unprecedented support Ankara extends to the current government of the Turkish entity in the north of the island. Also to be emphasized are Erdoğan's repeated interferences in Lefkoşa/Nicosia politics, through which the rise of the prime minister and now president Ersin Tatar was favoured in 2019. He responds by supporting a two-state solution on the island, in line with Ankara's position and against international peacekeeping efforts under UN auspices.⁴⁸

In the tense political atmosphere on the island, against the backdrop of Türkiye's growing aggressiveness in the Eastern Mediterranean and the Aegean Sea, it would not be at all surprising if the discourse on the "unification" of Northern Cyprus with Türkiye, very popular in 2003-2004, returned to the public agenda in both countries. The internal economic crisis facing the Erdoğan-AKP regime and the approach of the 2023 elections could make this subject a saving solution for the regime, alongside the hypothesis of a permanent Turkish presence in northern Syria and Iraq.

Ankara's inclusion in Eastern Mediterranean cooperation schemes is explicitly conditioned by Egypt, Saudi Arabia, and the UAE on giving up support for the Muslim Brotherhood and governments that are offshoots of the Brotherhood. Press reports indicate,

⁴⁷ Itamar Eichner, „Israel to Turkey: Relations only in exchange for shuttering Hamas' activities in Istanbul”, Ynet News, 18 ianuarie 2022, <https://www.ynetnews.com/article/Sy5FCkQ100>; „Turkey says Erdogan and Israel's Herzog will discuss ways to improve ties”, Reuters, 5 martie 2022, <https://www.reuters.com/world/middle-east/turkey-says-erdogan-israelsherzog-will-discuss-ways-improve-ties-2022-03-05/>; Rina Bassist, „Israel's president exchanges friendly gestures in Turkey”, Al-Monitor, 9 martie 2022, <https://www.al-monitor.com/originals/2022/03/israels-president-exchanges-friendlygestures-turkey>

⁴⁸ Engin Yüksel, „Turkey's interventions in its near abroad: The case of northern Cyprus”, CRU Policy Brief, mai 2022, Clingendael Netherlands Institute of International Relations, https://www.clingendael.org/sites/default/files/2022-05/Policy_brief_Turkeys_interventions_Northern_Cyprus.pdf; Esra Aygin, „Turkey's interference in north more blatant than ever”, Cyprus Mail, 8 mai 2022, <https://cyprus-mail.com/2022/05/08/turkeys-interference-in-north-more-blatant-thanever/>

however, that although Turkish secret services give some evidence of cooperation with other secret services in the region (Israeli, Syrian, etc.), Türkiye's support for Hamas and the Muslim Brotherhood actually continues through long-term commitments.⁴⁹ Thus, the perception persists that the Erdoğan-AKP regime gives no concrete signs that it would satisfy the conditions of partners wishing to improve relations. Consequently, with the exception of some investments from the aforementioned countries, especially the UAE, and some currency swap agreements worth tens of billions of USD that do not bring significant benefits,⁵⁰ Türkiye remains for now outside major regional cooperation schemes. The recent announcement regarding the re-establishment of diplomatic relations between Türkiye and Israel at the ambassadorial level brings hope for improving bilateral relations, but not yet Ankara's reintegration into the regional schemes mentioned here.

On the contrary, the Ankara regime's low credibility has led influential actors to take advantage of a tragic event on July 20, 2022, to highlight its vulnerability. An artillery strike, which Baghdad authorities insist was fired from a Turkish base in northern Iraq, caused the deaths of nine civilians, including women and children, in a recreation resort in Zakho province, in the territory of the Kurdistan Autonomous Region. Around thirty-three people were reported severely injured. The Ankara government denied responsibility, suggesting the perpetrators were Kurdish terrorists from northern Iraq without naming the PKK and without providing evidence. Diplomatic protests coming from Baghdad, Erbil, Tehran, the Arab League, Washington, Berlin, and other directions show that: (1) information from the scene holds the Turks responsible, and (2) all these actors are increasingly irritated by the presence of Turkish military forces in northern Iraq and Syria. Explicit demands were made, including through documents submitted to the UN Security Council, for Ankara to respect Iraq's sovereignty and territorial integrity and withdraw its military forces from the region. Baghdad also requested an international investigation in this case.⁵¹

