

A Sea of Opportunities: Exploring cooperation between Turkey and the West in the Black Sea



The Danube spills into the Black Sea (The Sea WiFS Project/NASA Earth Observatory/Wikimedia Commons).



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Atlantic Council
1030 15th Street NW, 12th Floor
Washington, DC 20005

For more information, please visit
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ISBN: 978-1-61977-354-7

October 2024

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OCTOBER 2024

Atlantic Council Turkey Programs

CATS Centre for Applied
Turkey Studies
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Acknowledgment

This report is part of a joint project of the Atlantic Council in Turkey and the Centre for Applied Turkey Studies (CATS). The Centre for Applied Turkey Studies (CATS) at the Stiftung Wissenschaft und Politik (SWP) in Berlin is funded by Stiftung Mercator and the Federal Foreign Office. CATS is the curator of the CATS Network, an international network of think tanks and research institutions working on Turkey. “A Sea of Opportunities: Can the West Benefit from Turkey’s Autonomous Foreign Policy in the Black Sea?” is a project of CATS Network.

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Executive summary

Yevgeniya Gaber

This report aims to explore the prospects for enhanced cooperation between Turkey and Western countries in the Black Sea region in the new geopolitical setting following Russia's full-scale invasion of Ukraine. It emphasizes Turkey's key role in the region as NATO's second-largest military power and the gatekeeper of the Black Sea, and identifies opportunities for the West to engage with Ankara to strengthen regional security and cooperation. Drawing on expert interviews and desk research, the study suggests that—by focusing on defense, maritime security, energy, and political dialogue—the West can leverage Turkey's strategic position to enhance stability and security in the Black Sea region.

In the political sphere, the interests of Turkey and the West in the Black Sea largely overlap. These include pursuing stability and restoring the regional security order; containing Russian revisionism; bolstering the resilience of Ukraine, Moldova, and Georgia and supporting their European and Euro-Atlantic integration; strengthening NATO's defense and deterrence capabilities; and exploiting the region's energy, transportation, and connectivity potential. However, the Black Sea cannot be isolated from the broader context of Turkey's relations with the West, and achieving better synergy in the Black Sea would require considerable efforts to deconflict Turkey-West relations on tracks that extend far beyond the Black Sea itself.

In the maritime domain, Turkey, with the longest coastline and significant naval and air assets, remains a key player in addressing maritime security challenges. While Ukrainian strikes have significantly degraded Russia's ability to sustain its maritime power in the Black Sea, both Ukraine and NATO will need to work more closely with Turkey to maintain this favorable balance of maritime power. The recently launched Mine Countermeasures Black Sea Task Group (MCM Black Sea), which relies on NATO littoral states (Bulgaria, Romania, and Turkey) for force generation, can be seen as a milestone for maritime security in the region. This initiative can potentially serve as a reincarnation of Ankara's idea of regional ownership and provide opportunities for broader cooperation with the West. For example, while Ankara strictly adheres to the Montreux Convention¹ to prevent expanded presence of extra-regional powers in the region, US and UK air control over the western Black Sea reinforces Turkish posture in the region, ensuring that those countries will remain important non-littoral actors in Black Sea security for the foreseeable future.

Ankara also possesses unique assets for stabilizing the region through its growing defense industry. Turkish advances in unmanned systems have become an important offset to Russian defense technological advantages—which helps Ukraine, Turkey, Azerbaijan, and other Russian neighbors to deter or blunt Russian military adventures—and provides support from the sea. A major naval buildup in recent years, led by indigenously produced ships and systems, has put the Turkish navy on a more equal footing with Russia's Black Sea fleet. Supporting defense industrial complementarity between Turkey and other NATO members, as well as between

Ukraine and Turkey, would help deter Russia, strengthen NATO’s European defense pillar, and contribute to a positive dialogue between Ankara, Washington, and Brussels.

Turkey’s strategic position in the region reinforces its role as a critical energy conduit between east and west, providing a unique opportunity to develop energy cooperation that could have a significant impact on energy security and economic interdependence across Europe. As Turkey and the European Union (EU) are developing a deeply interconnected partnership, centered around natural gas and renewable energy sources, harnessing Turkey’s energy potential would be key to achieving a resilient and diversified energy future for the region. While the EU continues its efforts to diversify away from Russian gas, Turkey plays a crucial role in transporting Azerbaijani piped gas through the Trans-Anatolian Natural Gas Pipeline (TANAP) and the Trans-Adriatic Pipeline (TAP), as well as supplying liquefied natural gas (LNG) through its LNG facilities. The development of Turkey’s largest field—Sakarya in the Black Sea, which has huge potential to supply natural gas to Eastern and Central Europe—would further contribute to regional energy diversification and security.

Now that both Turkey and the EU are seeking greater strategic autonomy in today’s complex geopolitical environment, viewing Turkey as a vehicle for advancing Western interests in the Black Sea region would be both misguided and precarious. Instead, recognizing divergences where necessary—and promoting complementary, better-aligned policies where possible—would enable Turkey and the West to achieve results together that neither could accomplish alone.

Yevgeniya Gaber is a nonresident senior fellow at the Atlantic Council IN TURKEY and professor of national security studies at the George C. Marshall European Center for Security Studies. She specializes in European and Black Sea security, with a particular focus on Ukraine, Turkey, and Russia. Previously, Gaber worked as a foreign policy advisor to the prime minister of Ukraine in 2021 and deputy director of the Diplomatic Academy at the Ministry of Foreign Affairs of Ukraine from 2018 to 2020. Previously, Gaber worked as a foreign policy advisor to the prime minister of Ukraine in 2021, deputy director of the Diplomatic Academy at the Ministry of Foreign Affairs of Ukraine from 2018 to 2020, and a diplomat in the Ukrainian embassy in Ankara from 2014 to 2018.

Introduction

Yevgeniya Gaber

This report draws on the findings of a research project titled “A sea of opportunities: Can the West benefit from Turkey’s autonomous foreign policy in the Black Sea?”², a joint initiative of the Atlantic Council in Turkey and the Centre for Applied Turkey Studies (CATS). Through a series of interviews with experts and policymakers, as well as desktop research, the authors explore opportunities for enhanced cooperation between Turkey, European countries, and the United States in the new security environment that has emerged in the Black Sea region following Russia’s full-scale invasion of Ukraine in 2022. In this report, the Black Sea region refers to the six littoral states and the South Caucasus (i.e., Armenia, Azerbaijan, and Georgia).

As the second-largest military power in NATO and the gatekeeper of the Black Sea, Turkey plays a critical role in European stability and security. Since the first days of Russia’s all-out war in Ukraine, the Turkish government has kept the Straits of Bosphorus and Dardanelles closed to Russian warships, expanded defense and military cooperation with Kyiv, and later engaged in active diplomacy, including facilitating the Black Sea Grain Initiative and prisoner swaps. Turkey has remained steadfast in its political support for Ukraine’s sovereignty and territorial integrity, and has consistently refused to recognize Russia’s illegal occupation and annexation of Ukrainian territories. Ankara has also developed close cooperation with the two other NATO members located along the Black Sea—Romania and Bulgaria—and has been vocal in its support for Ukraine’s and Georgia’s NATO membership bids.

On the other hand, Ankara has not joined Western sanctions against Russia, has opposed NATO’s enhanced naval presence in the Black Sea, and has continued cooperation with Russia on a range of issues, most notably energy projects and bilateral trade. At the same time, Turkey’s own security sensitivities and threat perceptions, which differ significantly from those of other NATO allies, have over time cemented Ankara’s traditional “regional ownership” approach, which focuses on Turkey’s own national interests in the region and limits opportunities for cooperation with other extra-regional actors in the Black Sea region.³

While the end state of Russia’s war in Ukraine is difficult to predict, there is no doubt that Turkey will remain a key actor in the postwar regional security environment. This study not only examines both Turkey’s Black Sea policy priorities and the potential role of Western countries in that region, but also explores the possibilities for closer cooperation between Turkey and its Western allies in this new security setting.

Notably, Turkey views strict adherence to the Montreux Convention as a cornerstone of its regional policy and even of its state sovereignty. Yet there are still many areas of overlapping interests that could allow for enhanced cooperation with the West without violating Turkey’s traditional principle of regional ownership. In line with NATO policy, Turkey’s strategic objectives in the Black Sea include deterring, without openly challenging, Russia’s military and naval presence; ensuring that Ukraine

does not fail and that its southern regions are not fully occupied by Russia, which would turn the Black Sea into a “Russian lake”; and strengthening Ankara’s defense industry, naval capabilities, and diplomatic clout in the region.

Turkey sees Ukraine as a natural ally as both countries seek to counter Russian superiority in the Black Sea. Despite maintaining strong economic ties with Moscow, Ankara attaches strategic importance to its relationship with Kyiv, which it regards as a counterweight to Russia, a key element in Ankara’s delicate balancing act with the West and Russia, and an important partner in defense production. Backed by Western allies, this emerging strategic connection could become a backbone of the future security architecture in the region and also strengthen Turkey’s ties with the West.

Now that Ukraine has humbled Russia’s navy in the Black Sea, Turkey’s maritime capacity there stands out all the more. Ankara is using this moment to develop closer defense cooperation with Ukraine, the United States, and other NATO allies. Elements of that cooperation can be seen in progress on the F-16 deal, Sweden and Finland joining NATO, and cooperation between Washington and Ankara on military production.

Positive dynamics in the broader context of Turkey’s dialogue with the United States and European partners have created momentum for exploring new cooperation opportunities in the Black Sea. While the region remains sensitive to fluctuations in Ankara’s relations with its Western partners, these developments also create a window of opportunity for improving relations, and could emerge as a much-needed success story in the transatlantic partnership. Turkey is also seen as an increasingly important actor in the European energy market, both as a transit country and as a potential new supplier of hydrocarbons with the potential to contribute to Europe’s energy resilience.

Recognizing the importance of closer cooperation between Turkey, Ukraine, and Western partners for both regional security and Turkey’s own democratic future, this report provides an in-depth analysis of key areas of common interest in the Black Sea region: deepening political and diplomatic dialogue; strengthening defense and military cooperation; ensuring freedom of navigation and maritime security; and promoting energy diversification.

Part 1.

Political and diplomatic dialogue: Challenges and opportunities for Turkey's realignment with the West in the post-2022 environment

Maryna Vorotnyuk

The rise of the strategic weight of the Black Sea

Experts widely agree that the Black Sea region has remained a blind spot for the West since the Cold War. Despite NATO and the European Union and individual states declaring “interests” in the area, no attempts to formulate a strategic vision for the Black Sea have been made until recently. Sporadic discussions about the region’s neglect surfaced following Russia’s military campaigns in 2008 (against Georgia) and 2014 (in Ukraine), but the spotlight truly trained on the region after Russia’s 2022 invasion of Ukraine and its increased military activity in the Black Sea. The urgent push to develop a strategy to strengthen the West’s presence in the region now is a positive development. For instance, the Black Sea Security Act, passed as part of the US 2024 National Defense Authorization Act authorized the development of a formal US strategy with regard to the Black Sea region. The West’s presence in the area is upheld by three NATO states (Turkey, Bulgaria, and Romania), NATO partners Ukraine and Georgia, EU members Romania and Bulgaria, and three EU candidate states (Ukraine, Moldova, and Georgia). Despite the Black Sea’s geopolitical importance, it was often viewed as on the periphery, based on Russia’s historical perception of the region as its strategic backyard. Today, it has gained prominence as a critical area for Western interests. The outcomes of the Russia-Ukraine war and the resulting new security framework in the Black Sea are seen as pivotal elements in the broader European and global architecture. Turkey’s role, significant in its own right, has been heightened by the increasing importance of the Black Sea to the broader West. As the most militarily capable NATO member in the region and a longstanding architect of regional security, Turkey’s pivotal role in managing escalation is acknowledged by its partners. With centuries of experience in dealings with Russia, a strong rapport with Russian decision-makers in the modern period, and participation in collective efforts to contain Russia at the same time, Turkey is recognized as uniquely positioned to address the resurgence of Russian influence. While doubts persist regarding its autonomy vis-à-vis Russia, Turkey’s contributions in the Black Sea region have proven invaluable to Western partners on numerous occasions. Turkey’s mediating

potential and position on NATO's eastern flank are noteworthy. Amid strained Turkey-West relations, Ankara's pursuit of strategic autonomy has sometimes clashed with the perspectives and policies of its Western allies. Although Turkey's approach has posed challenges to the Alliance's cohesion when it appears to contradict common positions, Ankara's special position is widely acknowledged. Engaging Turkey as a mere conduit for Western interests in the Black Sea region would likely be a futile endeavor. Nevertheless, Turkey possesses unmatched experience and influence in Europe's eastern neighborhood. With better-aligned policies, Turkey and the West could synergize their shared interests, and bring about results unlikely to be accomplished by either party alone.

Turkey as a Black Sea power

Acknowledging Turkey's potential for playing a greater stabilizing role in the Black Sea should not overshadow the reality that Turkey itself lacks a clearly defined strategy for the Black Sea. Turkey's lack of a clear stand-alone Black Sea regional conception is widely understood.⁴ Unlike many states that articulate their objectives and assessments through public strategic documents, Turkey does not have a formal codified vision for its foreign policy strategy, particularly regarding the Black Sea. Turkey's primary perceived sources of insecurity historically lie beyond the Black Sea region, particularly in the Eastern Mediterranean and the Middle East. Consequently, its focus on these areas has overshadowed the development of a distinct Black Sea strategy. The government's prioritization of terrorism as the primary security threat is logical, as Turkish armed forces are engaged in operations aimed at combating this threat across theaters such as Syria and Iraq. The only genuinely and publicly problematic relationship Turkey has in the Black Sea region is with Armenia. Its relationship with Russia is considered as a potential source of tension, but a manageable one. Central to Ankara's stance in the Black Sea has been the delicate balancing act between Russia and the West, a principle likely to endure. Turkey has perceived a greater Western presence in the region as unwarranted. For instance, when Russia annexed Crimea, the West's relatively muted response resonated with Turkey's preference to avoid direct confrontation with Russia.⁵ Turkey's Black Sea policy has been likened to a "chimera," representing a multifaceted paradigm composed of disparate elements and diverse policy directions.⁶ Indeed, Ankara's foreign policy in the Black Sea region appears fragmented, reflecting a multilayered system of interests and a combination of approaches toward Russia, the South Caucasus subregion, Ukraine, and both NATO and the EU. Moreover, Turkey's Black Sea vision is notably centered around Russia. Since 2022, the situation has evolved, prompting Turkey to reassess security threats emanating from the Black Sea, which has transformed into an active battlefield that poses a more tangible threat to Turkey. The region is heavily mined and commercial navigation is partially obstructed, adversely affecting all littoral states. The foundations of the regional order that Turkey had sought to nurture have crumbled. Multilateral institutions, the principle of regional ownership, unimpeded trade flows, and the stability and peace guaranteed by the Montreux Convention are jeopardized.

In this environment, Western partners are placing more pressure on Turkey to change its flexible balancing posture and instead align more closely with its NATO allies. This alignment entails supporting the Alliance's efforts to bolster its defense and deterrence posture against Russia on the eastern flank.⁷ A crisis in relations between Russia and the West has been described as an opportunity for Turkey to reestablish its Euro-Atlantic orientation and to reassert its central security role in the Alliance after years of estrangement.⁸

There is scant evidence, however, to suggest that Turkey is undergoing a strategic shift away from its traditional posture. Balancing continues to be Turkey's preferred approach, with its approach to Russia's war against Ukraine seen by Turkish policymakers as a means to reaffirm its pivotal role—in line with its aspirations as a middle power with global ambitions.

Shared interests in the Black Sea

For decades, Turkey and its Western partners have collaborated on issues of common interest: e.g., the pursuit of stability in the Black Sea region, countering Russian revisionism, bolstering the resilience of post-Soviet states and supporting their European and Euro-Atlantic integration, and leveraging the region's potential in terms of energy, transportation, and connectivity. The collaboration has been marked by varying approaches and difficulties, notably concerning the involvement of external, non-regional powers in regional affairs. In recent years, mutual distrust and substantial estrangement have defined Turkey-West relations. The **overall alignment** of foreign policy priorities is notably **limited**: there is, for example, considerable divergence between Turkey's foreign policy and the EU's common foreign and security policy (CFSP), as indicated by a notably low alignment rate, averaging only 10 percent, according to the European Commission.⁹

The Black Sea cannot be isolated from the broader context of the generally problematic relationship between Turkey and the West. To overcome the deep-seated distrust of Ankara and facilitate aligning and coordinating its actions with its partners would require considerable efforts and deconflicting of Turkey-West relations, sometimes on tracks that have nothing to do with the Black Sea itself.¹⁰

Beyond existing tensions, there is a fundamental challenge in identifying areas of shared interest in the Black Sea region specifically. The Black Sea has not been a priority for many countries, including the United States, leading to a lack of specific Black Sea strategies or codified visions.¹¹ Differing perceptions among individual states on how to address the Black Sea, particularly in response to a resurgent Russia, further complicate efforts to coordinate joint Turkey-West actions.

