



CEPS POLICY BRIEF

KEEPING TURKEY IN THE FOLD

**How the West can engage
an ambitious middle power**

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SUMMARY

Turkey has become one of the most active middle powers navigating the erosion of the post-Cold War order. Positioned between a divided West and increasingly assertive Russia and China, Ankara seeks to turn its geographic position and diplomatic agility into leverage. While maintaining institutional ties to NATO and the EU, Turkey is cultivating pragmatic relations with revisionist powers and deepening its engagement with developing and emerging economies, positioning itself as both connector and powerbroker across Eurasia, the Middle East and Africa.

Economically, Turkey's fortunes remain tied to Europe, its largest trading and investment partner. Yet the government is diversifying towards Asia through the Asia Anew Initiative, Belt and Road cooperation and deepening partnerships with ASEAN and Muslim-majority states. This diversification offers resilience against external shocks but requires a clearer institutional framework to align new partnerships with existing obligations.

In the energy sphere, Turkey aims to become a regional hub connecting producers and consumers across multiple regions. Expanding renewables capacity and LNG imports has improved flexibility, yet dependence on discounted Russian oil and gas continues to constrain Ankara's manoeuvring room.

In defence and diplomacy, Turkey has leveraged its growing military industry and mediation efforts to enhance influence, from Ukraine to Libya and the South Caucasus, often engaging allies and adversaries simultaneously. These moves bolster its international profile but also generate friction within NATO and mistrust in Moscow.

Turkey's trajectory embodies both the opportunities and contradictions of middle power activism in a fragmenting global order. The challenge ahead is preserving economic and security diversification without eroding the Western anchor that remains central to its stability and global relevance. This Policy Brief outlines how the EU and the US can strengthen cooperation with Turkey through renewed economic integration, joint energy and defence initiatives, and pragmatic, confidence-building diplomacy, to ensure it remains anchored in the Western order while retaining its regional agency.



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INTRODUCTION

Turkey is among the most active of the world's middle powers seeking to navigate the crumbling of the post-Cold war international order. With the West locked in a seemingly intractable conflict with Russia and mounting trans-Atlantic rifts as the US attempts to rebalance its strategic posture to the Indo-Pacific, Turkey is seeking to exploit its position to enhance its own autonomy and reconfigure its strategic geography.

Even as it maintains longstanding institutional ties to the West, Turkey has also been cultivating mutually beneficial ties to revisionist powers China and (especially) Russia. It's also deepening its engagement with the 'Global South' while positioning itself as a mediator and power broker. This global hyperactivity has made Turkey an important power broker in the Middle East, Eurasia, Africa and potentially even Europe. It's also tempered Western criticism of democratic backsliding under President Erdoğan. The extent of these activities is particularly striking given Turkey's current economic fragility, including its vulnerability to speculative capital flows and continued dependence on Russian oil and gas.

Making sense of Turkey's shifting global role requires understanding both the nature of the changes taking place in the larger global system as well as how Erdoğan – who's firmly in control of Turkish foreign policy – seeks to navigate them. The 2008 global financial crisis marked a turning point, prompting widespread scepticism towards Western economic prescriptions and political models. Though he lacks the strategic romanticism of his onetime foreign minister and rival Ahmet Davutoğlu, Erdoğan still suffers from a form of [Ottoman nostalgia](#) that shapes his worldview.

Turkey is in many ways a status quo power, yet it shares Russia, China, and other middle powers' perspective that the current international order is too Western-centric. Because of its institutional anchor in the West through its NATO membership and association with the EU, committed revisionists like China and Russia don't trust it and have been wary of allowing Ankara into clubs like the BRICS or the Shanghai Cooperation Organization (SCO).

Turkey's strategic ambitions also place it at odds with Russia in other ways. While prioritising the Middle East (especially securing Turkey's borders from the threat of Kurdish militancy or transnational terrorism) and its financial and economic ties with the Gulf States, Erdoğan and the ruling Justice and Development (AK) Party emphasise Turkey's capabilities as a security provider and driver of connectivity and development in multiple regions – the Black Sea, the Balkans, the Caucasus, Central Asia and North Africa.