⁴⁹ „Turkey has not expelled members of Hamas – Turkish official”, Ahval, 11 mai 2022, <https://ahvalnews.com/israel-turkey/turkey-has-notexpelled- members-hamas-turkish-official>; Abdullah Bozkurt, „Turkey's Erdoğan not ready to give up on Muslim Brotherhood”, Nordic Monitor, 30 mai 2022, <https://nordicmonitor.com/2022/05/turkeys-erdogan-not-ready-to-give-up-on-muslim-brotherhood/>; Nadav Shragai, „Turkey is having a hard time overcoming its Hamas habit”, Israel Hayom, 26 iulie 2022, <https://www.israelhayom.com/2022/07/26/turkeyis- having-a-hard-time-overcoming-its-hamas-habit/>

⁵⁰ Mustafa Sonmez, „How realistic are Ankara's hopes for trading in Turkish liras?”, *Al-Monitor*, 23 iulie 2022, <https://www.al-monitor.com/originals/2022/07/how-realistic-are-ankaras-hopes-trading-turkish-liras>

⁵¹ Amberin Zaman, „Massacre of nine Iraqi tourists blamed on Turkey sparks protests, diplomatic fallout”, *Al-Monitor*, 21 iulie 2022, <https://www.al-monitor.com/originals/2022/07/massacre-nine-iraqi-tourists-blamed-turkey-sparks-protestsdipomatic- fallout>; „Arab League, US, Germany condemn Zakho attack”, *Bianet*, 22 iulie 2022, <https://bianet.org/english/militarism/264844-arab-league-us-germany-condemn-zakho-attack>; „Iraq submits complaint to UN against Turkey after Zakho attack”, *The Arab Weekly*, 24 iulie 2022, <https://the arabweekly.com/iraq-submits-complaintun->

Türkiye's relations with Western partners are also at an unprecedented low. US sanctions for the acquisition of Russian S-400 systems remain in force. Türkiye is excluded from the F-35 program and other cooperation programs with the United States and other Western partners, including regarding the purchase of assemblies and subassemblies for submarines, tanks, and other military technology categories.⁵² At the time this paper was finalized (August 2022), the US Congress had not yet approved Türkiye's purchase of F-16 aircraft and modernization kits for those already in Ankara's arsenal. The same Congress adopted in mid-July 2022 a proposal by some members that these aircraft could be sold to Türkiye only on condition that they not be used against a NATO ally (Greece).⁵³

Equally significant is the fact that since his inauguration as President, Joe Biden has met his Turkish counterpart in person only three times and never at the White House. US Undersecretary of State Victoria Nuland's visit to Ankara on April 4, 2022, marked the official announcement of the establishment of a "strategic mechanism" where "all issues" could be discussed, as well as a subsequent meeting of the heads of diplomacy of the two countries. However, the issues remain the same and unresolved: bilateral trade, human rights, judicial independence, and regional disputes in Syria, Iraq, the Eastern Mediterranean, and Libya.⁵⁴

A crucial detail in this context is the persistence of a stable majority in the US Congress holding a critical and negative attitude toward the Erdoğan-AKP regime, which accentuates Ankara's helplessness and irritation. In July 2022, responses marked by declarative hostility from Ankara toward US, Cypriot, and Greek interests were recorded, with Greece becoming an increasingly important partner for Washington in the region. Thus, after the tripartite meeting (Russia-Türkiye-Iran) in Tehran on July 19, President Erdoğan made a statement of unprecedented harshness, calling on the US to "immediately" withdraw its troops from northern Syria, east of the Euphrates.⁵⁵ Just six days later, the Turkish minister of energy and natural resources announced that Türkiye's newest drillship, *Abdülhamid Han*, was set to leave Mersin

against-turkey-after-zakho-attack; „UNSC discusses Zakho attack: No one wishes further escalation”, Bianet, 27 iulie 2022, <https://bianet.org/english/world/265047-unscc-discusses-zakho-attack-no-one-wishes-further-escalation>

⁵² Fehim Taştekin, „Will Ukraine crisis help Turkey dodge Western arms embargoes?”, *Al-Monitor*, 28 martie 2022, <https://www.al-monitor.com/originals/2022/03/will-ukraine-crisis-help-turkey-dodge-western-armsembargoes#ixzz7Otyebbjq>

⁵³ Patricia Zengerle, „U.S. House backs measure that would restrict sale of F-16s to Turkey”, *Reuters*, 14 iulie 2022, <https://www.reuters.com/world/us/us-house-backs-measure-that-would-restrict-sale-f-16s-turkey-2022-07-14/>