It is worth noting that Turkey also shares some profound interests in the Black Sea with Russia. Even amid Moscow's war against Ukraine, Turkey and Russia have strengthened their strategic partnership, collaborating on coordinated actions in the Black Sea. Turkey's narrative of emphasizing regional ownership of the Black Sea and questioning the need for a larger NATO role, particularly from the United States,

aligns closely with Russia’s vision. Long-term shared interests such as energy and trade contribute to this alignment—and the West often cannot offer Turkey the same incentives that Russia can.¹² Moscow, for instance, is prepared to provide immediate security benefits and economic relief, as demonstrated by its decision to defer payments for natural gas ahead of the 2023 Turkish general elections. Conversely, there also is recognition that Turkey’s relationship with the West, of which it is an integral part, remains indispensable to Ankara, making a genuine shift toward Russia unlikely.

There are several areas of shared interests for Turkey and the West, as outlined below.

Pursuing stability and restoration of the regional security order

Restoring the regional security order in the Black Sea, which is not Russia-dictated and shaped by its coercion, seems to be a common denominator for both Turkish and Western visions for the Black Sea. This implies restoring the territorial integrity of Ukraine, Georgia, and Moldova, bolstering their resilience through solid democratic anchoring and future EU membership, and supporting eventual NATO membership for Ukraine and Georgia.

At the same time, Turkey’s view of stability in the Black Sea is connected to nonescalation strategy. Turkey perceives itself as a “central country,” – a state with a key geostrategic position – and simultaneously a frontline or outpost state. Given Turkey’s complex geography and its proximity to turbulence across the Middle East, Mediterranean, Balkans, Black Sea, and South Caucasus, it has developed a strong frontier state mentality and identity, which dictates caution in exercising foreign policy.

This focus on nonescalation can be seen in some of Turkey’s recent actions. It calls for the Alliance’s deterrence and defense posture to be “feasible, affordable, and sustainable,” and tailored to the region’s specificities, including the Russian military buildup. (For more on maritime security and defense cooperation, see parts 2 and 3.) According to Turkey’s interpretation, NATO’s presence in the region should prioritize measures to avoid provocations. For example, Turkey blocked the creation of a “Black Sea flotilla” by littoral allies, arguing that it would have remained vulnerable to Russian anti-access/area denial (A2/AD) capabilities, thus exacerbating tensions.¹³

Despite Turkey’s reluctance to allow greater Western involvement in the region and to openly confront Russia, it is not risk averse. Its actions in the shared neighborhood of the South Caucasus, and efforts to balance its relations with Russia through deeper cooperation with Ukraine before and during the war indicate that Turkey perceives Russian revisionism as a threat to the very stability that Ankara attempts to preserve at all costs. While Turkey may not openly acknowledge this threat in the same way as other allied nations do, its desire to maintain equilibrium in the Black Sea and keep Russia in check is an important factor that aligns it closely with the Western vision.

Adhering to the Montreux Convention as a balancing instrument

Turkey's crucial role as the gatekeeper to the Black Sea is generally in line with Western interests. Ankara, renowned for its fervent commitment to the convention, holds the power to control the transit of warships from belligerent and nonlittoral states during times of war. Turkey recognizes its unique position in the Black Sea, a role that has been acknowledged and esteemed by its Western allies. The Montreux Convention is generally perceived as serving the interests of all signatories and the international community, and any attempt to undermine it, per Turkish experts, would be tantamount to shaking a pillar of the international order.¹⁴ In February 2022, Turkey invoked the Montreux Convention, applying it to both Ukrainian and Russian warships, as well as nonlittoral states. Closing of the straits for Russian warships was hailed by Ukraine and Turkey's Western allies as a positive step in aiding Ukraine's war effort. Despite the absence of external NATO powers' warships in the Black Sea, there is a recognition that the Montreux Convention helps maintain a delicate balance in the region, and that this equilibrium in the Black Sea is to Ukraine's advantage. (For more on the military implications of the convention, see part 2.) Clarity about future application of the Montreux Convention should be a common interest for Turkey and its Western counterparts, as this will define the naval component of NATO's defense and deterrence posture.

Strengthening Turkey's regional leadership Leveraging Turkey's convening power and its experience in dealing with the multifaceted Black Sea region could be significant for Turkey-West cooperation. Turkey's status as a regional leader is clear-cut. While the Black Sea may not be a primary strategic priority for Turkey, it perceives itself as a natural regional leader due to its central location. Since the dissolution of the USSR, Turkey has advocated for strong multilateral cooperation in the Black Sea: In 1992, it spearheaded the creation of the Black Sea Economic Cooperation Organization (BSEC). In 2001, Turkey championed the creation of security-related formats including the Black Sea Naval Co-operation Task Group (BlackSeaFor), and in 2004, the Black Sea Harmony initiative, adding to an early emphasis on multilateral cooperation in economic sphere.¹⁵ Turkey also has been actively involved for decades in the South Caucasus and Central Asia, regions that Russia considers to be part of its sphere of privileged influence. This competition remains a dynamic and potentially conflictual aspect of the Turkish-Russian relationship. Whenever Russia has openly undermined the regional balance and resorted to force, Turkey appeared to have accepted Moscow's actions as a *fait accompli* and did not openly confront Russia. However, Turkey continues to harbor ambitions of maintaining its position as a regional leader, and aims to counterbalance Russian revisionism. There have been indications that with Russia heavily engaged in Ukraine for an indefinite period, depleting its resources, and redeploying some of its troops from other conflicts (such as Georgia's occupied regions and Syria) to support its war effort in Ukraine, Turkey seeks to enhance its presence in their shared neighborhood.¹⁶ In the South Caucasus, Turkey supports Azerbaijan and seeks a more even distribution of influence in the region. With Russia presumably losing its preponderant position in the South Caucasus, both because

of the war in Ukraine and the inflation of its security guarantees to Armenia, Turkey may explore arising leadership opportunities.¹⁷ The efforts to normalize relations with Armenia and advocacy for a six-state regional cooperation platform (bringing together the three South Caucasus states plus Russia, Turkey and Iran) are evidence of Turkey's ambition to play a leadership role in the region. Acknowledging Turkey's role in subtly challenging Russia in what the latter perceives as its geopolitical backyard, and understanding how to incentivize Turkey to engage through all available levers with regional states (particularly in the South Caucasus), is of crucial importance to the West. Supporting Turkey's interest in normalizing relations with Armenia, facilitating a peace agreement between Armenia and Azerbaijan, and promoting stability in the South Caucasus through connectivity projects could serve as a platform for aligning Turkish and Western interests.

Containing Russia, supporting Ukraine

A common thread in Turkey-Western relations is the shared goal of containing Russia and supporting Ukraine. However, significant disparities exist in the scope and character of actions taken, as well as in the narratives that explain the policies pursued.

Many analysts have characterized Turkey's actions as a "balancing act," a term frequently employed to encapsulate Turkey's stance. There is a growing consensus, however, that this term requires more nuance. It could be argued that Turkey's policy does not entail maintaining equidistance between the two conflicting parties. Instead, there is a discernible pro-Ukrainian leaning, along with an official acknowledgment of the imperative to uphold Ukraine's territorial integrity as a fundamental precondition for enduring stability in the region. The "geopolitical DNA" of Turkey's relations with Russia and Ukraine exhibit fundamental structural differences.¹⁸ Turkey has sought to maintain an approach of being pro-Kyiv, without being overtly anti-Moscow.¹⁹ Ukraine has emerged as a strategic partner for Turkey in curbing Russia's expansionism in the Black Sea region. Turkey's relations with Ukraine are aimed at salvaging what remains of the shattered equilibrium in the Black Sea, and halting or at least containing Russian revisionist ambitions. By supporting Ukraine, Turkey strives to build a scenario where Russia "bleeds out in Ukraine," giving space for Turkey's unhindered regional ambitions.²⁰ Turkey's position is to prevent both Russia's full defeat and victory.

Ukraine and Turkey have burgeoning defense industry relations. In the face of sanctions from its allies due to Turkey's Syria operation or purchase of the Russian S-400 system, Turkey has intensified its cooperation with Ukraine, which has emerged as an alternative supplier of critical technologies and equipment.

Turkey has not recognized Russia's illegal annexation of Crimea, and has protested against the human rights violations on the peninsula. Ankara has joined the Crimea Platform, which Kyiv launched as an "international consultation and coordination format" to deoccupy Crimea.²¹ After Russia's reinvasion in 2022, Turkey applied the Montreux Convention, preventing Russia from reinforcing its navy in the Black Sea, which has been a significant support to Ukraine's battlefield efforts. But Turkey has not

been willing to pay the economic costs of challenging Russia more robustly through implementing Western sanctions or closing its airspace. Since 2014, when sanctions were introduced after Russia's initial aggression against Ukraine, Turkey has remained critical of them as an instrument of foreign policy. Ankara is the only NATO member to abstain from introducing sanctions. After the February 2022 reinvasion, Turkey's position did not change. Turkey's transactional and compartmentalized relations with Russia have flourished in recent decades. Both states maintain a competitive stance regarding their shared neighborhood, despite their cooperative engagements. As a result, the bilateral relationship has been termed a "cooperative rivalry," "competitive cooperation," and an "adversarial collaboration," reflecting its hybrid nature.²² The bilateral relationship is built on an interdependence that is structural and long term. In recent decades, the quest to develop strategic autonomy from the West has prompted a Turkish pivot toward Moscow and deepened its interdependence with Russia.²³ Though Turkey is often identified as being disproportionately dependent on Russia, in fact Russia relies significantly on Turkey, especially in light of its growing isolation.

One of the most consequential deals that Russia and Turkey made was Turkey's purchase of Russia's S-400 air defense system. The acquisition had a profound impact on Turkey's relations with the United States and other allies. Russia is also constructing Turkey's first nuclear power plant in Akkuyu, hailed as the biggest project in the history of Russian-Turkish relations, and the world's first power plant project implemented according to the build-own-operate model (Rosatom's stake is 99.2 percent).²⁴

There are a variety of opinions on the extent to which the lack of Turkish sanctions has enabled Russia's economic survival and ability to carry out warfare against Ukraine. One opinion is that though Turkey may have indirectly enhanced Moscow's resilience, it plays a "more consequential role on the operational and tactical levels" in helping Ukraine's defense efforts.²⁵ There is no denying Turkey's significant, albeit low-profile, contribution to Ukraine's war effort, and its efforts to bolster NATO's posture in domains other than naval ones in the Black Sea. The critical question pertains to quantifying the damage inflicted on these very policies by Turkey's simultaneous facilitation of Russia. Allowing Russia to evade sanctions poses a detriment, which at times outweighs the benefits of Turkey's actions for its own, Ukraine's, or NATO's security. Turkey needs to be engaged on issues related to containing Russia, sanctions evasion, and reducing its reliance on Russia in the energy sector. One promising avenue for cooperation is potential defense collaboration involving Ukraine, Turkey, and third parties, such as the United Kingdom (see part 3 on military cooperation). The fact that Turkey's approach sometimes aligns favorably with Russia does not necessarily mean that Turkey adopts this approach for Russia's benefit. Identifying ways to safeguard Turkey's interests while simultaneously reducing Ankara's dependence on Russia is crucial in establishing common ground for cooperation between Turkey and the West in the Black Sea region.

Employing Turkey's mediation endeavors

Russia's war against Ukraine has presented Ankara with an opportunity to enhance its international standing by offering mediation between Ukraine and Russia, aligning with its broader strategy of positioning Turkey as a mediator between Russia and the West. Since 2014, Turkey has asserted itself as a bridge between Russia and the transatlantic community, emphasizing that maintaining relations with both Russia and the Alliance is both essential and not mutually exclusive, given Turkey's complex geographical context.

Following Russia's reinvasion in February 2022, Turkey facilitated several rounds of negotiations between Moscow and Kyiv. Ankara, in collaboration with the United Nations, mediated the Black Sea Grain Initiative, which operated for one year until Russia withdrew from it in July 2023.

Turkey has mediated Ukraine-Russia prisoner exchanges, including the 2017 release of Crimean Tatar dissidents from Russian captivity and the 2022 release of 215 Ukrainian prisoners. Turkey also played a facilitating role in the major prisoner exchange between Russia and the West in August 2024, providing Ankara Airport as the venue for the swap and reinforcing its international reputation as a mediator.

There are significant caveats to Ankara's actions as a mediator. While some of Turkey's interventions, such as the grain deal and facilitating a prisoner exchange, have been effective, its efforts to broker a peace settlement in the early stages of the war failed. Ankara is not positioned to change Russia's strategic objectives to subjugate Ukraine. Additionally, its practice of not sharing information or coordinating with its allies has somewhat limited the effectiveness of its initiatives, as noted by a UK official interviewed for this research.²⁶ There is a need for greater engagement with Turkey to explore how its mediation capabilities can be utilized to achieve a lasting and sustainable peace for Ukraine in closer coordination with allies.

Strengthening NATO's posture in the Black Sea

One of the mutual security interests between Turkey and the West is to bolster NATO's flank in the Black Sea. Despite its anti-Western rhetoric, Turkey has contributed to the strengthening of the eastern flank of NATO and its overall capabilities. The country hosts several NATO commands and a major base in Incirlik, and has contributed to NATO's maritime operations and stabilization efforts.²⁷ Post-2014, Turkey has invested heavily in its armed forces and boosted its security cooperation with Ukraine and Georgia, including supporting their NATO membership aspirations. Turkey has also consistently complied with all measures and decisions of the Alliance aimed at enhancing NATO's defense and security posture since 2014.²⁸

However, Turkey's inclination to pursue an autonomous foreign policy often brings it into conflict with its NATO membership, prompting questions about whether Turkey serves as NATO's pillar in the Black Sea or acts as an obstructionist power.

There are indications that Turkey, as a status quo power and a proponent of the principle of regional ownership of security, has sought to maintain a balance of power in the region, curbing more assertive positions of nonregional actors. Amid growing tensions between Russia and NATO, Turkey has chosen a policy of “caution” and defending the status quo.²⁹ This has sometimes led to Turkey limiting NATO’s role in the region, such as preventing the deployment of Active Endeavour operation to the Black Sea from the Mediterranean Sea, where NATO ships patrolled to deter terrorism from 2001 to 2016. Additionally, Turkey’s advocacy for a comprehensive peace agreement between Azerbaijan and Armenia, through platforms like the “3+3” regional cooperation in the South Caucasus, underscores its belief in regional states’ ability to “solve their problems by themselves.”³⁰

The emergence of Russia as a revisionist power intent on reshaping the regional security order has made maintaining the status quo untenable. There is a growing consensus among experts and practitioners that Turkey’s principle of regional ownership has become obsolete in the evolving security environment of the Black Sea. Presently, Turkey seems inclined to focus on cooperation among allied nations in the region and, depending on Russia’s behavior and evolving security dynamics, to revitalize the regional ownership format as the basis for a new security architecture in the region.³¹

Divergent threat perception as a main obstacle to pursue shared interests

Deep-seated divergences in threat perception limit the potential of Turkey and the West pursuing shared interests. Turkey perceives the Ukraine-Russia war as an isolated regional conflict—despite the implications of the war for the regional order that Turkey has meticulously worked to build and sustain. This disparity is evident in the differing levels of attention given to Russia’s war against Ukraine in the everyday politics of Turkey compared to other NATO members.

Turkey’s position in the Black Sea is closely intertwined with its Syria policy, a conflict that has taken precedent in Turkish foreign policy over Russia’s war against Ukraine. While Turkey views Russia as a threat, as commonly referenced by Turkish experts, this sentiment is not openly manifested. Unlike the NATO 2022 Strategic Concept, which labels Russia as “the most significant and direct threat to Allies’ security,” Turkish officials do not use similar definitions, and Russia is not formally defined as a threat at the governmental level. Notably, the necessity of managing Russia on two fronts is unique and contributes to a distinct threat perception. This entails addressing the risks associated with the potential of being outflanked by Russia from both the north and the south.