In all these regions, Turkey finds itself facing down Russia, a longtime foe that's also a key economic partner. Ankara's complex interactions with Moscow cause frustration in

Western capitals, though Erdoğan argues that its ability to talk to all sides makes Turkey a more valuable partner – including for the West. While Turkey is gradually reaching into the Indo-Pacific, its relations with China remain far less extensive and much less developed.

This Policy Brief provides guidance on how the EU and the US can continue to cultivate stronger relations with Turkey in an increasingly fragmented international environment. It examines the key economic, energy and security dimensions of Turkey's evolving foreign policy, tracing how Ankara's pursuit of strategic autonomy affects its engagement with both Western and non-Western partners. It highlights where interests converge and diverge, before outlining concrete policy options for Western actors to sustain cooperation, mitigate friction and ensure Turkey remains a constructive and reliable player within the transatlantic community.

TURKEY'S ECONOMIC BALANCING ACT – BETWEEN INTEGRATION AND DIVERSIFICATION

Turkey's economic geography sits at the crossroads of Europe and Asia, binding it to the EU while opening new pathways towards emerging markets. Understanding how Ankara manages this dual orientation is key to assessing whether its growing diversification can complement, rather than dilute, its Western integration.

With a history of inflation and economic volatility, exacerbated in recent years by debt and the government's inconsistent approach to monetary policy, Turkey has a series of structural vulnerabilities that other powers often seek to leverage. [US-Turkey trade](#) and investment ties are rather limited – bilateral trade rose from USD 20.6 billion in 2019 to approximately USD 32.1 billion in 2024.

The EU, however, is Turkey's largest trading partner and source of foreign investment. A 1996 Customs Union provides Turkey with tariff-free access to the EU market for industrial goods and enables its integration into European value chains. [EU-Turkey trade](#) amounted to more than EUR 210 billion in 2024, with 41 % of Turkey's exports heading to Europe and more than 32 % of its imports originating there. In 2024, Türkiye attracted USD [11.3 billion](#) in total FDI, with over [70 %](#) of this capital originating from EU Member States.

The weight of this economic relationship, along with the EU's status as a declining regulatory superpower, provides an incentive for Ankara to align its economic, trade and even foreign and security policies with Brussels. In practice, however, relations have often been fraught. Persistent disputes over political reform, Ankara's ties with Moscow despite Western sanctions, the status of Cyprus, energy cooperation and democratic backsliding within Turkey have all tempered the impact of close economic ties. While both sides endorse modernising the Customs Union to include services, public procurement, and other areas, these tensions have hindered Member States' consensus, delaying the start of formal negotiations.

Russia is another important economic partner. Turkey's engagement with Russia reflects its pursuit of strategic autonomy, prioritising its national interests over aligning with any particular bloc. Cooperation on gas, nuclear power and trade bolsters regional leverage and energy security yet also highlights dependency risks in critical sectors. Much bilateral trade centres on Turkey purchasing Russian energy. Turkey also purchases substantial amounts of Russian industrial and consumer goods, and is a major destination for Russian tourists, while Russia is an important market for Turkish agricultural exports. Turkey is among the few major countries that Russia maintains a [trade surplus](#) with, which amounted to around USD 35 billion in 2024.

Moscow has been willing to leverage these economic ties. Following the downing of a Russian fighter plane that violated Turkish airspace in late 2015, Moscow imposed an embargo on Turkish tomatoes and other agricultural exports, while Russian travel agencies cancelled large numbers of bookings. This continued until [President Erdoğan](#) issued a [carefully worded apology](#). Shortly afterwards, Ankara announced the purchase of a Russian-made S-400 air defence system, leading to its expulsion from the US-led F-35 fighter programme and the sanctioning of the Turkish Presidency of Defence Industries (which oversees the country's defence industrial base) under the Countering America's Adversaries Through Sanctions Act.