⁵⁴ Nazlan Ertan, „Turkey, US launch new strategic mechanism amid Ukraine crisis”, *Al-Monitor*, 6 aprilie 2022, <https://www.al-monitor.com/originals/2022/04/turkey-us-launch-new-strategic-mechanism-amid-ukraine-crisis>

⁵⁵ „US forces must leave areas of Syria east of Euphrates River: Turkish president”, *Agenția Anatolia*, 20 iulie 2022, <https://www.aa.com.tr/en/turkiye/us-forces-must-leave-areas-of-syria-east-of-euphrates-river-turkish-president/2641610>

port on August 9 for hydrocarbon reserve evaluation off the coast of the Eastern Mediterranean.⁵⁶ Both statements undermine regional relation normalization efforts supported by the US and the EU. Hostile statements by Turkish leaders toward Greece, Turkish fighter jet overflights above Greek islands, and certain strategic objectives, including in Alexandroupolis, have fuelled regional instability, undermining Ankara's position in this context.

Another episode that could lead to a major crisis situation concerns the political process by which Sweden and Finland wish to become NATO members. After initial opposition explicitly expressed by President Erdoğan, he yielded surprisingly quickly for less experienced observers. Beyond what is perceived as a diplomatic success for the NATO Secretary General, phone calls between Biden and Erdoğan right before the Madrid summit (June 28, 2022) appear to have been decisive. Equally important was the US President's agreement to a meeting with his Turkish counterpart during that summit. The event, heavily publicized in Türkiye, was used by Erdoğan to present himself to domestic public opinion as having obtained concessions on equal footing with Biden. In reality, he obtained only the commitment via memorandum from Sweden and Finland that they "would not support" organizations declared by Türkiye as "terrorist," and the US President's declarative support for the purchase of F-16 aircraft. The second issue depends on US Congressional approval as indicated above, which imposed the condition that US military tech and knowledge sold to Türkiye not be used against a NATO ally. Türkiye's support remains uncertain, however. The leader in Ankara takes every opportunity to remind NATO partners through aggressive press statements that Sweden and Finland are not complying with Türkiye's strict imperatives regarding what this state defines, extremely vaguely, as terrorists.

Relations with the European Union (EU) are also at an all-time low. No one in Brussels or Strasbourg talks about Türkiye's European integration anymore. After more than ten years of sliding toward authoritarianism, the EU Council on June 26, 2018, concluded emphatically that this country has moved away from the Union and its values, effectively freezing the

⁵⁶ „Abdülhamid Han drillship to start mission in Med in 2 weeks”, *Daily Sabah*, 26 iulie 2022, <https://www.dailysabah.com/business/energy/abdulhamid-han-drillship-to-start-mission-in-med-in-2-weeks>.

opening of new accession chapters and the modernization of the Customs Union between the two parties.⁵⁷

Türkiye is now close to expulsion from the Council of Europe (CoE) after repeatedly refusing to implement final rulings of the European Court of Human Rights in several cases. The most well-known are those of Osman Kavala and Selahattin Demirtaş, but there are many others. These involve human rights and minority activists, among whom are dozens of politicians, some former members of the Parliament in Ankara, all currently in Turkish prisons without having received trials according to national and international rule of law standards.⁵⁸ Türkiye's potential expulsion from the CoE would undermine its European perspective and international status indefinitely, with political and economic consequences hard to calculate. Adding many other similar cases, such as Türkiye's withdrawal from the Istanbul Convention (CoE, 2011) on preventing and combating violence against women and domestic violence, results in the image of a regime determined to sever more and more bridges with the values and norms upon which peaceful international relations are built in today's world.

Türkiye's relations with the West are currently affected by Ankara's duplicitous positioning in the context of Vladimir Putin's war against the Ukrainian people. Although supporting Ukraine's defence, for example, through the delivery of drones capable of inflicting heavy losses on Russian invaders-and supporting the agreement allowing Ukraine maritime exports, critics believe Türkiye is not actually committed to NATO's collective effort, but merely profiting financially. Supporting this idea are a series of details, including Ankara's systematic refusal to align with Western sanctions against Russia, repeated refusals to give up S-400 systems, or maintaining logistical and banking opportunities for Russian oligarchs to evade sanctions.⁵⁹ As detailed above, the Putin-Erdoğan meeting in Sochi (August 5, 2022) further deepened Russian-Turkish cooperation in the same direction and Ankara's dependence on Moscow.