Turkey’s portrayal of Russia’s war against Ukraine appears to be selective rather than comprehensive. Its attention to that war revolves around three major tracks. The first deals with maritime security and includes issues such as Turkey’s application of the Montreux Convention and demining of the Black Sea. The second track has been

concerned with the Black Sea Grain initiative, a now-defunct deal brokered by Turkey and the UN involving Ukraine and Russia. Lastly, Turkey’s interest lies in continuing to serve as a mediator; it mediated between Russia and Ukraine in the early weeks of the war and facilitated prisoner exchanges, including the 2024 prisoner swap between Russia and the West.

Despite Turkey’s condemnation of Russia’s aggression and Ankara’s refusal to recognize the occupied Ukrainian regions, Turkey’s perception of the war against Ukraine is somewhat similar to the official Russian narrative. Public discourse in Turkey underscores the war as a competition between the great powers, with Russia defending itself from Western encroachment and provocations,³² rather than as an unjust and unprovoked war. In a September 2022 poll, only 21 percent of Turkish respondents considered Russia to bear the primary responsibility for the war in Ukraine, and 46 percent said that Ukraine and Russia are equally responsible.³³

The majority of constituencies in Turkey support the government’s balancing policies following the onset of the war. Similarly, a consensus exists—from the government to the opposition—regarding the importance of the Montreux Convention. Within the political establishment of the country, there is a semblance of agreement that “Ukraine needs to win, but Russia should not suffer defeat either.”³⁴

This situation may stem from Turkey’s perceived grievances regarding insufficient acknowledgment of its security concerns among its Western partners, who presumably overlook the broader threats Turkey faces beyond those in the Black Sea region. While bridging this gap in understanding could prove challenging, it is essential to recognize that the security threats confronting all parties are not fundamentally different.

Conclusions and recommendations

There are numerous areas where the interests of Turkey and its Western allies align, particularly concerning the restoration of regional security in the Black Sea and leveraging the region’s transit potential. However, differences in perception regarding the nature of threats and the preferred policies to address them have frequently emerged.

Turkey’s strained relationship with the West and its autonomous foreign policy approach together impose inherent limitations on efforts to harmonize policies, even in areas where mutual action could yield significant impact through clearer communication and coordination. In reality, the West has limited influence over Turkey’s perception of its national interests, especially in the Black Sea region, given the historical complexities of their relationship.

Special attention should be directed toward emphasizing that Turkey’s pursuit of strategic autonomy must involve reducing its dependencies on Russia and addressing societal, economic, and security vulnerabilities that Russia readily exploits. This underscores the importance of Turkey closing the loopholes that allow Russia to circumvent Western sanctions, for instance stopping the reexport of dual-use goods



Leaders pose for a family photo, on the day of the opening ceremony of the Summit on Peace in Ukraine at the Buergerstock Resort in Stansstad near Lucerne, Switzerland, June 15, 2024. REUTERS/Denis Balibouse

and technology to Russia, thereby preventing the enablement of Russia's malign policies, which has been in direct conflict with Turkey's own interests. Additionally, it is important to acknowledge the presence of and risks associated with Russia's influence operations in Turkey, which serve to amplify anti-Western narratives.

In the medium term, Turkey may be becoming increasingly inclined to contemplate and endorse initiatives aimed at reestablishing a security equilibrium advantageous to Western (including Turkish) interests and implementing some form of provisional security order pending Ukraine's victory. While Ankara currently appears to be one of the few NATO states not engaged in negotiations regarding security guarantees for Ukraine, the current environment seems conducive to practical projects that enhance Ukraine-West cooperation, with Turkey playing an active role. Ankara may be willing to consider multilateral projects aimed at enhancing Ukraine's military capabilities without placing itself at the forefront of confrontation with Russia, yet still providing a more meaningful deterrent against Russia. Turkey's desire to support Ukraine's recovery and reconstruction efforts should also be welcomed.

It's important to address the fragmented security architecture in the region. This can be done by leveraging Turkey's potential by establishing a military cooperation mechanism that complements NATO activities and involves Turkey, Bulgaria, and Romania (with the possibility of including Ukraine, Georgia, and Moldova); and supporting allied and partner countries (e.g., Bulgaria, Romania, Ukraine, and Georgia) in upgrading their naval capabilities and coordinating with Turkey to develop individual maritime security action plans.³⁵ This effort would rely heavily on Turkey's willingness to approve of and engage in these activities. According to Turkey watchers interviewed for this research, there is a prevailing opinion that exploring the idea of establishing new cooperation models in the Black Sea is worthwhile, particularly while the regional ownership principle is defunct due to Russia's position. However, as noted by a UK expert in an interview, it is unlikely that Turkey will take on the role of a "convenor" or an "instigator power" behind all-regional formats (including littoral states plus potentially external NATO powers) with only Russia excluded. Instead,

Turkey is more likely to express interest in initiating and participating in “minilateral” initiatives.³⁶ US-Turkey relations are central to Western engagement with Turkey. Significant changes in Turkey’s stance on contentious Black Sea issues would require a broader reconciliation between Turkey and the United States. Furthermore, the incremental progress toward normalizing EU-Turkey relations has been identified as a significant factor facilitating potential greater coordination in the Black Sea. This could entail prioritizing steps such as upgrading the EU-Turkey customs union, which one of the interviewees considered more achievable than implementing a visa-free regime or revitalizing membership talks. The need to renew a regular and structured foreign and security policy dialogue between Turkey and the EU, focusing on joint strategies in their shared neighborhood, seems to be a priority among many analysts.³⁷

There are areas of overlapping interests where Turkey could benefit from aligning with the common position of its allies, especially amid a broader normalization of relations. Exploring avenues of cooperation and fostering a more cooperative engagement culture is essential. While any unilateral initiative from Turkey that can leverage its influence on Russia should be welcomed, greater emphasis should be placed on fostering closer coordination with allies to make sure that a principle of containing Russia is not undermined by such actions.

To be sure, a significant departure from Turkey’s current stance is unlikely, but as the number of areas of Turkish-Western policy convergence grows, a shift in approach is possible. The goal should be to encourage Turkey to explore these areas and for Western partners to move away from short-term thinking and transactional approaches in dealing with Turkey and instead focus on addressing shared long-term strategic concerns. While it may be unrealistic to expect an immediate alignment of security perceptions, the actual interests of the parties are more closely aligned than is publicly acknowledged.

Dr. Maryna Vorotnyuk is an Associate Fellow at the Royal United Services Institute for Defence and Security Studies (RUSI) in London. Previously, she held the position as Research Fellow in the International Security Studies team at RUSI. She works on security developments in the Black Sea region, Russian, Ukrainian and Turkish foreign policies, and the Russian-Ukrainian conflict. Before joining RUSI in January 2021, she worked as a researcher for the Centre for European Neighbourhood Studies at the Central European University in Budapest (2017-2020), and as a visiting lecturer at the Department of Political Sciences of Comenius University in Bratislava, Slovakia (2015-2017). From 2006 until 2015, Maryna was affiliated with the National Institute for Strategic Studies in Ukraine and the Centre for International Studies of Mechnikov Odesa National University.

Part 2.

Maritime security: Redefining regional order in a new security environment

Serhat Güvenç

Toward a regional security arrangement

This summer, three NATO members from the Black Sea activated the Black Sea Mine Countermeasures Task Group (MCM Black Sea) in Istanbul. The July 1 activation can be viewed as a milestone for maritime security in the region—with sole reliance, at least initially, on littoral states (Bulgaria, Romania and Turkey) for force generation.³⁸ In that regard, it may be considered a reincarnation of the Turkish idea of regional ownership in addressing maritime security issues in the Black Sea.

The task group represents a regional response to the growing threat of mines. It is aimed at ensuring the safe passage of ships in the Black Sea both in general and especially in the new grain-export corridor established by Ukraine after Russia's withdrawal from the UN Black Sea Grain Initiative in July 2023.

Arguably, this task force represents a compromise position for littoral and nonlittoral stakeholders. First, its NATO aspect is much less pronounced than Bulgaria and Romania would have preferred, but more than Turkey would have welcomed in a perfect world. Ultimately, it is a task force assembled by NATO members outside the institutional framework of the Alliance to enhance maritime security in the Black Sea and maritime situational awareness of NATO in the region. In the activation ceremony, there was a marked absence of NATO insignia and language, yet it was also stated that this regional collaborative effort could be extended to include nonlittoral members of the Alliance in the future. It was the prospect of that inclusion that made the Turkish initiative acceptable to Bulgaria and Romania.

MCM Black Sea is the most recent security arrangement reflecting a compromise within NATO regarding the extent of involvement for the Alliance as a whole and its nonlittoral members in the regional maritime domain. As such, it perfectly captures the dilemma of crafting security practices and institutions in a region that faces the unraveling of the rules-based international order. The weakening of international norms and institutions have inevitably determined regional actors' approaches to maritime security.

This section argues that the structure and processes of the international system have defined security dynamics in general, and maritime security dynamics in particular, in

the Black Sea since the end of the Cold War: for regional actors, geographical, historical, and legal factors have driven or constrained alliance and collaboration approaches and practices. The section begins with a discussion of maritime security institutions and practices attempted in the region before Russia turned into a revisionist actor. The period between 2014 and 2022 merits particular attention, as this was when all the post-Cold War regional security arrangements collapsed. This situation has given rise to competing visions of maritime security in the Black Sea. Consequently, the section discusses such visions. Finally, it closes with several predictions regarding the future configuration of security arrangements and respective roles of international organizations such as NATO and the European Union, as well individual actors including Russia, Ukraine and Turkey. The fluidity of regional geopolitics complicates the situation, and it is probably safe to conclude that a lasting maritime security arrangement will be closely linked to the eventual redefinition of the relationship between the EU and Turkey, as two rival maritime security providers.

Maritime security in the Black Sea

Russian annexation of Crimea in 2014 made the Black Sea a policy concern for the EU, NATO, and the United States,³⁹ but the region has always been a major security consideration for both Turkey and Russia, particularly in the context of managing their regional competition. Their competition management practices have resulted in a convergence of Turkish and Russian views on the undesirability of nonlittoral states' involvement in the region.

This convergence has led some to conclude that the Black Sea has become a Russian-Turkish condominium.⁴⁰ By narrowly focusing on the pragmatic and practical cooperation, this approach misses or disregards the reality that the essence of interactions between these two regional heavyweights is competition. Their relations have waxed and waned between outright confrontation to reconciliation and collaboration even in the last decade. The two countries are involved in fierce rivalries in other parts of the world, such as Libya and Syria. Transactional foreign policies have served their core-interests. Russia's exclusion from, and Turkey's marginalization in, the rules-based international order has acted as a catalyst for bringing these two major players in the Black Sea closer.

In terms of cycles of hostility and collaboration between Ankara and Moscow, it is worth recalling the situation after a Russian SU-24 Fencer bomber was shot down by Turkish F-16s on November 24, 2015 near the Turkish-Syrian border. In the months following the downing, the military and naval situation between Russia and Turkey resembled that of the World War II era,⁴¹ with one difference: Turkey is a member of NATO. But for eleven months in 2016, that membership was of little help to Turkey. Russian A2/AD bastions in the north and south rendered Turkish air and naval activity beyond its borders risky ventures, for fear of Russian revenge-seeking. Meanwhile, US warships that patrolled the Black Sea as part NATO's ballistic missile defense (BMD) were harassed by Russian aircraft. At the height of the Turkish-Russian crisis,

President Recep Tayyip Erdoğan called NATO to the rescue. Otherwise, he warned, the Black Sea would soon turn into a “Russian lake.”⁴²

The November 2015 bomber incident proved that from a purely material capabilities perspective, Turkey lacks the means to “balance” Russia on its own.⁴³ It has always needed partners and allies, regional or extraregional, depending on the distribution of power internationally and regionally among status quo and revisionist powers. Notably, multilateral regional arrangements were enacted in the post-Cold War era to accommodate Russia as a legitimate stakeholder in the Black Sea security.

How recent challenges to the regional order affected Turkey’s policy

Tensions were evident before the annexation of Crimea. The Russian-Georgian War of August 2008 signified a turning point for Russia and added momentum to its military modernization and transformation efforts. Before the war, Turkey had supported Georgia’s military modernization. Ankara had invested in an airfield where Turkish military aircraft could be based in times of need, and supplied Georgia with coast guard boats. The Marnuli airfield and Turkish-supplied coast guard boats were among the military targets destroyed by the Russian artillery in the early stages of the war. In other words, Ankara’s attempts to gain traction in the southern part of the Caucasus were ultimately and effectively checked by Russia.

The war brought about de facto changes in the territorial and maritime status quo in the Black Sea. South Ossetia and Abkhazia declared their independence with Russian support. The Abkhazian declaration of independence created the potential for great impact on regional geopolitics, considering it gave rise to an unrecognized state with access to the Black Sea.

The idea of regional ownership and its mechanisms received a substantial blow, but nevertheless survived the war, partly because the Obama administration had not yet dismissed the idea of accommodating Russia in the liberal international order. Again, the strategic choices of the global leader largely determined the parameters of interaction regionally.

In November 2010, after a general decline in Turkey’s naval standing, Ankara endorsed NATO’s new strategic concept, which called for development of ballistic missile defense system (commonly known as “the missile shield”). At a global level, Russia saw this as a way station to the development of a US missile defense system that would eventually cancel out Russia’s nuclear deterrent and weaken its international status. Additionally, two aspects of NATO BMD system were destined to increase the Alliance’s footprint in the region: the ground-based interceptors, to be deployed in Romania, and the regular rotation of the US Navy’s Aegis-class destroyers as sea-borne assets of the system into the Black Sea.

Russian apprehensions grew after Ankara agreed to the deployment of an X-Band missile detection system and tracking radar in Turkey’s southeast as part of this missile defense structure, as well as ascent for Aegis destroyers’ frequently appearing in the

Black Sea. Russia countered this move by deploying S-300s and the latest S-400 air defense missiles in its Southern Military District, beginning in 2012. These were the core capabilities around which an A2/AD sphere would eventually be erected in the region.

In hindsight, there is a general agreement about how the West missed Russian President Vladimir Putin's messaging regarding his intentions in 2007. Although he revealed them in his speech at the Munich Security Conference, it failed to grab the attention of his Western audiences. Similarly, Russia's ambitions in Georgia were largely overlooked by the West.

The 2014 Russian annexation of Crimea was the final nail in the coffin for the regional security architecture championed by Turkey. With this annexation, Moscow was able to build a formidable A2/AD sphere covering the Black Sea, extending to the shores of Turkey.⁴⁴ Russia then began to voice stronger opposition to the naval presence of nonlittoral states in the Black Sea.⁴⁵ Moreover, Moscow added new weight and momentum to its naval reconstruction program for the Black Sea fleet. The plan foresaw the addition of six new submarines, six frigates, and four new corvettes armed with cruise missiles by 2020. This signified a tripling or even quadrupling of Russia's naval strength in the Black Sea.⁴⁶ Russian revisionism rendered Turkey's status quo policy in the Black Sea unsustainable and untenable.

It's important to note that during the 2014 crisis in Crimea, Turkey carefully assumed a low profile. For instance, Ankara did not cancel or postpone plans to send the Turkish Naval Task Force "Barbaros," comprising two frigates, a corvette, and a replenishment ship, for a trip around the Horn of Africa during this time of high tensions between NATO and Russia.⁴⁷ By sending a naval force of this size on such a distant mission, Ankara showed that it was not interested in deepening the crisis between Russia and NATO, nor did it want to take sides. Hence, Russian-Turkish political, economic, and naval relations survived the Crimean crisis with perhaps some Turkish loss of confidence in Russia.

Now that Turkey's maritime ambitions go beyond the "blue homeland" (the Eastern Mediterranean area it regards as its exclusive zone), Ankara may find itself in a similar situation: needing to make a hard choice between committing its assets to address maritime security challenges in its immediate neighborhood or to support its growing overseas commitments from Somalia to Libya and Qatar. Importantly, maintaining the status quo in the Black Sea indeed helps Turkey focus more of its attention and resources away from the Black Sea. This provides yet another incentive for Turkey to resist any attempt to upset the existing balance of maritime power in the region.