Turkey has refused to impose sanctions on Russia following its full-scale invasion of Ukraine (despite its stated commitment to Ukrainian territorial integrity and regularly providing weapons and other defence articles to Kyiv). Between USD 4 billion and USD 6 billion of [Russian capital](#) has flowed into Turkey since the invasion. [Bilateral trade](#) spiked from USD 34.7 billion in 2021 to USD 68 billion in 2022, with imports jumping by as much [as 200 %](#) in the immediate aftermath of the invasion and the imposition of Western sanctions.

Several Turkish companies have also been implicated in sanctions avoidance schemes – both the US and the EU have highlighted non-compliant Turkish firms. Ankara has been [responsive](#) to US and European efforts to curb specific activities, including limiting the export of dual-use items like semiconductors and other electronic equipment. The sanctions' mounting impact has contributed to the gradual decline of Russia-Turkey trade from its post-invasion peak, though overall trade turnover still remains higher ([USD 46 billion in 2024](#)) than it was before the invasion, and following President [Erdoğan's call for](#) further boosting bilateral trade during a November 2024 meeting with President Putin.

Compared to Russia and the EU, Turkey's has [a modest economic relationship](#) with China. Trade volumes rose from USD 1 billion in 2000 to USD [45.2 billion](#) in 2024. Chinese investments in Turkey reached about USD 5 billion in 2024. Turkey supports China's Belt and Road Initiative, signing a 2015 MoU to align it with the Turkish-backed Middle Corridor. The first Joint Working Group meeting was held in Beijing on 6 November 2024. Turkey has also received significant financing from the China-backed [Asian Infrastructure Investment Bank](#) (AIIB), particularly in the energy sector.

Though Turkey mostly imports finished goods from China, it's gradually acquiring its own place in Chinese supply chains. In July 2024, BYD agreed to build a USD 1 billion EV plant (150 000 cars a year) and an R&D centre, employing up to 5 000 workers by the end of 2026. Cherry confirmed its own USD 1 billion plant in Samsun (200 000 cars per year). These deals bring committed Chinese FDI in Turkey's automotive sector to USD 2 billion,

raising total Chinese direct investment from USD 1.7 billion in 2022 to over USD 3.5 billion.

A currency swap deal that began in 2012 (TRY [3 billion](#) or RMB 10 billion) between the Chinese and Turkish Central Banks expanded in 2019 and 2021, and was renewed for three years in 2025 at TRY [189](#) billion (or USD 4.8 billion). For China, this agreement helps it in its quest to internationalise the yuan and for Turkey, it offers liquidity and supports trade amid de-dollarisation.

Turkey also has more ambitious aims in Asia, which it sees as both a centre of economic opportunity and a partner for constructing a more multipolar global order. Turkey maintains strategic partnerships with Indonesia, Malaysia, Japan, Singapore and South Korea and has expanded both diplomatic outreach and trade ties across Asia in recent years. It especially prioritises close ties with [Muslim-majority](#) states in Asia.

In 2019, Ankara launched the [Asia Anew](#) Initiative to expand and systematise relations with states across South, Southeast, and East Asia. The initiative focuses on states sharing Turkey's aspiration to stand aside from great power competition while maximising opportunities to engage with all sides. Turkey has devoted particular attention to ASEAN, an example of the kind of open regional architecture it seeks to promote. Turkey began sectoral dialogue partnerships with ASEAN in 2017 and aspires – in principle – to become a full-fledged ASEAN Dialogue Partner.

TURKEY'S ENERGY CROSSROADS — BETWEEN DEPENDENCY AND DIVERSIFICATION

Energy remains one of the most revealing mirrors of Turkey's strategic behaviour, where ambition meets constraint. Examining how Ankara balances dependency on Russian hydrocarbons with its pursuit of renewables partnerships with the EU and the US sheds light on its broader geopolitical calculus.