⁵⁷ „Turkey – European Union Relations”, Republic of Turkey Ministry of Foreign Affairs - Directorate for EU Affairs, 19 iulie 2019, https://www.ab.gov.tr/turkey-eu-relations_4_en.html

⁵⁸ Nazlan Ertan, „Europe's top court reprimands Turkey for jailing philanthropist”, *Al-Monitor*, 11 iulie 2022, <https://www.al-monitor.com/originals/2022/07/europes-top-court-reprimands-turkey-jailing-philanthropist>

⁵⁹ Jared Malsin, „Superyachts, Seaside Apartments and Suitcases Full of Cash: Russians Pour Money Into Turkey”, *The Wall Street Journal*, 7 aprilie 2022, <https://www.wsj.com/articles/superyachts-seaside-apartments-and-suitcases-full-of-cash-russians-pour-money-into-turkey-11649323803>; Giacomo Tognini, „The next haven for Russian oligarchs feeling sanctions”, *Forbes*, 3 mai 2022, <https://www.forbes.com/sites/giacomotognini/2022/05/03/why-turkey-could-become-the-next-haven-for-russian-oligarchs-fleeing-sanctions/?sh=1b6423581678>

Against the backdrop of this rapidly growing dependence, Erdoğan and his team seem to have increasing difficulty finding and adopting solutions, especially if they somehow affect Moscow's interests in areas like Syria or, more recently, Ukraine. Thus, Ankara now officially supports calls for negotiations in the Ukraine conflict, contrary to the policy of other NATO member states but in harmony with similar calls from Hungary and other pro-Russian entities.⁶⁰ Added to this is Türkiye's continued involvement against Western interests (EU, NATO) in the conflicts in Libya and Syria, tensions in the Aegean and Eastern Mediterranean Seas, as well as its contribution to the proliferation of drone armaments to regimes threatening the stability and security of regions and populations, such as Ethiopia, Morocco, or Pakistan, among others.⁶¹

CONCLUSIONS

The present analysis started from three main questions. Due to the organic connection between them, the first two were indicated separately for reasons of analytical logic, but were addressed together in the text. *The first two questions* were as follows: (1) How does Türkiye's policy connect with the developments addressed here and, in particular, with issues related to European energy security?; (2) What are Türkiye's main vulnerabilities in the current context? The answers are, inevitably, complex, with independent variables being extremely volatile. However, the factors involved and the processes they determine link together predictably. Thus, Putin's war against the Ukrainian people leads to a reduction in the flow of natural gas from Russia to Europe. But, as emphasized above, Russia's dependence on the European consumer remains important, and Moscow, although now selling more gas to major clients in Asia, will not find it easy to give up monthly payments of billions of euros from the European market.

In this context, an important long-term issue for Russia is undoubtedly the EU's policy of reducing fossil fuel use through the development of "green" energy resources. Natural gas and nuclear energy (via fission)-temporarily even coal-will continue to represent viable solutions during the transition period until the targets of the European Green Deal are reached.

⁶⁰ Merve Aydogan, „Now it is time to focus on Ukraine cease-fire, says top Turkish diplomat”, *Agencia Anatolia*, 28 iulie 2022, <https://www.aa.com.tr/en/turkiye/now-its-time-to-focus-on-ukraine-cease-fire-says-top-turkish-diplomat/2647854>

⁶¹ Umar Farooq, „The drone problem: How the US has struggled to curb Turkey, a key exporter of armed drones”, *ProPublica*, 12 iulie 2022, <https://www.propublica.org/article/bayraktar-tb2-drone-turkey-exports>

One could even say Putin would not have needed a war in Ukraine to keep Russia as the primary supplier for the European energy market for at least two, perhaps even three decades.

In this context, Türkiye can facilitate important alternative solutions for Europe by increasing the flow from the Caspian Sea and by facilitating the exploitation and export of natural gas reserves in the Eastern Mediterranean basin. However, against the backdrop of an internal economic crisis caused in large part by its own policies, the regime in Ankara has been sliding for several years toward anti-Western religious nationalism, paired with regional aggressiveness unprecedented in the nearly century-old history of the republic. Through this aggressiveness, Erdoğan's Türkiye has "succeeded" only in drastically reducing its options and even its own capital of trust in the region. Just as in Russia's case, aggressiveness brings strategic disservices that are difficult to calculate even for the aggressor.