Naval situation before the broader Russian attack on Ukraine

By 2016, Russia had secured a comfortable degree of naval superiority in the Black Sea. As early as in September 2016, Russian Chief of Staff General Valery Gerasimov pronounced that the days of the Turkish Navy's mastery in the Black Sea were over. At the time, the Turkish Navy was set to receive the last two of four indigenous Ada-class

corvettes (MILGEM), ordered in the previous decade. The second batch of four more units was canceled in favor of four more capable, I-class frigates based on MILGEM basic design. The Turkish submarine service was to receive six German 214 air independent propulsion diesel submarines. To bolster the Turkish navy's blue water capabilities, a Juan Carlos-class strategic projection ship was ordered to be built by Turkish shipyard Sedef under license from Spanish shipbuilder Navtia.

Despite these various naval-development attempts, Russia could comfortably claim mastery of the Black Sea when it unleashed its attack on Ukraine in February 2022. It had a formidable array of combat and auxiliary vessels supported by an impressive naval air power stationed in Crimea.

At this time, other littoral states began focusing on their poor naval capabilities. Ukraine, which had inherited among others a single Kirvak III-class frigate (Hetman Sahaidachny) from the Soviet Union, placed an order for two Turkish Ada-class corvettes to modernize its navy in December 2020, with an option for two or three more units. The Romanian Navy had a single submarine for training purposes only. The latest additions to the surface fleet consisted of two ex-British Type 22 frigates purchased in 2004. It had another frigate, a Romanian design, and a motley collection of mostly Cold War-era smaller surface vessels. In 2019, French shipbuilder Naval Group was awarded a contract to build four Gowind-class corvettes for the Romanian Navy for €1.2 billion. These frigates were in way Romania's response to Russian annexation of Crimea in 2014. Like Romania, Bulgaria relied on Cold War-era Soviet designs, with the exception of three Wielingen-class multirole frigates and three Tripartite-class mine hunters, received from Belgium in 2004; its navy also ordered two multirole corvettes from German shipbuilder Lürssen Werft in December 2020.⁴⁸

This mastery, however, would not even last past the first year of the war. In March 2022, Turkey closed the straits to the warships of belligerents at the request of the Ukrainian government. Turkey's decision, in effect, turned the Black Sea into the maritime equivalent of a boxing ring, denying belligerents the opportunity to reinforce their existing fleets with units from other theaters and/or countries.⁴⁹ Since then, the Russian Black Sea fleet has suffered huge losses including a guided missile cruiser, several amphibious assault ships, and an improved Kilo-class diesel submarine. So long as the war goes on, Russia will be unable to replace its losses, increasingly a hostage to the Black Sea than its paramount.

The prospects for Russia to recover naval dominance in the Black Sea are slim. Since March 2022, Ankara has managed to persuade its non-Black Sea littoral NATO allies to keep their warships away from the Black Sea to reduce the risk of escalation. Although this may be temporary relief for Russia, the Kremlin has had to withdraw its naval assets to the east to avoid further losses to Ukrainian standoff anti-ship and air-to-ground missiles. The introduction of US Army Tactical Missile Systems (ATACMS) into the war prompted the redeployment of Russian air and naval air assets away from Crimea and the Black Sea coast. Russia, thus, has lost the tactical and operational momentum that it clearly possessed in the initial months of the war. The situation in

the Black Sea reflects the overall change in the character of war from maneuver to attrition. In the meantime, as the Russian Navy is worn down, others seek to increase their naval strengths. By the time the war ends, Russia may face a radically altered and very unfavorable naval balance of power in the Black Sea.

At present, Ukraine has two Ada-class corvettes on order from Turkey, while Bulgaria has plans to procure two second-hand submarines, and Romania has plans to acquire three newly built submarines based on a French design. The latter received two Sundown-class mine countermeasures vessels decommissioned by the Royal Navy. Meanwhile, Romania canceled the contract for Gowind-class corvettes; according to media reports, Turkish STM offered Ada-class corvettes for the new tender, which would make Romania the third Black Sea navy to operate them. In that case, a common platform would likely contribute to closer cooperation and interoperability between Romania, Turkey, and Ukraine.⁵⁰

What does the future hold?

Russia has lost sea control in the western Black Sea. Its naval blockade of Ukraine's remaining coastline did not survive the first year of the war. The sinking of the cruiser Moskva, the flagship of the Russian Black Sea fleet, indeed symbolized the demise of the Russia blockade. Ever since, Ukraine has maintained somewhat secure access to the Black Sea, on which its future as a sovereign and independent state hinges. The western Black Sea is now effectively denied to the Russian Navy's surface vessels. Moreover, Ukrainian attacks on command and control centers, A2/AD assets, and shipyards, have substantially degraded Russia's ability to sustain its maritime power in the Black Sea—now a wholly contested maritime theater of operations for both belligerents. Russia is unlikely to attempt to reclaim it, having refrained from challenging or disrupting Ukraine's new grain corridor in the maritime domain. Some Turkish naval observers are of the opinion that Russia may be content with the status quo, and has little to gain from escalation in the maritime domain. Therefore, Russians cannot interrupt maritime traffic in the new grain corridor unless it is willing to take the risk of escalation.⁵¹

The balance of maritime power has turned, but that does not mean NATO has secured sea control. For NATO to maintain this favorable balance of maritime power—with Russia effectively denied the western part of the Black Sea—requires Turkey's maritime capabilities. For instance, Turkish naval and naval air assets provide around 65 percent of the recognized maritime picture in the Black Sea.⁵² Turkey is capable of performing NATO's functions alone without any other littoral or nonlittoral member of the Alliance. It has accumulated the required capability and competence to fulfill missions alone. Indeed, it was the only NATO member in the Black Sea region that continued to invest in additional naval capabilities in step with Russian naval modernization, while Bulgaria and Romania lagged behind both Russia and Turkey.⁵³ Considering that Russian effectiveness in the Black Sea has gone down to a tolerable level, NATO's direct maritime presence is no longer warranted.

There have been talks of transferring warships and/auxiliary vessels from some NATO members to Ukraine. The debate started in Germany first,⁵⁴ and reached a new height with Britain's decision to donate two ex-Royal Navy Sundown-class mine hunters to Ukraine. Turkey made it known that it would not allow their transit through the Turkish Straits as long as Article 19 of the Montreux Convention is in effect. The former supreme allied commander Europe for NATO, Admiral Stavridis, argued that mine hunters were defensive ships and therefore exempt from the Montreux restrictions.⁵⁵ In both cases, the debate revealed the depth of knowledge (or lack thereof) among Turkey's NATO allies of the legal intricacies of the Montreux Convention. A common argument is that freedom of navigation should be implemented without any limitations as set forth in the Third United Nations Conference on the Law of the Sea (UNCLOS III); ironically, the Montreux Convention limitations are recognized as deviations from freedom of navigation for warships by UNLCOS III. Therefore, the wording of the Article 19 does not leave any room for a liberal interpretation of the convention to allow transit of warships (and auxiliaries) of the belligerents. It does not recognize any distinction between offensive and defensive ships either.

Of course, there is nothing in the convention that would restrict or prohibit transit of warships acquired by the nonbelligerent Black Sea powers which may later contemplate to transfer such ships to Ukraine. However, such a transfer could be considered a hostile act and risk bringing NATO directly into the war.⁵⁶ Such a course of action is inadvisable unless NATO deliberately pursues direct entanglement in the conflict.

On the other side of the coin, there have been calls on Turkey to close the Turkish Straits for merchant marine traffic to and from the Russian Black Sea ports. Heeding the calls would entail ending the freedom of navigation for Russian merchant vessels, particularly those involved in transporting war materials and grain exports. It's worth noting that the Montreux Convention establishes a permissive transit regime for merchant vessels, even in times of war, between the littoral states. Freedom of navigation is the essence of that regime, and past attempts to interdict and seize merchant ships transporting war materials have been overturned by national and international courts. This was firmly established after a Greek Cypriot-flag cargo ship, Cape Maleas, was seized by the Turkish authorities in the Bosphorus in October 1991. The cargo ship was chartered by the Islamic Republic of Iran Shipping Lines (IRASL) to carry arms and ammunition from the Bulgarian port of Burgas to Iran. Its cargo was declared as "special equipment," and the ship was seized for arms smuggling by the Turkish Coast Guard. The court authorization for seizing the ship was later overturned by the Court of Appeal in Turkey on the grounds that merchant ships enjoy absolute freedom of navigation in the Turkish Straits under the Montreux Convention, so long as Turkey is not at war with the country of flag or the country that chartered the ship.⁵⁷ Subsequently, IRASL sued Turkey in the European Court of Human Rights (ECHR) for unjustified control of property. In 2007, the ECHR decided that Turkey's action constituted a violation and awarded the applicant €35,000 for costs and expenses.⁵⁸ Therefore, under the current transit regime, and in view of the decisions by the



BOSPHORUS STRAIT (June 26, 2021)
The Arleigh Burke-class guided-missile destroyer USS Ross (DDG 71) transits the Bosphorus Strait en route to the Black Sea. (U.S. Navy photo by Mass Communication Specialist 2nd Class Claire DuBois/Released)

national and regional courts, Turkey cannot justify blocking merchant traffic to and from Russian Black Sea ports. The freedom of navigation remains the cardinal rule in regulating the transit of merchant vessels in the Turkish Straits.

Conclusions and recommendations

The turn of events since 2008 points to a clear pattern in Russian behavior in the Black Sea. Moscow had been responsive to regional initiatives, so long as they were perceived to be complementing efforts to bring Russia into the Western fold or the liberal international system. In 2008, the incoming Obama administration chose to pursue a reset and, therefore, did not attempt to punish or exclude Russia after it invaded Georgia: the Black Sea regional security architecture managed to hold despite the war. After 2014, Russia transformed into an adversary to be checked. Gradually, nearly all institutional bonds between the West and Russia were dismantled. This inevitably had ramifications for regional security arrangements, which could no longer complement arrangements at the global level. In short, there was nothing left to complement at the global level through regional cooperation.

Ironically, Ankara regards the United States as a potential revisionist extraregional power. Its tendency to question and occasionally challenge the relevance of the Montreux Convention contributes to Turkish apprehensions about Washington's intentions. Moreover, the US military interventions in the Middle East, particularly in Iraq, haunt Turkish policymakers and the public alike regarding the destabilizing consequences of Great Power involvement in a neighboring region.⁵⁹ While Ankara continues to grapple with the fallout from the US invasion of, and subsequent withdrawal from, Iraq, it fears prospects for destabilization of comparable magnitude to its north. Therefore, Ankara values the Montreux Convention as a tool for preventing sudden changes in regional geopolitics.

Fundamentally, the US and British air control over the western Black Sea facilitates Turkish primacy in the Black Sea, ensuring that they will remain the most relevant nonlittoral actors in Black Sea security for the foreseeable future.⁶⁰ Both have committed to support MCM Black Sea, if needed.

Sea mines are the most serious among current maritime security challenges. The MCM Black Sea was devised to tackle this challenge. In many ways, the MCM represents the latest manifestation of Turkey's long-standing regional ownership idea. The absence of NATO imagery and language is in line with Turkish thinking to exclude nonlittoral powers from the Black Sea.⁶¹ However, the MCM has extended Turkey's relevance to regional maritime security and affirmed its credentials as the primary maritime security provider there. Indeed, it may even be considered a scaled-down version of the BlackSeaFor, tailored to NATO purposes. Its future depends on the degree of commitment from Romania and Bulgaria.

There are indications that the EU may be contemplating a Black Sea strategy without regard to Turkey and its concerns. This approach may enjoy the support of EU members such as France, Greece, Bulgaria, and Romania. In its June meeting, the European Council made the following statement:

The European Council reaffirms the importance of security and stability in the Black Sea and invites the Commission and the High Representative to prepare a Joint Communication on building an EU strategic approach to the Black Sea.⁶²

Romania and Bulgaria may be tempted to bring the EU in, as a counterbalance to Turkey's influence as the primary maritime security provider to the region and as the strongest NATO member in the Black Sea. Persistence of the EU's exclusionary practices may be self-defeating and drive Turkey even closer to Russia. Although Kemal Kirişçi, an international relations expert and nonresident senior fellow at Brookings, sees MCM Black Sea as an indicator of a subtle convergence of Turkish and US policies in the region, he draws attention to the dangers of excluding Turkey when devising a Black Sea strategy.⁶³

On the other hand, even if Turkey adopts a more inclusionary approach, a major issue is that the United States or the EU may no longer function as stable anchors for Turkey's international and regional behavior. Both are undergoing a process of redefining their global roles, and therefore cannot serve as stable anchors until they come up with consistent and coherent visions to confront current security problems at the global level. In short, as there is a great deal of uncertainty, and Turkey will probably be less responsive to US and EU leadership attempts, from Turkey's perspective, their pro-Israeli attitudes have eroded their claims as the moral champions of the rules-based international order.

Finally, a Russian defeat, though it would mark a significant weakening of Russian military threat regionally, runs the risk of complicating the maritime security situation in the Black Sea for Turkey. Such an outcome could eventually lead to the unfolding

of the Montreux regime. If the war ends with a Russian defeat, peace terms may include Moscow's acceptance of a new status in the Black Sea. In other words, if Russia capitulates, Ankara may find itself isolated as the only champion of the status quo on the Turkish Straits. Current parties to the convention include Australia, Bulgaria, France, Greece, Romania, Russia, and Serbia. Of the original signatories, Japan withdrew in 1951, whereas the Soviet Union was succeeded by the Russian Federation and Yugoslavia by Serbia. This lineup does not seem very promising when it comes to Ankara building a pro-status quo coalition.

Takeaways and challenges

The Russian invasion of Ukraine has upended our understanding of European security and its institutions. The course of events re-affirmed that NATO, once considered by some as brain-dead, remains the core institution of the European security architecture to tackle revisionist Russia's military threat.

At this point, a crucial question is how to keep Turkey in NATO so that it is an asset rather than a liability for European security. There are two possibilities: the current war will either play a catalyst role in bringing Turkey back into the fold of mainstream European politics or will add momentum to its alienation from the West in general.

The war in Ukraine has given a new lease on life to the EU's pursuit of strategic autonomy and simultaneously added momentum to Turkey's ambitions for a strategic autonomy at a regional level. Recently, Vice-President of the EU Commission Josep Borrel admitted "growing Turkish and Russian influence has derailed the EU's 'Mediterranean Order.'"⁶⁴ If this is truly the case, the EU's emerging perception of Turkey as a strategic competitor may frustrate its attempts to promote a regional maritime security order in the Black Sea. Hence, Turkey's role in the new security environment will ultimately depend on choices made in Ankara, Washington, and Brussels and to a lesser extent in Moscow.

Dr. Serhat Güvenç is currently Professor of International Relations and the Dean of the College of Economics, Administrative Sciences at Kadir Has University. Previously, he held faculty positions Istanbul Bilgi University (2000-2010) and lectured as visiting Assistant Professor of History at the University of Chicago (2006), as adjunct professor of international relations at Koç University (2008 and 2009) and Bosphorus University (2014). Dr. Güvenç's research interests include Turkey's foreign relations and modern Turkish military and naval history. He has authored or co-authored five books. His articles have appeared in Middle Eastern Studies, International Journal of Naval History, Uluslararası İlişkiler, Exotierika Themata (Greek), Journal of Strategic Studies, Southeast European and Black Sea Studies, International Journal, Turkish Studies, Turkish Policy Quarterly, The Journal of Military History, the Journal of Cold War History and War and Society.

Part 3.

Defense cooperation: Turkey's triangular balancing in the Black Sea region

Rich Outzen

Assessing the strategic environment

In its Black Sea neighborhood, which includes Russia, Ukraine, Romania, Bulgaria, and Georgia, Turkey faces a centuries old dilemma.⁶⁵ On one hand, Turkish leaders see a strategic imperative to oppose the hegemony of Russia, the only regional actor with an imperial appetite. On the other hand, trade ties and mutual strategic vulnerability compel Ankara to seek the least risky modus vivendi with Moscow—and to avoid interventions by extraregional powers that could escalate into direct warfare between Russian and Turkish forces.