The economic growth that has transformed Turkey over the past 20 years has boosted demand for imported oil, gas, electricity and other natural resources. Despite its location at the nexus of multiple production sites, [Türkiye imported](#) 72 % of its total energy consumption in 2023, with total imports increasing 141 % from 2020 to 2023.

This import dependence represents a strategic vulnerability that Ankara has long sought to overcome. Turkey has been taking steps to increase imports from alternate producers, such as Iraq and Azerbaijan, and to boost domestic production (especially from the [Sakarya gas field](#) in the Black Sea). Yet demand continues to outpace supply and, despite [encouraging rhetoric](#) from officials, self-sufficiency won't happen anytime soon.

The AK Party aspires to transform Turkey into an ‘energy hub’ linking European markets to resources in the eastern Mediterranean, the Black Sea, the Middle East and the Caspian Basin. While challenging, these ambitions provide a further incentive for Ankara to hedge its strategic alignments, maintaining a *modus vivendi* with both Russia and Europe, while also seeking out additional oil and gas.

Turkey already offers a vital energy link through the Southern Gas Corridor, which delivers Caspian gas to Europe via the TANAP and TAP pipelines. These projects, co-financed by European institutions such as the European Investment Bank and supported by the European Commission, underscore Ankara’s role in diversifying EU energy supplies away from Russia.

Renewable energy is also one of the cooperation areas between Turkey and the EU. As of 2024, Turkey’s installed renewable energy capacity surpassed 58 GW, with EU firms actively participating in solar, wind and hydro projects. Technical dialogue is also continuing on carbon pricing and potential alignment with the EU’s [Carbon Border Adjustment Mechanism \(CBAM\)](#).

The US is also becoming more important for Turkey's energy security, especially as Ankara seeks to diversify its sources of natural gas by enhancing its LNG terminal capacity and increasing spot market flexibility. According to EMRA data, Turkey imported [10.7](#) % of the gas it consumed in 2024 from the US, an increase of more than 100 % compared to the previous year. In April 2024, Turkey’s state-owned BOTAŞ signed a long-term deal with ExxonMobil for [2.5](#) million tons of LNG annually.

American companies have reportedly expressed interest in developing Turkey’s nuclear power capacity, by offering [Small Modular Reactor \(SMR\)](#) technologies. Areas like energy storage, hydrogen production and clean energy finance have also been highlighted in bilateral discussions, signalling a gradual shift from fossil fuels to more sustainable forms of energy collaboration.

Yet despite its efforts to diversify over the past decade or so, [Russia still accounted](#) for around [41](#) % of Turkey’s natural gas imports and [66](#) % of its oil imports in 2024. Following Russia’s invasion of Ukraine, Turkey didn’t impose sanctions, instead securing Russian energy at a discount while still engaging with the West. In October 2022, President Putin offered his support for Erdoğan’s longstanding ambition to turn Turkey into a ‘gas hub,’ proposing Thrace as a pricing and distribution centre for Russian gas sales to Europe. Turkey also depends on Russia for [nuclear energy](#). Russia’s state-owned Rosatom runs Turkey’s only currently operational nuclear power plant at Akkuyu on a ‘build-own-operate’ model that ensures Rosatom’s involvement throughout the plant’s lifecycle.

Energy relations between China and Turkey are also based mainly on credit and investment. The best example is the coal-powered EMBA Hunutlu Project in Adana (1 320 MW), China's largest investment in Turkey, led by Shanghai Electric Power, with USD 1.381 billion of financing from China Development Bank and ICBC. On top of power plants, China has also taken a role in Turkey's [ongoing storage facilities project](#). The Tuz Gölü gas storage project came online with a USD 1.4 billion World Bank loan; the Chinese-backed AIIB provided USD 600 million, while Tianchen Engineering built the one billion m³ facility, which began operating in 2017.