Ankara's insistence on the unsustainable policy of treating Kurds as enemies of Türkiye and Kurdish militias in northern Syria as terrorist factions contributes to maintaining insecurity throughout the region. Under this logic, Ankara's threats regarding a new attack in the Tell Rifaat-Manbij region should also be judged, despite explicit or implicit opposition from all involved actors and the fact that it could not be clearly proven that local Kurdish forces represent a direct threat to Türkiye's security.⁶²

The artillery strike from a Turkish base in northern Iraq, which killed nine civilians at a resort in the Kurdistan Autonomous Region on July 20, 2022, seriously undermines Ankara's reconciliation efforts with powerful Arab states. Protests from the Arab League, along with those from Baghdad, Tehran, and Washington, also led to a harsh official protest from the UN Security Council.⁶³ All these reactions indicate an international erosion of support for Türkiye's policy, which for more than four decades has treated the Kurdish issue strictly as a security problem. This is how the Pentagon's July 2022 statement should be interpreted, which called for resolving disputes between Ankara and the Kurds through political dialogue rather than military operations.⁶⁴

⁶² Dragoș C. Mateescu, „Amenințarea unei noi ofensive turcești în nordul Siriei – o perspectivă de la Mardin”, *Veridica*, 28 iunie 2022, <https://www.veridica.ro/editoriale/amenintarea-unei-noi-ofensive-turcesti-in-nordul-siriei-o-perspectiva-de-lamardin>

⁶³ „Security Council Press Statement on Attack in Dohuk Province of Iraq”, *UN Security Council*, Press Release SC/14980, 25 iulie 2022, <https://press.un.org/en/2022/sc14980.doc.htm>

⁶⁴ Jared Szuba, „Pentagon warns Turkey against renewed invasion of Syria”, *Al-Monitor*, 15 iulie 2022, <https://www.almonitor.com/originals/2022/07/pentagon-warns-turkey-against-renewed-invasion-syria>

The Erdoğan-AKP regime's policy toward Hamas and the Muslim Brotherhood continues to make Türkiye vulnerable, recording no success in normalizing relations with neighbours and showing no signs of willingness to make significant concessions in the near future. An accentuation of anti-Western, religious-nationalist aggressiveness is to be expected with the approach of the parliamentary, presidential, and local elections in June 2023, which carry existential value for the regime. Under these conditions, Türkiye will continue to represent an obstacle to projects exploiting resources in the Eastern Mediterranean, in which it will most likely not be included by other regional partners. Aggressiveness could continue in this context toward Greece in the Aegean Sea, following the same logic of appealing to religious nationalism in the absence of solutions to resolve the internal economic crisis, which will continue to deepen. The relationship with Europe, particularly with the EU, will remain transactional, likely allowing only the development of the TANAP route for natural gas solely as a result of pressure via Azerbaijan. It must be noted in this context that the regime in Baku exerts significant influence over the one in Ankara, and not the other way around.

From this perspective, the answer to the third main question addressed in this study must be approached: *What are the medium and long-term solutions, and how can Romania contribute as a member state of the EU and NATO?* In the short term, the conflict in Ukraine already affects European energy and food security, as well as that of other regions globally. The sense of crisis should, however, be treated with greater caution; it must not be forgotten that the Russian supplier is forced to sell and distribute natural gas, oil, grain, and other resources to survive. Alternatives to the Russian source exist, some mentioned in this material—even if they will not suffice in the event of a severe short-term crisis-making them more predictable than the current reality. The Istanbul Agreement allowing Ukrainian sea exports through the Bosphorus and Dardanelles is crucial here. It remains to be seen how permissive Russia will continue to be through its delegation in the international control mechanism at the straits, but Russia's own need to export products makes it cooperative.

However, Türkiye's underlying condition as a state remains thorny. The internal situation and the aggressive foreign policy of its leaders make this country an actual or potential problem for regional cooperation projects. Until the June 2023 elections, the logic of Ankara's internal and external policy cannot change radically. Even after the elections, major changes cannot be expected because President Erdoğan and his allies can use constitutional provisions

added in 2017 to maintain authoritarian control over governance, even if the opposition achieves significant electoral gains.