Time tests ideas and approaches. During the Cold War, a deep disparity between Soviet and Turkish power compelled Turkey to balance Russia through NATO membership, which included the stationing of American troops, aircraft, and tactical nuclear weapons on Turkish soil.⁶⁶ After 1991, the gap between Russian and Turkish deterrent capabilities decreased, while messy Western military interventions on Turkey's southern borders left Ankara disinclined to trust those Western powers in the Black Sea region. Consequently, Turkish strategy in the region shifted from NATO-assisted deterrence of Russia to a triangular balance in which Turkey seeks to offset Russian power by strengthening both its own capabilities and those of non-NATO allies (Ukraine, Azerbaijan, and Georgia), defense cooperation with littoral NATO states without broader NATO presence, and maintaining robust economic and diplomatic ties with Russia while developing military deterrent measures against it.

The goal of triangular balancing has been a constrained competition, or condominium that compartmentalizes conflict, preserves trade and diplomatic contacts, and prioritizes military de-escalation.⁶⁷ A key part of this approach has been supporting Ukrainian sovereignty without seeking total Russian defeat. Prior to the 2014 Russian invasion of Ukraine, Ankara sought to co-opt Russia in local security initiatives that minimized the role for extraregional states. After 2014, Ankara focused on a military force-building project with Ukraine, which accelerated after Russia's expanded invasion in 2022 and led to defense industrial symbiosis in several areas.

Turkey wants both Ukraine and Russia, as neighbors, to survive—and that means Ankara wants Moscow to have incentives to settle for less than outright victory. For the foreseeable future, this objective will require an activist stance in military and diplomatic affairs in the region—and neither acquiescing to NATO's lead nor Russian

revanchism in the process.⁶⁸ As the United States crafts a new Black Sea strategy, and NATO plans for enduring commitments to Ukraine, both would do well to understand this Turkish approach, and work effectively alongside it.

Doing so entails three critical elements: NATO must strengthen Turkey’s own deterrent capabilities vis-à-vis Russia, recognize and facilitate Turkish leadership in NATO operations in the region, and consult Ankara regarding conflict termination modalities, especially arrangements for peacekeeping forces and the approach to Ukraine’s and Georgia’s NATO candidacy. In other words, the West would be wise to support a stable strategic triangle in the region consisting of Russia, Turkish-aligned non-NATO members (Ukraine, Azerbaijan, and Georgia), and NATO via its Black Sea littoral members.⁶⁹ It should avoid a strict binary equation in the region, recognizing that the combination of Turkey’s participation in NATO, its defense ties to non-NATO countries, and its continued engagement with Russia provide unique tools to influence Russian behavior in both the present war and the regional future.

Successful deterrence in this manner may enable the region to emerge from the war as what President Erdoğan has called a “basin of peace” in which Russia has a legitimate but constrained role.⁷⁰ Ankara would welcome a settlement that leads to energy deals and trade that Russia cannot, or will not, disrupt.⁷¹ Turkish foreign policy statements have made clear that Ankara sees this combination of deterrence, de-escalation, and economic mutual interest as the key to the future security of the region—and a Turkish role will be crucial.⁷² Given Russia’s apparent ability to sustain the war and the West’s limited appetite for escalation, it is the security strategy that offers the greatest chance of success in the coming years.

Turkey’s regional role and interests

Turkey has long pursued a Black Sea security architecture that supports Ukrainian independence, balances Russian power without directly confronting it, and strengthens other littoral states (NATO and non-NATO).⁷³ Ankara developed a politico-economic forum, BSEC; multilateral security mechanisms including Russia, Black Sea Force, and Black Sea Harmony; and a multinational brigade comprised of units from NATO countries operating independently of NATO command, the Southeast European Brigade (SEEBRIG).⁷⁴

Then Ankara witnessed Moscow’s willingness to launch hot wars against smaller neighbors (such as Georgia in 2008), and that it was not likely to be restrained by an inclusive approach and trust-building measures.⁷⁵ This realization encouraged Turkish leadership to enhance their own hard-power deterrent capabilities, a process that played out over a decade as Turkey developed significant power projection capabilities—from Libya and Syria to the Caucasus and beyond—and demonstrated a willingness to use them against Russian forces or proxies in regional conflicts.⁷⁶

Vladimir Socor, a Romanian-American geopolitical analyst, discussed the evolution of Turkey’s approach to the region in the face of Russia’s increasingly aggressive actions:

There have been and remain limits to how far the West can go on “improving Turkish attitudes” on the Black Sea. Over a twenty-year period, the Turks staunchly opposed NATO activity there, for example by stopping the attempt to expand Operation Active Endeavor from the Mediterranean to the Black Sea. Turkish policy then was a condominium with Russia, while minimizing Western presence. This entailed allowing only what the Montreux Convention, strictly construed, would allow. Instead of a steady Western presence, Turkey tried to establish a Black Sea Force naval patrol mechanism that included Russia—the hope for a neighbors’ condominium. Before Crimea, Turkey could believe it had naval parity. After Crimea, the sense of naval parity was gone; the ability for land-based forces to strike at sea had to be added to the naval equation. Russia now appeared superior in the overall balance of power in the [Black Sea region], especially in terms of anti-access and area denial (A2AD) weapons. Turkey appears at times to be intimidated by Russia in the Black Sea, hunkering down near its own coast. It can be argued that Turkey tried to avoid conflict by appeasing Russia even after Georgia [in] 2008, when the Russian Navy attacked and destroyed the Georgian coastal guard in port [at Poti]. Turkey continued the Black Sea Force—though Romania wanted to end it. Finally, the 2014 invasion of Crimea metaphorically sank the Black Sea Force as a concept.⁷⁷

Turkey’s public response to the 2014 Russian invasion of the Crimea and Ukraine’s eastern provinces was relatively muted,⁷⁸ but Ankara has consistently supported Ukrainian sovereignty over these territories,⁷⁹ supported UN condemnations of the invasion,⁸⁰ and called for Ukrainian accession to NATO.⁸¹ More importantly, Ankara paired cautious diplomatic opposition with stout efforts to bolster Ukrainian defense capabilities far earlier than the West. Initial discussions on defense industrial cooperation took place in 2015, with senior officials from the two countries agreeing to elevate such ties to a strategic level in early 2016, covering a broad array of programs and technologies.⁸² This came at a time of escalating Russo-Turkish tensions,⁸³ and reticence by Washington and European allies to arm Ukraine.⁸⁴ Within five years this deepening defense relationship yielded more than thirty joint defense projects, including drones, motors, electronics, ground systems and naval vessels. Many of these projects involve complementary production and development rather than simple sales or transfers.⁸⁵

Less publicly, Turkey in 2016 appears to have sent a multiservice assessment team to lay the groundwork for training programs involving staff officers, special forces, and naval personnel.⁸⁶ Turkish support continued in the years prior to Putin’s February 2022 escalated invasion, despite the risk of Russian retaliation.⁸⁷ Turkish-made TB2 Bayraktar armed drones made their debut in Ukraine in October 2021, fighting against Russian proxies in Donetsk.⁸⁸ Turkish support for the equipping and training of Ukrainian defense forces predates the current phase of the war and seems certain to continue after its conclusion. The contributions to Ukraine’s defense from the United States and Germany have surpassed Turkish aid over the past two years, but the

timing of Turkish assistance was especially impactful before the larger donors fully beginning in 2022.

Turkish impact on the war in Ukraine

Despite Russian protestations, Turkish military and defense industrial support continued up to and beyond February 24, 2022.⁸⁹ The TB2s drew attention through widely distributed videos of their strikes on advancing Russian columns, and were memorialized in song by Ukrainians grateful for their role in blunting the Russian drive on Kyiv.⁹⁰ Other weapon systems proved useful, too. Kirpi armored vehicles⁹¹ have provided protection for light units and logistics convoys, while Turkish machine guns have enhanced ground unit defensive capabilities.⁹² Turkish shipyards have produced Ada-class corvettes to strengthen Ukrainian naval defense, though their extended delivery schedule and limited basing options limit near-term impact.⁹³

Artillery ammunition has emerged as a mainstay of Turkish defense industrial support to Ukraine. Turkey's Mechanical and Chemical Industrial Corporation produces a significant portion of NATO's 155 millimeter ammunition supply, and has exported directly to Ukraine since the war began.⁹⁴ These may have included rounds with dual-purpose improved conventional munitions, or DPICM ("cluster bombs"), a potent tool against Russian ground forces, though Turkey denies doing so.⁹⁵ The Turkish firm Repkon has begun production of 155 mm ammunition at a factory in Texas, which should increase American production by a third, and will be used to further augment Ukrainian supply should the war extend for years.⁹⁶ Turkey has become the leading exporter of artillery ammunition to the United States, has made massive ammunition deliveries directly to Ukraine, and is key to NATO's efforts to match Russian output as the war in Ukraine has become, among other things, a large-scale, continuous artillery duel.⁹⁷

What do experts think about how determinative this has been to the course of the war?

Can Kasapoglu, a Turkish defense analyst at the Hudson Institute, noted that Turkey stepped in when no others would, and when battlefield conditions maximized the impact of the aid:

Turkish assistance was like a cortisone shot, effective and crucial to keep the body moving despite pain. It was critical at the outset that Turkey was contributing TB2s when other NATO members were arguing about nonlethal aid like helmets. They were very useful at a time when the battlefield was very messy, and the Russians were struggling to put together multiple-corps level operations—unlike anything they had seen in 2014, in Georgia, or in the Chechen wars. There were gaps in Russian integrated air defense, clumsy logistics, incomplete battlefield intelligence and surveillance. The Ukrainians pursued a different target set than the Russians anticipated—they were more interested in hunting down bread trucks and fuel tankers than artillery or main battle tanks, because they knew logistics would be the Achilles' heel of a



U.S. and Turkish military forces conduct the third ground combined joint patrol inside the security mechanism area in northeast Syria, Oct. 4, 2019. (U.S. Army photo by Staff Sgt. Andrew Goedl)

drive on Kyiv. Turkish aid also gave a huge political boost—remember that at that time the West was offering Zelensky a flight out of Kyiv, while he was committed to staying and resisting. It was a critical turning point in the political and popular will to resist—and helped rally the resistance and defense while singing the praises of TB2 Bayraktar. It may be less critical now, but was hugely critical then.⁹⁸

Vlad Socor, a senior fellow at the Jamestown Foundation, expressed skepticism that the support has been sufficient to ensure Ukrainian victory, though it may have staved off immediate defeat:

There may not be an end to the war in the commonly understood sense. References to “when peace comes,” or “after the end of the war,” lose meaning in the age of hybrid war, with no clear delineation of war and peace. At best there will be an armistice, codified or not. It will become frozen with varying degrees of conflict continuing, with spikes of high intensity, and long-term low intensity conflict. This is likely to resemble the state of affairs from 2015 to 2022 in Ukraine. It can further be argued that Russia has already won, in the sense that Hans Petter Midttun asserted in 2023—Russia does not need to win another square centimeter of [Ukrainian] territory in order to win the war. It cannot be dislodged; it could have been dislodged in summer 2023 if the Biden admin had not self-deterred. Ukraine has suffered a catastrophic hemorrhage of civilian population to the West and to Russia. Depopulation, destruction, lost access to most of Black Sea have ensued. The West is

prepared to provide some military protection to rump Ukraine, and in that sense Turkish aid will become even less relevant over time.⁹⁹

The future course of the war in Ukraine is unclear as of mid-2024, but the role of Turkish arms, training, and defense industrial cooperation heretofore has been significant. Turkey helps Ukraine for several reasons: two-way technology transfer, profit, supporting NATO—but above all else, the knowledge that Ukrainian defeat would transform Russia into a far more dangerous neighbor.¹⁰⁰

Possible areas of cooperation with the West

In the coming years, and no matter the course of that war, Ankara possesses unique assets to stabilize the region through its:

1. Defense industry.
2. Naval power.
3. Geography/control of the straits.
4. Ability to expand cooperation within the Organization of Turkic States (OTS).
5. Diplomatic agility.

In the national defense sector, for instance, Turkey has begun production of a fifth-generation fighter aircraft, the Kaan, with a prototype flown on February 21, 2024. Ukraine has indicated that it will buy, and perhaps help build, the Kaan.¹⁰¹ Overall, Turkish defense industry output nearly doubled between the 2008 Georgia war and the 2022 invasion of Ukraine, making Turkey the world's eleventh-largest arms exporter (with 1.1% of global output), and dramatically reducing reliance on arms imports.¹⁰² The defense industrial partnership between Turkey and Ukraine is a good fit, and goes both ways: Ukraine produces systems that Turkey has lagged in, such as high-thrust engines for aircraft.¹⁰³

Ukrainian forces have destroyed between 20 percent and 30 percent of the Russian Black Sea fleet,¹⁰⁴ in some cases using Turkish systems, shifting the long-term naval balance of power in the region. Turkish advances in unmanned systems have provided a partial equalizer to Russian defense technological advantages, one that helps Ukrainian, Turkish, Azerbaijani, and other Russian neighbors to deter or blunt Russian military adventures, or at least the ability to support them from the sea.¹⁰⁵ A major naval buildup in recent years, led by indigenously produced ships and systems, has put the Turkish Navy on a more equal footing with Russia's Black Sea fleet.¹⁰⁶

Control of the straits favors Turkey in the Black Sea in a way that no other power can replicate. Montreux rights have been used well since the start of the war.¹⁰⁷ Kasapoglu put it this way:

After Ukraine destroyed a good portion of the Black Sea fleet without a real fleet of their own to speak of—unprecedented in modern warfare—the Russians were vulnerable because they could not augment from other fleets.

The damage was done not with frigates or submarines, but with ground-based missiles and unmanned systems. Russian concepts of A2/AD were used against them by Ukraine's coastal defense program; the beast is not immune to its own venom, and Montreux helped.¹⁰⁸

Turkey has yet to fully gain the upper hand over Russia in the Black Sea region. There is no freedom of navigation, though the Russians have been pushed off the coast of Ukraine. A narrow strip along the territorial seas of Romania and Bulgaria remains open, but the costs of insurance, and demining prohibit normal commerce. The Ukrainian ports of Kherson and Mykolaiv remain blocked—stranding several Turkish merchant ships in Kherson since February 2022. Turkey has not troubled Russia over the Shukru Okan incident, in which Russian forces forcibly boarded and inspected a small Turkish ship.¹⁰⁹

Deepening cooperation within the OTS provides Ankara additional diplomatic and economic partners with a common view of the region as a secure, stable, and prosperous stretch of the Middle Corridor, an east-west economic project free from Russian (or Iranian) control.¹¹⁰ Economic partnerships can complement Turkish hard-power deterrence in the region through development projects that benefit Russia as well as other littoral and regional states. The Turkish-brokered grain deal of 2023 provides an example of such thinking: by negotiating terms for the sale of Ukrainian and Russian grain, Ankara was, for a time, able to help both countries, as well as grain consumers further afield.¹¹¹ The deal had numerous shortcomings, but demonstrated Turkey's diplomatic agility—the ability to convene both conflict parties and generate creative, economically-oriented approaches to de-escalation.¹¹²

Obstacles and challenges: Russia, littoral sensitivity, and intra-NATO trust deficit

Despite Turkey's great potential for strengthening the defense of Ukraine, bolstering NATO deterrence, and stabilizing the region, three key dynamics limit the room for convergence with Ankara's Western partners:

1. Risk aversion in Ankara regarding Moscow.
2. Skepticism and sensitivity regarding greater NATO presence in the Black Sea region, and actions by some Western powers to limit Turkish aid to Ukraine, even though Turkey is one NATO member that Putin knows can and will hit back effectively—a legacy of conflicts in Syria, Libya, and the Caucasus.¹¹³
3. Possession of the means and will to inflict pain on Russia, which may create a mutual interdependence with costs that deter conflict.¹¹⁴

This brutal agreement or mutual deterrence epitomizes Ankara's Eurasian strategy of balancing against Russia with NATO, Black Sea neighbors Ukraine and Georgia, and the OTS, while assuring Russia that such balancing is not a prelude to open antagonism. This enigmatic relationship inclines Turkish strategy more toward

deterrence and diplomatic overtures than mutual economic injury with the Russians.