Turkey also heavily depends on Chinese-made solar modules; in 2022-23, about one third of China's solar cell exports went to Turkey. In 2024, both sides signed a preliminary framework on the energy transition, covering critical raw materials, rare-earth mining, battery storage, green hydrogen and modular nuclear reactors, with SPIC and CATL as key partners.

TURKEY'S EXPANDING DEFENCE FOOTPRINT – BETWEEN ALLIANCE AND AUTONOMY

Turkey's defence posture captures its larger paradox: a NATO ally pursuing strategic autonomy. The evolution of its defence industry and regional interventions offers clues to how Ankara seeks to reconcile partnership with independence in an increasingly fragmented security environment.

As a NATO ally, Turkey remains a key element of trans-Atlantic defence and security. The Turkish military is NATO's second largest after the US and unlike many allies, Turkish forces have substantial combat experience thanks to their role in recent conflicts in Iraq, Syria, Afghanistan and elsewhere. The 1936 Montreux Convention, which allows Ankara to regulate the passage of warships into and out of the Black Sea, makes Turkey crucial to containing Russian expansion and maintaining a stable equilibrium in the Black Sea.

Turkey is also emerging as a major [producer and exporter](#) of weapons and other military systems. Its defence production is generally of high quality and low cost, which makes it appealing to several developing states and emerging economies. Turkey's defence industry is strong in uncrewed aerial systems, artillery and armour, and midsized naval vessels.

The wars in Ukraine and the Middle East have been catalysts for Turkey's increased defence production. With NATO poised to substantially boost defence spending in the wake of the [2025 Hague Summit](#), Turkey could be well-placed to capture a larger share of the European defence market, which can be seen through initiatives such as the [attempted acquisition of Italy's Piaggio Aerospace](#). Yet many European countries are

wary of depending on Turkey for critical security capabilities. This stems from friction between Turkey and other NATO members (notably Greece and France), Cyprus' unresolved status, Ankara's aspiration for strategic autonomy, concern about the direction of Turkish domestic politics and, perhaps most importantly, Turkey's ambiguous relationship with Russia.

The EU's newly launched EUR 150 billion [Strategic Technologies for Europe Platform \(SAFE\)](#) is set to play a major role in shaping the future of the European defence ecosystem. Turkey, however, remains outside, limiting its access to EU funding and joint procurement schemes. Nevertheless, Ankara's expanding defence sector and export potential make it a credible partner should the EU adopt a more inclusive approach. The EU could consider offering conditional access to its defence market, particularly within the SAFE framework, in exchange for domestic reforms in Turkey that strengthen rule of law, procurement transparency and alignment with EU defence standard.

Turkish officials have repeatedly emphasised their support for Ukraine's territorial integrity – including Crimea, whose indigenous Crimean Tatar population maintains a large diaspora community in Turkey – while simultaneously supplying Kyiv with military equipment such as Bayraktar TB2 drones and facilitating the Black Sea Grain Initiative. These contributions played a notable role during the early months of the war, when Ukrainian forces inflicted significant losses on Russia's military.

Shortly after the Russian invasion, Ankara also agreed to Kyiv's request to [close the Bosphorus and Dardanelles](#) straits to warships. The closure prevented Moscow from reinforcing its Black Sea Fleet and contributed to Ukraine's success in denying Russia sea control. The closure of the Straits, however, also limited NATO's ability to send warships into the Black Sea. In this sense, it reinforced Ankara's efforts to portray itself as a force for peace while maintaining relationships with both Moscow and Western capitals.

Turkey has attempted, with mixed success, to act as an intermediary between Moscow and Kyiv. It hosted negotiations in spring 2022 on a possible ceasefire (de-railed by the discovery of Russian atrocities in towns like Bucha and Irpin). Turkish diplomacy was more successful in establishing a corridor for exporting [Ukrainian grain](#) from Black Sea ports, which operated from 2022-23, and in facilitating Russia-Ukraine prisoner exchanges. In January 2024, Turkey agreed to set up a [Black Sea Mine Countermeasures Task Group](#) with Romania and Bulgaria, an initiative that required overcoming Romanian and Bulgarian wariness about the extent of Russian-Turkish ties. Most recently, President Erdoğan hosted a new round of ceasefire talks in Istanbul in the [summer of 2025](#).