Under these conditions, *European and Romanian policy toward Türkiye* will need to follow the current path, but with a significant shift in emphasis and tone. It must not be forgotten that Ankara has changed the transactional nature of its relationship with Brussels in recent years, managing to impose its own terms instead of EU conditionality (the Copenhagen criteria). As for any commitment by Türkiye toward European integration, that cannot be discussed for more than a decade. The 2023 elections could not bring major changes in this regard either, because within opposition ranks, there are no political forces explicitly campaigning for reforms aligned with European and universal values. The political scene in Türkiye has long been dominated by a single legitimacy discourse: conservative religious nationalism (the ruling regime) or secular/social nationalism (the opposition), both carrying deep anti-Western notes. Being a "legitimacy discourse," it logically addresses a majority public dominated by deeply nationalist and anti-Western views, cultivated for generations by a Turkish educational system that has undergone an even more pronounced radicalization in the past decade.⁶⁵

Under these conditions, Western (including Romanian) attempts to **decisively** influence Ankara's current policy have relatively few chances of success. An indirect approach would be preferable-via partners with considerable influence over the current regime in Ankara, such as Azerbaijan, possibly Pakistan, or even China in certain contexts. Commendable from this perspective is the effort of Romanian diplomacy, including through the embassy in Baku, to find solutions with Azerbaijani partners regarding political and technical challenges related to increasing natural gas deliveries from the Caspian Sea to Europe. These efforts could be complemented by others aimed at encouraging dialogue between Türkiye, Greece, and Israel. Better communication among these three actors, to which European diplomats (including Romanians) can contribute, could facilitate de-escalating the situation in the Aegean Sea and Eastern Mediterranean.

Such an effort could become urgent because developments in Ukraine and the Middle East, including regarding Russian-Turkish relations in these contexts, can lead to dangerous

⁶⁵ Vezi, de exemplu, Hay E.C. Yanarocak, „The Erdoğan revolution in the Turkish curriculum textbooks”, Ramat Gan, IMPACT-se and Henry Jackson Society, 2021, <https://www.impact-se.org/wp-content/uploads/The-Erdogan-Revolution-in-the-Turkish-CurriculumTextbooks.pdf>

situations. The Putin-Erdoğan meeting in Sochi on August 5, 2022, clearly showed that the two authoritarian leaders can lean on one another against what both perceive as threats from the West. If the two authoritarian regimes reach a critical level of panic under external and especially internal pressure, there is a probability that they will deepen their collaboration even further to destabilize the Black Sea region and Eastern Mediterranean. This comes as annexation of Northern Cyprus is openly discussed in Ankara, where Ersin Tatar's government is supported by Türkiye and accepts any project commanded from there.

The possibility of Türkiye recognizing Moscow's territorial conquests in eastern Ukraine (though not Crimea) in exchange for Moscow's recognition of Northern Cyprus's independence-and later even its annexation by Türkiye-should not be ruled out under such conditions. Reciprocal recognitions would attract similar acts from other entities on the international stage. The result, besides fulfilling at least part of the Russian plan in Ukraine, would be an expansion of Türkiye's sphere of influence – a strategic weight difficult for other Eastern Mediterranean states and global actors (such as the US, UK, or EU) to accept. The consequences could be catastrophic. Russia might accept such a development if Putin maintains and multiplies current levers of control over Türkiye, as is already happening. Therefore, maintaining Turkish-Greek-Israeli dialogue is beneficial not only for the peaceful utilization of Eastern Mediterranean resources in the near future, but also for avoiding a potential catastrophe with global reverberations.

All of this depends, however, on the perception of realities in Ankara. In an ideal scenario, Erdoğan could be convinced that the current logic of governance must be adjusted to enable the normalization of the internal economic and political situation in connection with Türkiye's regional posture. Otherwise, the aggressiveness dominating almost every action of the Erdoğan-AKP regime today will continue to make this country vulnerable and undermine it, with consequences that may exceed the imagination of even the most pessimistic experienced analysts. The continuation of current aggressiveness will force even the most prudent partners to choose between being with or against Türkiye. Current developments, unfortunately, seem to be headed precisely in that direction.



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RDI Policy Paper Series
ISSN 2285-8938
ISSN-L 2285-8938

Editing, layout, and graphics: Claudiu Codreanu

Cover photo: <https://unsplash.com/photos/photo-of-truss-towers-yETqkLnhsUI>

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