This strategy comports with US interests in limiting Russian aggression, despite the difference in method.¹¹⁵ Erdoğan has made it clear that Turkey can and will push back against Russia over a broad geographical range, but prefers to do so cautiously and patiently in the region. The rough symmetry that underwrites this arrangement would be upset were Ukraine to lose access to the sea.¹¹⁶

The Russians understand that Turkish regional hedging not only limits their reach, but also militates against perceived Western threats and intrusions in or near the Black Sea.¹¹⁷ This exemplifies the Turkish tradition of balancing Russia against the West to ensure autonomy from both, as noted in the opening of the chapter.¹¹⁸ Complex interdependence with Russia conveys mutual leverage, meaning that both sides have reason to reach mutually acceptable stability in the Black Sea region; it may be the only significant nonzero-sum factor in the current regional security equation, and therefore a unique advantage for postconflict arrangements.¹¹⁹

Western security analysts have argued that securing NATO's southern flank and the Black Sea region more generally requires a more robust military presence in Romania, Bulgaria, and on the Black Sea.¹²⁰ The latter proposition runs headlong into Turkey's "blue homeland" doctrine, which dictates that Turkey assert primacy in its near waters with the same vigor it affords ground territory and airspace. In the case of the Black Sea, this can be read as: NATO does not own the Black Sea, nor will Russia.¹²¹ Western pressure for greater access for nonlittoral navies is viewed by Ankara as escalatory and unnecessary.¹²² Turkey's experience with Western interventions on its southern borders (e.g., Iraq, Syria) has not been positive, and they are anxious not to turn the Black Sea region into the Middle East.¹²³

If Ankara will brook no external lead for Black Sea security, is it willing and able to take on the role? There are positive signs. One came earlier this year when a Turkish F-16 flying from a Romanian airbase went to investigate possible debris on Romanian territory after a Russian drone attack near Ukraine's border with Romania.¹²⁴ Bulgaria has signed a new agreement with Turkey to allow similar flights.¹²⁵ Another example is Turkish contribution to the Very High Readiness Joint Task Force, a brigade-sized force created in 2014 to bolster NATO's deterrence against conventional attack.¹²⁶

While Turkey's role in maritime security is often discussed, its role in the air domain is less examined. The US approval of F-16 modernization kits will make Turkey a stronger anchor on NATO's southern aerial flank. As US allies in and near the region, and Ukraine, expand the use of their F-16s, Turkey's decades of experience with the platform (including maintenance and production capabilities) will necessarily strengthen NATO's southern capabilities in the air.¹²⁷ Expanded air presence from NATO, expanded Ukrainian capability, and better intra-NATO air coordination will enable NATO to more effectively contest Russian air superiority, adding another layer of deterrence.

Kasapoglu believes NATO has smart options to strengthen its position in the region without major naval assets passing through the straits:

A logical alternative to pressing Montreux's limits is to provide everything and anything that relates to the three littoral states that are in NATO—resources, infrastructure, and authorities. A scenario in which Ankara was flexible enough on Montreux to allow US carriers or subs in? Even the most Atlanticist government in Turkey wouldn't do it. Then policy pillars for Turkey in the Black Sea were two: Montreux and regional ownership. The latter is in tatters now due to Russian actions. There is an opportunity for the West to make the case that Russia destroyed the second pillar—and that NATO must grow new capabilities in the south to ensure Russia doesn't end with the commanding position.¹²⁸

One part of the challenge, then, consists of NATO recognizing and working within Turkish sensitivities regarding the role of nonlittoral NATO states operating in the Black Sea region, and recognizing Turkey as the lead NATO power within it. Yet NATO working under Turkish lead there would require the rebuilding of mutual trust, which has been undermined by actions beyond the region over the past two decades. As Socor notes:

Working together in the Black Sea must begin outside of the Black Sea. The U.S. must meet Turkish concerns about the PKK [Kurdistan Workers' Party]—stop paying and arming the YPG [People's Protection Units affiliated with the Syrian Kurdish population] in Syria. There is a great deal of mistrust toward the U.S.—not just Erdoğan, but at a popular level. We must rebuild trust beginning with northern Syria. Turkey has interests beyond the Black Sea that require tranquility in the Black Sea: Libya, Somalia, elsewhere. This has led to a modus vivendi with Russia on terms favorable to Russia. To change that calculus, Syria is the starting point. The second step is the U.S. demonstrating that it can and will stand up to Russia, and shield Turkey, if necessary, from Russian retaliation. Ankara considers the Biden administration position on Russia—pusillanimity—when deciding how much risk to accept.¹²⁹

Lt. Gen. (retired) Ben Hodges, former commander of NATO Land Command in Izmir, Turkey, also sees a need to rebuild trust as part of an enhanced NATO presence in the Black Sea region:

The U.S. and other European nations should work hard to regain Turkey's trust, sort of a U.S.-Turkey 2.0. A clearly defined US strategy for the greater Black Sea region developed in coordination with Ankara and accounting for Turkish interests and concerns would go a long way to helping rebuild that trust. At the same time, the U.S. should look for ways to maximize its opportunities for naval presence within the parameters of the Montreux Convention. In past years, we used less than 50 percent of the available days in the Black Sea because of a lack of US Navy resources and because it was not a high enough priority.¹³⁰

Italian security analyst Maurizio Geri notes that rebuilding trust between Ankara and its Western allies regarding the Black Sea has significant strategic implications. They are crucial, he says, “not only for the U.S. and NATO but for Europe more broadly, in particular because Turkey connects Europe with Central Asia, through Turkey, Georgia, Azerbaijan—and in the future perhaps through European Russia.” NATO allies and the US government need to see and address “this long-term value in economic and geopolitical terms,” he adds.¹³¹

Yet the new US Black Sea strategy risks further eroding trust and repeating the mistakes of Syria and Iraq—by not making early strategic compromises with Turkey that will lead to support, rather than resistance, to Washington’s approach. The new, congressionally mandated, US strategy for the Black Sea appears not to have considered Turkish concerns in a substantive way. As the Atlantic Council’s Arnold Dupuy says:

Turkey was very much absent from the initial strategy that came out last year, and a slightly updated version in the 2024 National Defense Authorization Act—it was just listed as a regional state. There has to be a diplomatic effort with Turkey to work with them and not around them—Turkey has to play a key role, and there has to be a reassurance campaign. Yet formal strategy documents do not yet reflect such cooperation as an imperative.

In other words, he says, Washington cannot ignore the Black Sea country with the longest coastline, significant economic strength, and naval forces.¹³²

More Turkish hedging behavior is likely, according to Kasapoglu, if this NATO member is presented with a strategy without consultation with Ankara in its developmental stage. Without that, it is a “deal-breaker.” He points to what happened in Syria:

In Syria it hasn’t gotten everything it wanted, but assigned talismanic value to confounding deals made without its inclusion. We are talking about the biggest NATO player in the region, and with much overlap with the U.S. regarding a strong Ukraine. Building coastal defenses, strengthening Georgia, strengthening [the Ukrainian] defense industry: we overlap on all. Leaving the Turks out in the cold is replicating the Syrian mistake.¹³³

US strategy documents are not the only irritant inhibiting trust. Another is the effort of certain EU members (especially France, Greece, and Cyprus) to prevent EU funding for purchases of military aid for Ukraine from non-EU members.¹³⁴ The latter had the effect of slowing the provision of Turkish-made artillery shells to Kyiv, while the United States was finalizing a bilateral deal bringing Turkish artillery production lines to Texas to help meet both American and Ukrainian needs. When a coalition of European powers try to undercut Turkish power elsewhere, it is hard to see how Europe can leverage Turkish power to help stabilize the Black Sea region.

Conclusions and recommendations

Experts disagree on where the war in Ukraine is headed, but generally agree that in either best- or worst-case scenarios, Western interests in the Black Sea region will require closer consultation and collaboration with Turkey. In the best case, continued Western assistance would stabilize Ukrainian defenses, enabling Ukrainians to retake territory lost to the Russians in recent years, and catalyzing negotiations that would probably almost certainly involve a Turkish role as facilitator, observer, and guarantor. In the worst case, a Russian victory would imperil a rump Ukraine and other littoral states in a manner that would certainly require Turkish hard power to deter.

Recent positive movements in US-Turkish bilateral relations, including the F-16 deal and Sweden's NATO accession, augur a strategic reconvergence that could facilitate a more secure and NATO-friendly region. Increased US diplomatic traffic to Turkey—particularly by Secretary of State Antony Blinken and then-Under Secretary of State for Political Affairs Victoria Nuland (who retired in March)—created clearer channels for collaboration on Ukraine, Gaza, and other crisis areas.¹³⁵ The simultaneous presence of an effective, well-connected US ambassador in Ankara and successive effective, well-connected Turkish ambassadors in Washington, have created opportunities for new growth in business and defense relationships.¹³⁶

The United States and its European allies should seek to build on this positive trend with concrete steps specific to achieving a stable triangular security equation in the Black Sea region:

1. Support defense industrial complementarity between the NATO members and Turkey, as well as Ukraine and Turkey. Renewed F-16 sales and Turkish production of artillery shells in Texas are a small start to defense industrial production deals that will strengthen all three countries. As US defense assistance flows to Ukraine, some should go to Turkish-Ukrainian projects that will be sustainable once US funding flows decrease. Defense cooperation with Georgia and Azerbaijan—as well as economic support to the development of the Middle Corridor—should be pursued to strengthen the “Turkey and others” leg of the triangular equation. European allies should pursue more joint defense production with Turkish partners, and suspend or remove spending policies that limit common EU funding from non-EU producers of critical defense goods.
2. Strengthen the capabilities of littoral NATO states in the region (i.e., Romania, Bulgaria, and Turkey) for air defense, naval defense/anti-ship missiles, and ground defensive capabilities to raise the costs of further Russian adventurism to unsustainable levels.
3. Recognize the central role of Turkey in the region by consulting with its officials on US and NATO strategy during formulation, not after promulgation. Such consultations, as well as recognizing Turkey's lead in NATO operations in the Black Sea region, will help avoid triggering Ankara's hedging instincts.

Washington and Brussels must avoid the temptation to work around or over Ankara when planning and resourcing security for the region; they must work with and through, instead.

Turkey, working together with its network of littoral NATO allies and non-NATO regional partners, is in a position to strengthen multilateral deterrence of further Russian aggression in the region even while it engages Moscow economically and maintains positive diplomatic relations that can reduce Russian paranoia and create openings for de-escalation. Multilateral deterrence depends in turn upon Turkish conventional military power, both its large array of forces and its proven ability to train, equip, and coordinate with forces beyond its own borders. Washington can supplement this deterrent package through the steps listed above. Other actions taken outside the Black Sea region will also affect the quality of Turkish cooperation with Western partners in it, most critically cessation or continuation of support to the YPG in Syria. Whatever the course of the war in Ukraine, stability in the Black Sea region on terms favorable to the Alliance can only be envisaged in the context of convergence with its most potent regional ally.

Colonel (retired) Rich Outzen, PhD, is a geopolitical analyst and consultant currently serving private sector clients as Dragoman LLC. He served in the Department of State as both a military and civilian advisor from 2016 through 2021, working in the Policy Planning office and later the office of the Special Representative for Syria (SRS). He was a member of the National Defense University (NDU) and Institute for National Security Studies faculty from July 2013 through June 2016. He served as the U.S. Defense Attaché in Kabul, Afghanistan from 2014-2015, on temporary duty from NDU. He previously served as the Deputy Chief of Staff for Training and Development for the U.S. Security Coordinator in Jerusalem. He has researched and published extensively on matters of policy and strategy, with a focus on the greater Middle East and Central Asia. A U.S. Army Foreign Area Officer, he has served in a variety of staff, command, and policy support assignments in Washington, D.C. and overseas. He has helped shape interagency discussion and national policy options for transitions in Iraq, Afghanistan, Turkey, Israel, and the Palestinian Authority. His areas of expertise include Defense Policy and Strategy, Strategic Culture, the Middle East, NATO/Europe, and Central Asia.

Part 4.

Turkey's geopolitical role in the Black Sea and European energy security: From pipelines to liquefied natural gas

Eser Özdil

Strategic assessment

Since the Russian invasion of Ukraine, the European Union has undergone a profound transformation in its energy policy to reduce dependency on Russian natural gas. In this evolving policy landscape, Turkey has emerged as a key partner, strategically positioned to curb Russian commercial influence in Europe and the Black Sea region while maintaining its balancing act. In this vein, the European Union's (EU's) regulatory advancements, exemplified by the REPowerEU plan, the EU Toolbox, and the European Green Deal, have significantly reshaped energy procurement strategies, emphasizing diversification and security. Turkey's recent natural gas export agreements, primarily those with Moldova, Romania, Hungary, and Bulgaria, underline its critical role in enhancing European energy resiliency. Moreover, Turkey's robust liquefied natural gas (LNG) infrastructure and its potential for future projects fortify the energy security of both European nations and Black Sea littoral states.

Crucially, Turkey's nuanced balancing act in its foreign policy, encapsulated in its natural gas policy, deftly integrates price rationality with geopolitical strategy, enabling it to govern complex international dynamics effectively. Turkey's approach ensures flexibility in energy sourcing, thus reducing dependency on any single supplier while leveraging the country's geopolitical position to establish a resilient energy policy. This policy is characterized by agility and adaptability, responding swiftly to regional and global natural gas trade, and enabling Turkey to navigate the fast-changing dynamics in natural gas policymaking.

Last but not least, even with flexibility tools like LNG terminals and/or underground storage, high-level dependency in imports on a single supplier poses energy security risks. Since securing LNG and pipe gas quickly is not possible, creating a balanced import portfolio secures countries from short-term energy shocks, which may have destructive effects on market participants. As Turkey has also been developing nuclear projects with Russia, a delicate balance in its energy relations should be carefully maintained.

Preinvasion state of natural gas trade between Europe and Russia

Understanding the evolution of the European natural gas strategy provides important context for Turkey's ongoing ties with EU nations, especially given the direct implications

for EU gas supplies following Russia's invasion of Ukraine. Prior to Russia's invasion of Ukraine in February 2022, the EU relied heavily on Russian natural gas, representing 40 percent of imports,¹³⁷ or 150 billion cubic meters (bcm), in 2020.

With a total annual gas demand of approximately 400 bcm, the EU sourced only 10 percent domestically, and supported limited LNG infrastructure, before the war in Ukraine. In 2021, the EU imported 155 bcm of natural gas from Russia,¹³⁸ with the number dropping to 80 bcm in 2022,¹³⁹ and 43 bcm in 2023. As a percentage, the EU's reliance on Russian gas has decreased from 45 percent of total imports in 2021 to 15 percent in 2023. These radical policy measures, supported by technical and commercial actions, represent the EU's renewed strategy against reliance on Russian gas.

During this period, the EU initiated a strategic transition from pipeline gas to LNG,¹⁴⁰ with US LNG imports accounting for 44 percent in 2022 and 48 percent in 2023. Qatar, Algeria, and Nigeria have also become significant LNG suppliers, contributing 12.1 percent, 9.4 percent, and 5.6 percent, respectively. Despite a total reduction in pipeline gas imports, EU countries still received 17.8 bcm of LNG¹⁴¹ from Russia¹⁴² in 2023, representing 6.1 percent of total gas demand. In the infrastructural axis, the EU continues to sustain its ambitious investment plans for expanding LNG import capacity.

In line with the ongoing high investments in LNG infrastructure, the EU increased its LNG import capacity by 40 bcm in 2023, with plans to add another 30 bcm by 2024,¹⁴³ though this infrastructure is still under construction. The share of LNG in the EU's gas supply rose from 20 percent in 2021 to 41 percent in 2023, reflecting a radical diversification of energy sources in response to the conflict in Ukraine.

Importantly, while the EU continues to purchase Russian LNG via Novatek, the fourteenth sanction package,¹⁴⁴ which was established in June 2024, fully prohibits all forms of reexport agreements. This measure will prevent Russian LNG carriers from utilizing the EU's developed LNG infrastructure in the near future.

Finally, the majority of the EU's dependence on Russian gas was based on long-term natural gas pipelines. Notably, historical pipeline agreements, such as the Gazprom-Naftogaz deal, allowed Russian gas transit through Ukraine. This \$7 billion agreement¹⁴⁵ aimed to transit 225 bcm from 2020 to 2024. Post-invasion reductions led Naftogaz to seek international arbitration against Gazprom, and the collaboration will no longer exist after 2024.

Other widely discussed and criticized projects within the EU were Germany's Nord Stream pipelines, which have become inoperable. The Nord Stream 1 pipeline began operations in 2011, and the proposed Nord Stream 2 aimed to double the capacity to 110 bcm per year. German Chancellor Olaf Scholz initially supported Nord Stream 2, like his predecessor,¹⁴⁶ Angela Merkel, despite warnings from the United States, which argued that the project created a power asymmetry in favor of Russia. Despite significant technical discussions on this asymmetry within the transatlantic community, the project was halted only following the invasion. The damage to Nord Stream 2

and the cessation of Nord Stream 1 exposed vulnerabilities in Germany’s gas supply, prompting the EU to rapidly increase investments in LNG infrastructure.