Aside from the Black Sea, Turkish and Russian forces have interacted and clashed in numerous theatres over the past decade. Despite Russia's general military superiority,

Ankara has secured strategic victories over Moscow in Syria, Libya, and the South Caucasus.

Syria has seen the most direct clashes between Russian and Turkish forces. In February 2020, Russian Aerospace Forces [bombed Turkish positions](#) in the vicinity of Idlib, killing dozens of Turkish troops. Idlib was a hub for the Turkish-backed Hayat Tahrir al-Sham (HTS) rebels, who dramatically broke out in late 2024 and [seized Damascus](#) from Bashar al-Assad's Russian-backed regime.

Russian and Turkish forces also faced off in Libya, where [Ankara deployed troops](#) and Syrian mercenaries to support the UN-backed Government of National Accord against the warlord Khalifa Haftar and fighters from the Russian Wagner Group. Turkish intervention was crucial to the GNA's ability to beat back Haftar's forces, leading to Libya's *de facto* partition.

In the South Caucasus, [Turkish support](#) facilitated Azerbaijan's crushing victory over nominally Russia-backed Armenia, which secured the withdrawal of Russian peacekeepers and created a window of opportunity for a possible [peace agreement](#) that would make the region a key artery for Turkey's aspirations to connect Europe and Asia.

Its alliance with Azerbaijan is perhaps the starkest example of Turkey's growing defence and security ambitions. Turkish support was instrumental in modernising Azerbaijan's army. Turkish officials remain deeply embedded in Baku's defence bureaucracy and command structure, while Turkish equipment (including drones) helped shift the balance of power in Baku's favour. This allowed Azerbaijan not only to triumph over Armenia but to position itself as an independent player in the South Caucasus, allowing it to engage both Russia and Iran from a position of strength.

Meanwhile, Ankara's success in modernising the Azerbaijani military provided a template that has proven attractive to other post-Soviet militaries. Central Asian governments have struck deals to purchase Turkish drones and other weapons systems, challenging [Russia's inherited role](#) as the principal security partner for the region. Turkey's defence industry is also carving out a niche for itself [in Africa](#), where many states are looking to acquire affordable, reliable equipment with minimal strings attached.

HOW THE US AND EU SHOULD ENGAGE WITH TURKEY

The US and Europe should focus on maximising Turkey's integration with the norms and institutions of the existing world order. While Ankara will maintain ties to Moscow and – to a lesser degree – Beijing in discrete areas, the Western powers can still shape the direction and intensity of Turkey's alignment with these revisionist powers. Turkey's Euro-Atlantic ties remain a valuable asset but must become more than mere relics of an earlier era. The US, EU and NATO all need to rethink and reconceptualise their relations with Turkey through pragmatic cooperation that reflects both shared interests and evolving geopolitical realities.

The US – resetting cooperation on strategic fronts

The US should work with Ankara to address key friction points, including US support for the Syrian YPG/PYD, Turkey's exclusion from the F-35 programme, differing approaches to regional conflicts and the need for closer energy cooperation. While US and Turkish interests do not wholly align, the current US administration presents an opportunity to develop a more stable and forward-looking framework for cooperation.

Specifically, the US should:

- Take advantage of its opening with the new Syrian government to push for a compromise that safeguards Kurdish autonomy within a more federalised Syria, while securing disarmament and acceptance of both Syrian and Turkish territorial integrity.
- Support Turkish and Syrian government efforts to reduce or expel the Russian military and paramilitary presence in Syria as part of a wider stabilisation deal.
- Work closely with Turkey on efforts to negotiate a ceasefire in Ukraine and encourage Turkish contributions to both a post-ceasefire reassurance force and the rebuilding of Ukraine's defence-industrial base.
- Support Turkey's role as an alternative security provider to Russia in the South Caucasus, Central Asia and Africa.
- Promote US private-sector investment in Turkey's nuclear power and energy transit sectors. The recent 20-year LNG supply agreement between the two countries and their joint target to increase bilateral trade to USD 100 billion provide a foundation for deeper cooperation on the energy transition. Expanding collaboration on LNG, renewables and climate action would not only boost trade but also help balance Turkey's dependence on Russian gas.