The EU’s legislative actions to diminish reliance on Russian natural gas

In October 2021, the European Commission introduced a comprehensive “toolbox”¹⁴⁷ designed to help EU member states address rising energy prices and bolster energy supply security by reducing dependence on Russian natural gas. Key measures included enhancing gas storage efficiency, establishing a collective gas purchasing platform, and reassessing the EU’s electricity market with the support of the Agency for the Cooperation of Energy Regulators (ACER).

In April 2022, the EU launched the EU Energy Platform¹⁴⁸ to focus on demand aggregation, joint purchasing of non-Russian gas, efficient use of natural gas infrastructure, and extensive international outreach. This platform aims to mitigate intra-EU competition, diversify supply chains, and reduce reliance on Russian energy sources in a coordinated and multilateral manner.

Following Russia’s invasion of Ukraine in February 2022, European nations, particularly Germany, intensified efforts under the REPowerEU plan¹⁴⁹ to reduce dependence on Russian gas. Introduced in May 2022, REPowerEU aims to eliminate reliance on Russian fossil fuels by 2027 by emphasizing energy efficiency, transitioning to renewable energy sources, and diversifying natural gas imports. These policy measures include nationalizing Gazprom’s storage facilities to safeguard German national security.

In conjunction with the regulatory restrictions on Russian facilities, the EU updated the Renewable Energy Directive,¹⁵⁰ setting a 45 percent renewable energy target by 2030. The European Commission’s classification of natural gas as “green”¹⁵¹ facilitated the expansion of LNG import capacity, aligning with REPowerEU’s objectives for non-Russian gas procurement. Clearly, the EU has implemented a comprehensive and systematic policy program that combines the EU Toolbox with the REPowerEU plan.

Evolution of Germany’s natural gas tactics

Reflecting current geopolitical power shifts and energy security concerns within the EU, there exists a concerted multilateral effort and intergovernmental approach to reducing Europe’s reliance on Russian natural gas through a variety of measures. Nevertheless, Germany’s energy policy has notably differed from those of other European nations—reflecting a unique relationship with Russia over time and overlooking the importance of energy diversification in favor of strategic use of materials, primarily pipelines, in its natural gas trade, initially with the USSR and subsequently with the Russian Federation.

By 1981, Germany’s natural gas trade with the USSR had reached 17.2 bcm,¹⁵² without any substantial local technical improvements. Another critical twenty-five-year contract in 1981 established an annual export of 10.5 bcm.¹⁵³ After the Berlin Wall

fell and Germany reunified, the USSR began supplying about 30 percent of West Germany's natural gas needs. By 1990, Soviet gas exports to Western Europe had grown drastically to 63 bcm.¹⁵⁴

During this period, Germany faced two significant political-economic challenges in its dealings with Russia. First, the USSR engaged in barter trade, exchanging natural gas for steel pipes, pipe-laying equipment, and other related infrastructure materials with Germany via its companies. Second, Germany leveraged its robust domestic iron and steel sectors to secure cheap Russian natural gas, which it then sold to its European allies.

This approach greatly expanded Germany's economic reach and indirectly subsidized gas prices for other European countries by maintaining dependence on Russia as the primary natural gas source. A similar mindset prevailed in many Germany-Russia natural gas projects—until Russia's invasion of Ukraine, which prompted a significant shift.

End of an era: Russia's 2022 invasion cuts historic gas bonds with Germany

Germany's reliance on Russian natural gas, a legacy of the USSR-era pipe-for-gas agreements,¹⁵⁵ conflicts with the essential principle of energy diversification. It is best exemplified by its pre-invasion support for Nord Stream 1 and 2, which represented a total capacity of 110 bcm yearly and would have made Germany unilaterally dependent on Russian gas as a single source, without alternative investments such as LNG infrastructure and gas storage. Germany's reassessment led to the implementation of the EU Toolbox and REPowerEU, which are aligned with the Green Deal's targets and green economic model.

In reaction to escalating energy security concerns, Germany has accelerated its diversification efforts by investing in LNG infrastructure, notably acquiring four floating LNG storage and liquefaction facilities. In aggregate, Europe's LNG investment is poised for considerable expansion. Currently, there are thirty-seven operational import terminals:¹⁵⁶ eight newly commissioned, four expanded in 2022 and 2023, thirteen new terminal projects under construction, and four existing facilities with planned expansions.

Turkey and Germany: Contrasting approaches to natural gas

Within the transatlantic community, Turkey, much like Germany, has faced criticism for its reliance on Russia. Nonetheless, Turkey and Germany, as NATO allies, exhibit starkly divergent strategies in their approaches to natural gas procurement and energy security. Reflecting Turkey's balancing act in its natural gas policy, Ankara has historically pursued a multidimensional foreign policy that is sensitive to price fluctuations and geopolitical shifts from the Black Sea to Europe.

This approach began in earnest in 1986 under then-President Turgut Özal, whose neoliberal vision led to market-driven strategies that reshaped Turkey's natural gas trade mindset. A decisive point was reached in 1987, when the state-owned BOTAS

Petroleum Pipeline Corporation initiated its first gas imports¹⁵⁷ from the USSR, marking the start of Turkey's strategy to procure natural gas internationally. This was followed in 1988 by the beginning of LNG purchases from Algeria,¹⁵⁸ diversifying further in 1995 with a long-term LNG contract with Nigeria at Marmara Ereğlisi, Turkey's first LNG terminal.¹⁵⁹ The deal with Nigeria is widely believed to have been insurance in case of Russian gas cuts.

Turkey's natural gas procurement history contrasts strongly with Germany's energy policy, which has been centered on Russian natural gas and offered limited alternatives like LNG infrastructure. Germany's dependence was highlighted during Russia's irredentist moves in Georgia in 2008 and Crimea in 2014, and lastly, Russia's invasion of Ukraine, delineating the vulnerabilities inherent in this reliance. Germany's turning point came quite late, in 2022, when it implemented the EU Toolbox, REPowerEU, and the Green Deal to diversify its energy sources and develop LNG capabilities.

Amid the varied landscape of energy strategies, it is essential to underscore that Turkey distinctly avoided the trade of strategic equipment, such as Germany's pipe-for-gas strategy, which set the stage for advancing Russian influence in Europe through its pipelines and storage facilities. For more than fifty years, Turkey's multidimensional approach has been a cornerstone of state policy, beginning with engagement with international markets in the 1980s. This strategy effectively melds considerations of price rationality and ongoing geopolitical risk assessment, integrating them in the foreign-policymaking process through a meticulously managed balancing act. (See Part 1 for more on diplomacy and dialogue.)

In line with this balancing act, Turkey expanded its LNG import capabilities and infrastructure, demonstrating a proactive and versatile approach that has been adaptable to price volatility since the first day of its natural gas procurement. This multidimensional strategy has always ensured flexibility and security in its energy supply and underlined Turkey's aim of diversifying its energy sources without becoming dependent on fixed infrastructural ties, the dangers of which can be seen in Germany's delayed response to diversifying away from Russian natural gas infrastructure.

Turkey's policy and interests in the Black Sea region

From the 1980s to the 2020s, Turkey's natural gas policy has consistently involved incorporating delicate balancing acts into its contracts with other nations. Between 2010 and 2023, under the leadership of Hakan Fidan at the National Intelligence Organization (Milli İstihbarat Teşkilatı; MIT), Turkey demonstrably enhanced the technical capabilities¹⁶⁰ of its foreign operations within the security sector, making the security bureaucracy one of the key decision-makers of foreign policy. In June 2023, Fidan was named minister of foreign affairs.

Fidan's vision for Turkish foreign policy is informed by the concept of complex adaptive systems, leading him to move away from traditional definitions¹⁶¹ of international systems, whether unipolar, bipolar, or multipolar. He views the international system's



Saipem's pipelay vessel Castorone sails in the Bosphorus on its way to the Black Sea, in Istanbul, Turkey July 5, 2022. REUTERS/Yoruk Isik

complexity as a call for agile policymaking, a strategy that echoes Özal's nuanced approach. Notably, Özal advanced Turkey's strategic interests by securing pipeline gas agreements with the USSR while diversifying energy sources (e.g., LNG imports, Marmara Ereğli terminal). Fidan, too, combines in-depth geopolitical analysis with a systematic decision-making process, skillfully addressing both economic and security challenges.

Prompted by geopolitical tensions originating in Syria after Turkey downed an SU-24 type Russian jet in 2015,¹⁶² a critical reassessment of the nation's substantial reliance on Russian gas, which had previously constituted over 50 percent of its total gas imports, became a focal point of Turkish foreign policy.

This strategic reconsideration sparked a vigorous public and governmental debate, which in turn accelerated significant investments in Turkey's LNG import infrastructure. In this vein, the transmission capacity of Turkey's natural gas networks has expanded, with current daily gas entry capacity exceeding four hundred thousand cubic meters (mcm) daily. Turkey is actively working to increase its natural gas storage capacity to at least 20 percent of its annual consumption.

Significant steps in this direction include the deployment of three floating storage regasification units (FSRUs) and upgrades to the total capacities at LNG terminals, now totaling approximately 156 mcm per day. These developments are also in line with the goals set forth by Turkey's Ministry of Energy, led by Alparslan Bayraktar, following the election last year,¹⁶³ to further secure the nation's energy supply and diversify its sources, ultimately aiming to elevate total capacity to over 500 mcm per day from 2023 onwards.¹⁶⁴

Since 2015, Turkey has decisively shifted away from an overdependence on Russian gas. Nonetheless, the implications of Turkey's balancing act in natural gas contracts

may vary in response to price fluctuations and geopolitical assessments, as can be observed in the comparative supply strategies between 2020-21 and 2021-23.

Rising through the ranks of LNG importers in Europe (2020-21)

Turkey's development of its LNG infrastructure facilitates the implementation of its balancing act in natural gas contracts, enabling it to sign LNG contracts along with pipelines. For instance, during the COVID-19 pandemic between 2020 and 2021, Turkey's approach to securing its natural gas needs via LNG contracts was notably a consequence of its traditional policy of price rationality. In accordance with that policy, Turkey positioned itself as the fourth-largest LNG importer in Europe with an increase of 1.3 million metric tons in 2020.¹⁶⁵

This positioning entailed a shift toward spot market purchases rather than long-term commitments, as global gas prices plummeted due to decreased demand on production cycles. During that time of pandemic lockdowns, Turkey capitalized on these lower prices to enhance its energy security without binding itself to long-term agreements. The flexibility of relying on spot market LNG allowed Turkey to manage its energy costs effectively during a period of high economic and global uncertainty.

Adapting to market shifts brought piped gas to the fore (2021-23)

From 2021 to 2023, Turkey shifted its natural gas procurement strategy, increasingly favoring contracts through pipelines with suppliers like Russia, Iran, and Azerbaijan. In 2022, the total volume of natural gas imports to Turkey reached 54.66 bcm, with a substantial 72.25 percent being transported via pipelines.¹⁶⁶ This reflects a strong preference for pipeline-based deliveries over LNG, which accounted for only 27.75 percent of imported natural gas.

By 2023, this preference was evident as Russia became Turkey's predominant energy supplier, providing 59.14 percent¹⁶⁷ of its energy imports by October, according to data from the Energy Market Regulatory Authority (Enerji Piyasası Düzenleme Kurumu; EPDK). The shift in a very short period from LNG to pipeline contracts was a clear demonstration of Turkey's balancing act in a multidimensional era, addressing the complexity of economic and security challenges. It also showcased Turkey's agile approach to the consistently changing international system. This shift was driven by a combination of factors, including energy market price stabilization, increased demand in the LNG sector, and a gradual increase in natural gas prices.

Examining the nuances of Turkey's current energy policy

To fully understand the implications of Turkey's balancing act in natural gas procurement, it is essential to examine the broader context and current dynamics of the Turkish natural gas and energy market. Turkey's energy policy has undergone a significant evolution across two distinct phases, as defined by Bayraktar,¹⁶⁸ each designed to effectively respond to both global shifts and domestic needs.

Energy transition 1.0: Liberalization and privatization (2002-17)

The initial phase began with the ascent of the Justice and Development Party (Adalet ve Kalkınma Partisi) to power in 2002, focusing on liberalizing and privatizing the energy sector. This era ushered in over \$60 billion in investments, dismantled monopolistic structures, and cultivated a more transparent and competitive market, thereby enhancing innovation and efficiency.

Energy transition 2.0: Localization, improvement, market predictability (2017-23)

This second phase prioritized enhancing the security of supply, localization, and market predictability. During this period, Turkey significantly expanded its LNG capabilities, incorporated new infrastructure such as FSRUs, and made a major natural gas discovery in the Sakarya gas field, all of which substantially strengthened domestic resources and supply security. Despite these advancements, challenges persisted, notably the continued dominance of state-owned BOTAS in the natural gas sector, which impacted market liquidity and predictability.

Energy transition 3.0: Decarbonization, decentralization, digitalization, and diversity (2023-35)

Currently, under the continual impacts of global regulations on energy markets, some industry experts, including myself, argue¹⁶⁹ that Turkey is in the midst of a third phase, dubbed the smart energy transition, which emphasizes decarbonization, decentralization, digitalization, and diversity (the 4Ds).

This phase aims to ensure secure energy supplies, diversify the energy mix, and position Turkey as a central energy hub between Asia and Europe. A significant objective within this framework is the development of green and blue hydrogen technologies, with a target of achieving five gigawatts (GW) of electrolyzer capacity by 2035, highlighting Turkey's commitment to renewable and sustainable energy solutions.

Understanding the nuances of each transition era in Turkey's energy policy is crucial to grasping the strategic shifts made as part of its balancing act and how they have shaped its current energy landscape. As Turkey continues to evolve its energy strategy, appreciating these nuances will be key to achieving a resilient and diversified energy future.

Potential areas of Turkish-European cooperation

Turkey and the EU are on the cusp of developing a deeply interconnected partnership, centered around natural gas and renewable energy sources, and set against a backdrop of shifting regional powers in the international arena. Despite the negative political climate¹⁷⁰ that has persisted between the EU and Turkey for almost ten years, their commercial relations continue to strengthen, exemplifying a new model of bilateral governance marked by transactionalism.

Within this governance framework, Turkey's strategic position as a NATO member

enhances its role as a critical energy conduit between East and West, providing a unique opportunity to develop energy cooperation that could significantly impact energy security and economic interdependence throughout Europe.

Meanwhile, as Russia redirects its natural gas exports to new markets like China, India, Pakistan, Azerbaijan, and Turkmenistan, in response to strained relations with European nations, Turkey continues to maintain strong natural gas trade links with both Russia and the EU.

Despite Russia's attempts to overtake Turkey's cultural and political ties with Azerbaijan and Turkmenistan to establish alternative gas routes, the robustness of Turkey's trade relationships emphasizes its key role in the global energy market.

In this geopolitical setting, this intricate chessboard showcases Turkey's balancing act, as it incrementally challenges Russian market dominance in Europe by negotiating lower gas prices, while serving as a crucial conduit for transporting piped gas through both the Trans-Anatolian Natural Gas Pipeline (TANAP) and the Trans Adriatic Pipeline (TAP), which are carrying only Azerbaijani gas being produced in Shah Deniz field and non-Russian LNG to Europe through non-Russian agreements.

At this juncture, Turkey's delicate balance between these dynamics not only demonstrates its capacity for multidimensional governance, but also has the potential to diminish Russia's influence in global markets over the long term as a unique member of the Alliance.

Integrating Black Sea and European energy security: Turkey's strategic influence

Turkey's energy policy, including leveraging natural gas and renewables, holds strategic importance. Establishing a Turkey-EU natural gas trade axis could diminish Russian influence/control¹⁷¹ over Eastern and Central Europe while improving and formalizing relations with the EU, potentially opening doors to cooperative ventures in renewable energy. At this point, opening an energy chapter for official negotiations on EU accession will help both sides further harmonize energy regulatory frameworks as well as energy policies. Focusing on enhancing stability in the broader Black Sea region through natural gas, Turkey (via BOTAS) has secured significant natural gas export agreements since 2022 with several Eastern and Central European countries including Moldova, Romania, Hungary, Bulgaria, and potentially Greece through the Bulgarian agreement.

Building on this strategy, BOTAS aimed to secure new natural gas export agreements by leveraging its infrastructure investments, advanced transmission system, geographical location, and robust infrastructure to meet the natural gas demand of Eastern and Central Europe. As part of this strategy, BOTAS and Moldova's East Gas Energy Trading agreed to export two million cubic meters¹⁷² of natural gas daily to Moldova starting in September 2023. This translates to approximately 0.73 bcm annually, or about 25 percent of Moldova's annual natural gas¹⁷³ consumption.

Similarly, Turkey's strategy to secure Central European energy and increase Romania's energy resiliency against Russian influence resulted in another export deal with Romania in October 2023. This agreement permits the supply of up to four million cubic meters¹⁷⁴ of natural gas per day, and will expire in March 2025. Under this deal, Turkey contributes approximately 1.46 bcm annually to Romania, constituting about 12 percent of Romania's annual natural gas consumption.

On the other hand, BOTAS and Hungarian state-owned energy company MVM signed¹⁷⁵ another crucial natural gas export deal in August 2023, marking Turkey's first nonbordering recipient of natural gas exports. Even though portions are small, it is a remarkable event in terms of Hungary's efforts to diversify gas import sources.

The most significant agreement to boost Turkey's commercial influence in the Black Sea regional energy markets is with Bulgaria. In January 2023, Turkey and Bulgaria, via Bulgargaz, sealed a comprehensive thirteen-year agreement enabling the annual transmission of up to 1.5 bcm.¹⁷⁶ This deal, which supplied approximately 50 percent of Bulgaria's natural gas consumption¹⁷⁷ in 2023, also grants Bulgargaz access to this capacity at Turkish LNG terminals, notably the new FSRU Saros terminal, with the gas transported through Turkey's network to the Turkish-Bulgarian border.

Turkey's economic collaborations with European countries, particularly the littoral nations of the Black Sea like Bulgaria and Romania, underline the establishment of a strategic cooperation to curb Russian commercial influence. This cooperation model could even pave the way for the reactivation of the Trans-Balkan Pipeline (TBP) with a reverse gas flow, further entrenching the alliance in a complex interdependent manner.

In this context, as a policy option, the reverse flow of the TBP—which would allow gas to move from the south to the north, bypassing Russia—could be utilized to strengthen cooperation through pipelines. This would require technical modifications, such as installing bidirectional compressors, an area where Turkey has the necessary expertise and infrastructure knowledge. This policy option would reduce the geopolitical leverage of a single supplier, like Russia, over transit countries. For instance, Turkey could leverage this capability to act as a gas hub, redistributing gas from its LNG terminals or Azerbaijani and/or Turkmen supplies to Europe, further enhancing the region's energy flexibility and security.

Turkey's LNG terminals, including the Etki FSRU (28 mcm/day), Marmara Ereğlisi LNG terminal (35 mcm/day), Egegaz LNG terminal (40 mcm/day), Dörtyol FSRU (28 mcm/day), and Saros FSRU (25 mcm/day), collectively contribute to a capacity of 156 mcm/day.¹⁷⁸ This extensive capacity, coupled with Turkey's idle capacity of approximately 15 bcm, positions it to supply LNG to Slovenia, Hungary, and Bosnia and Herzegovina effectively. This is a window of opportunity for Turkey's advanced LNG infrastructure to play a crucial role.

Conclusions and energy policy recommendations

Turkey plays—and will continue to play—a crucial role in supporting the energy security of Central, Eastern, and Southeastern European countries. This strategic contribution not only enhances these countries' energy resiliency against Russia's commercial influence, but also strengthens a more stable Black Sea region as Turkey, the transit country, emerges as NATO's second-largest army. Turkey's recent gas export agreements with Moldova, Romania, Hungary, and Bulgaria underline its commitment and capacity to act as a key energy supplier and gas hub in the region.

Recommendations

- 1) Increase the capacity of TAP/TANAP:** Turkey's transportation of non-Russian gas contracts to Europe aligns with Europe's 2027 targets. To support this alignment, efforts should be made to increase the pipeline capacity of TANAP and TAP. This involves raising the current capacity from 16 bcm to 31 bcm to facilitate the transportation of non-Russian gas to Europe via Turkey, thereby enhancing the continent's energy security and reducing reliance on Russian gas.
- 2) Expand Black Sea energy cooperation:** Turkey could further broaden its natural gas export agreements and strategic partnerships with Eastern and Central European countries in the Black Sea region, thereby diminishing Russian influence and solidifying its role as an energy hub in the European energy markets.
- 3) Maximize production from the Sakarya gas field:** Turkey's first deepwater gas field discovery is expected to significantly increase its production capacity from 3.5 bcm to 14 bcm in its second phase. This field should be developed as a key resource for supplying natural gas to Eastern and Central European countries, contributing to regional energy diversification and security.
- 4) Enable renewal of the Turkey-Greece interconnector:** In 2023, Greece's total natural gas consumption was 6.38 bcm. The Turkey-Greece interconnector, which transported 0.75 bcm, accounted for approximately 11.75 percent of Greece's total consumption. To ensure continued support and normalization of energy relations, the Turkey-Greece interconnector agreement should be renewed.
- 5) Enable reverse flow of Trans-Balkan Pipeline for regional security:** Prioritize completing the technical modifications of this pipeline to enable reverse flow capabilities, facilitating the transport of natural gas from the south to the north and enhancing regional energy security.
- 6) Secure Central Europe via Turkish LNG:** Given Turkey's advanced LNG infrastructure and significant idle capacity, there is an opportunity to enhance energy supply diversification for Central European countries such as Slovenia, Hungary, and Bosnia and Herzegovina.
- 7) Integrate small modular reactors to diversify Turkey's nuclear energy security supply:** To ensure energy security and reduce dependency on Russian nuclear

power, Turkey should urgently prioritize integrating small modular reactors into its nuclear energy supplies, targeting an additional minimum 5 GW capacity.

8) Enhance investments in renewable energy in alignment with the EU's Green Deal:

Joint ventures between Turkey and the EU in renewable energy projects, including wind, solar, and green hydrogen, will diversify both regions' energy mixes and significantly reduce carbon emissions. This strategy aligns with the EU's Green Deal, which aims to achieve at least 45 percent of energy from renewable sources by 2030, while reducing dependence on Russian gas.

9) Use Turkey's strategic position to create new natural gas commercialization routes:

To enhance regional energy security and support the EU's REPowerEU plan, Turkey should capitalize on its geopolitical position by developing and commercializing natural gas routes from Turkmenistan, northern Iraq, and the eastern Mediterranean. This diversification would reduce dependence on Russian gas, for both Turkey and Europe, and foster both regional stability and economic integration.

10) Strengthen collaboration between Turkey's EPDK and the EU's ACER:

To enhance regulatory frameworks and operational efficiency in energy markets, EPDK and ACER should bolster their ongoing cooperation by focusing on joint technical workshops, personnel exchange programs, collaborative research projects, and capacity-building initiatives, thereby supporting energy market integration, security, and the adoption of renewable technologies in alignment with the EU's Green Deal and Turkey's energy transition goals.

Eser Özdil today bases his expertise on one and half decades of business experience. As part of his professional portfolio, Mr. Özdil is responsible of management GLOCAL Consulting, Investment & Trade, where he is competently advising top energy companies on public policy, government relations and commercial diplomacy, commercial due diligence, strategy and business development, mergers & acquisitions, investment and trade. Between 2012 and 2020, Mr. Özdil worked as Secretary General at Petroleum and Natural Gas Platform Association (PETFORM) based in Ankara, Turkey. Prior to PETFORM, he worked at various regional associations and think-tanks. Prior to PETFORM, he worked at various regional associations and think-tanks. Mr. Özdil participated in various official meetings of international organizations, namely Union for the Mediterranean (UfM), European Union, World Bank, OECD, IEA, EFET, and IGU. Özdil recently joined IVLP (International Visitor Leadership Program), the global public diplomacy program run by the U.S. Department of State. He is also a member of the BMW Foundation Responsible Leaders Network and Non-Resident Fellow of Atlantic Council.

Main takeaways and policy recommendations

Yevgeniya Gaber

Russia's full-scale invasion of Ukraine in 2022 has challenged Turkey's long-term strategy of multilateral diplomacy and regional ownership in the Black Sea. However, it has also created new opportunities for Ankara by highlighting the growing importance of the region—and Turkey as its key player—to the broader West.

The war in Ukraine has also marked a turning point in Ankara's relations with the EU and NATO, as it can either act as a catalyst to bring Turkey back into the fold of the European politics or accelerate its alienation from the West and push Ankara even closer to Russia. To achieve the former and avoid the latter, it is important that Ankara's Western partners recognize Turkey's leading role in regional security and adopt a more inclusive approach that involves Turkey in shaping their policies toward the Black Sea region.

On the other hand, Turkey should acknowledge the benefits of such cooperation and constructively engage with the United States and EU to defend the rules-based order both regionally and globally. Whereas a significant departure from Turkey's current stance is unlikely, a shift in approach is possible—especially in the Black Sea region, where the Turkish-Western policy convergence has grown since the invasion of Ukraine.

These policy recommendations represent a summary of key insights of the report as a whole, which includes four independent analyses covering political dialogue, defense cooperation, maritime security, and energy. For a more detailed examination of the authors' individual conclusions, please refer to the respective chapters.

Political and diplomatic dialogue

Recommendations for Western partners

1. Recognize Turkey's aspiration to play a pivotal role in the Black Sea region. Leverage Turkey's political and diplomatic clout in the region for mutual benefit.
2. Engage Turkey in consultations to ensure better aligned and coordinated policies toward the Black Sea region.
3. Harness Turkey's mediation potential in Russia's war on Ukraine.
4. Support Turkey's interest in normalizing relations with Armenia, facilitating a peace agreement between Armenia and Azerbaijan, and promoting stability in the South Caucasus through connectivity projects.
5. Identify ways to reduce Ankara's dependence on Russia by providing feasible alternatives through cooperation with the West.
6. Work together to bolster NATO's defense and deterrence capabilities in the Black Sea
7. Address grievances regarding the lack of recognition by its Western partners of Turkey's security concerns in and beyond the Black Sea region.

Recommendations for Turkey

1. Recognize that strategic autonomy must involve reducing Turkey's dependence on Russia and address societal, economic, and security vulnerabilities that Russia exploits.
2. Use the current security crisis in the region as an opportunity to reaffirm Turkey's central security role in the Alliance, particularly in deterring Russian aggression in the Black Sea and on NATO's eastern flank.
3. Step up efforts to close the loopholes that allow Russia to circumvent Western sanctions, including the reexport of dual-use goods and technology to Russia, which has been in direct conflict with Turkey's own interests as well as US and EU policies.
4. Counter Russia's influence operations in Turkey, which serve to amplify anti-Western narratives.
5. Support multilateral projects aimed at enhancing Ukraine's military capabilities, as well as recovery and reconstruction efforts, both bilaterally and in cooperation with the West.
6. Establish new cooperation models in the Black Sea region that complement NATO activities and involve Bulgaria and Romania, with the possibility of including Ukraine, Georgia, and Moldova.
7. Foster a more cooperative culture of engagement with Western partners. Work to renew a regular and structured foreign and security policy dialogue with the EU and achieve a broader normalization of relations with the United States.



Turkish Defence Minister Yasar Guler, his Romanian counterpart Angel Tîlvar and Bulgaria's Deputy Defence Minister Atanas Zapryanov attend a signing ceremony of a memorandum of understanding on establishing a mine countermeasures naval group in the Black Sea, in Istanbul, Turkey, January 11, 2024. REUTERS/Umit Bektas

Maritime security

Recommendations for Western partners

1. Reaffirm adherence to the Montreux Convention, as the tendency to question its relevance contributes to Turkey's concerns about the destabilizing consequences of broader US involvement in the Black Sea region.
2. Commit to support the Mine Countermeasures Black Sea Task Group.
3. Provide air control over the western Black Sea to reinforce Turkey's naval posture vis-à-vis Russia and facilitate uninterrupted functioning of sea lanes of communication.
4. Consider Turkey's security concerns and sensitivities while developing a new EU Black Sea Strategy.

Recommendations for Turkey

1. Leverage the potential of the Mine Countermeasures Black Sea Task Group to enhance Turkey's relevance in regional maritime security and reaffirm its credentials as a primary maritime security provider.
2. Support allied and partner countries (e.g., Bulgaria, Romania, and Ukraine) in upgrading their naval capabilities and developing maritime security action plans.
3. Enhance shipbuilding cooperation (in particular, Ada-class corvettes) with littoral states. This would contribute to closer maritime cooperation and interoperability among Turkey, Bulgaria, Romania, and Ukraine.

Defense cooperation

Recommendations for Western partners

4. Support defense industrial complementarity between other NATO members and Turkey, as well as between Ukraine and Turkey. Build on the positive trends that have emerged with the resumption of the F-16 deal and US-Turkish cooperation in production of artillery shells.
5. Allocate part of US defense assistance to Ukraine to finance Turkish-Ukrainian projects.
6. Pursue defense cooperation and joint defense production with Turkish partners—Georgia and Azerbaijan—as well as economic support to the development of the Middle Corridor.
7. Suspend or eliminate spending policies that limit joint EU funding of non-EU producers of critical defense goods.
8. Strengthen the capabilities of littoral NATO states in the region for air defense, naval defense/anti-ship missiles, and ground defensive capabilities to raise the costs of Russian revisionism to unsustainable levels.
9. Avoid the temptation to work around Ankara when planning and resourcing security for the region. Instead, consult with Turkish officials during formulation of policies. Recognize Turkey's lead in NATO operations in the Black Sea region.
10. Turkey's security concerns in a wider region—most critically, US support to the People's Protection Units (YPG) in Syria, which Turkey considers a branch of the terrorist organization Kurdistan Workers Party (PKK).

Recommendations for Turkey

1. Work together with the network of littoral NATO allies and non-NATO regional partners to strengthen multilateral deterrence of further Russian aggression in the region.
2. Take advantage of diplomatic channels of communication with Russia to create openings for de-escalation and mediation between Russia and Ukraine, when conditions are ripe.
3. Leverage Turkish conventional military power and its proven ability to train, equip, and coordinate with forces beyond its own borders to reinforce NATO's defense and deterrence posture in the region.

Energy cooperation

Recommendations for Western partners

1. Increase the capacity of TAP/TANAP from 16 bcm to 31 bcm to facilitate the transportation of non-Russian gas to Europe via Turkey, thereby enhancing the continent's energy security and reducing reliance on Russian gas.
2. Enable renewal of the Turkey-Greece interconnector to ensure continued support and normalization of energy relations.
3. Complete the technical modifications of the Trans-Balkan Pipeline to enable its reverse-flow capabilities, facilitating the transport of natural gas from the south to the north.
4. Enhance LNG supplies for Central European countries such as Slovenia, Hungary, and Bosnia and Herzegovina, using Turkish LNG infrastructure.
5. Strengthen collaboration between the European Agency for the Cooperation of Energy Regulators and Turkey's Energy Market Regulatory Authority to enhance regulatory frameworks and operational efficiency in energy markets. Conduct joint workshops, personnel-exchange programs, research projects, and capacity-building initiatives.

Recommendations for Turkey

1. Expand Black Sea energy cooperation and broaden Turkish natural gas export agreements with Eastern and Central European countries in the Black Sea region, thereby diminishing Russian influence and solidifying Turkey's role as an energy hub.
2. Maximize production from the Sakarya gas field to increase natural gas supplies to Eastern and Central European countries.
3. Prioritize the integration of small modular reactors in the Turkish energy system, targeting an additional 5 GW of capacity, to reduce dependence on Russian nuclear power.
4. Enhance investments in renewable energy projects in line with the European Union Green Deal, including wind, solar, and green hydrogen.
5. Use Turkey's strategic position to develop and commercialize new natural gas routes from Turkmenistan, northern Iraq, and the Eastern Mediterranean.

ENDNOTES

- 1 The Montreux Convention (1936) is an international agreement that grants Turkey the sovereign right to regulate maritime traffic through the Turkish Straits (Bosporus and Dardanelles). In times of peace, it guarantees freedom of passage for all civilian vessels and limits the number and tonnage of warships of non-littoral states, with specific provisions governing their mode of entry and duration of stay in the Black Sea.
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Atlantic Council
1030 15th Street, NW, 12th Floor,
Washington, DC 20005

(202) 463-7226
www.AtlanticCouncil.org