The EU – anchoring diversification within a Western framework

The EU should adopt a pragmatic strategy that strengthens Turkey's economic integration, advances cooperation on energy and climate, and rebuilds trust in defence and security. Building on deep trade and investment ties, Brussels can help align Turkey's diversification efforts with European rules and standards while reinforcing its anchorage within the broader transatlantic community.

Specifically, the EU should:

- Advance efforts to modernise the Customs Union to anchor Turkey's economic diversification, while Ankara formalises a framework that balances Western ties with its outreach to Asia. This would reduce Turkey's vulnerability to market disruptions and reinforce its integration into European value chains.
- Support Turkey in establishing a national carbon-pricing system and aligning with the EU's decarbonisation agenda. At the same time, expand technical and financial assistance to facilitate smoother integration with the CBAM and strengthen joint energy security.
- Within the SAFE framework, explore opening selected defence-industrial projects to Turkish participation on a conditional basis. Access should be tied to demonstrable progress on rule-of-law and procurement-transparency reforms, alongside a structured dialogue on standards alignment and joint R&D. Such engagement would reduce mutual mistrust, encourage industrial complementarity and gradually rebuild confidence within the Euro-Atlantic defence community.
- Encourage pragmatic engagement between Turkey, Greece and both Cypriot communities through a structured dialogue on Eastern Mediterranean energy governance. The recent election of Tufan Erhürman, a moderate and negotiation-oriented leader in Northern Cyprus, provides a valuable opportunity for the EU to re-engage with both sides and promote confidence-building measures focused on joint energy and security cooperation.

CONCLUSIONS

Turkey's pursuit of strategic autonomy has both opportunities and constraints. Ankara is attempting to simultaneously become indispensable to multiple actors by leveraging its geographical location and middle power status – NATO and the EU for security and market access, Russia for energy and trade, China for investment and diversification, and the 'Global South' for legitimacy and diplomatic outreach. These efforts are part of a multidimensional strategy that positions Asia both as a source of economic opportunity and as a partner in building a more multipolar order, even as Turkey maintains its institutional anchor in the West.

Turkey, however, must still navigate the inherent contradictions between maintaining close relations with revisionist powers while remaining tied to the Western institutional order. Despite Ankara's ambitious outreach, neither China nor Russia can replace the EU as Turkey's central economic partner. While new LNG contracts with the US and renewable energy cooperation with the EU broaden the supply base, Turkey continues to be dependent on discounted Russian oil and gas.

Turkey's active stance on security has elevated the country's profile but also caused friction with its allies, as well as Russia. Along with its NATO membership, Turkey's projection of power into the Black Sea, the Middle East and the South Caucasus has allowed it to engage Moscow from a position of newfound strength. At the same time, its resistance to sanctions and continued openness to Russian money have strained ties with Europe. Neither side really trusts Turkey, even if both recognise its importance. Turkey's expanding defence industry and diplomatic initiatives have meanwhile augmented its influence across Eurasia, Africa and Asia, making it one of the most active and visible of the middle powers shaping the global balance.

Turkey's experience is emblematic of the challenges these middle powers face in a fracturing world order. Its expansive capabilities allow it to position itself as an indispensable interlocutor, even as its economic vulnerability exposes it to the risk of overreach and crisis. Nor can Ankara take its inherited ties to the West for granted. Partnership with the US and Europe is a prerequisite for Turkey to pursue strategic autonomy without risking its stability and wellbeing.

The coming years will provide a test for Ankara's ability to navigate the escalating contradictions inherent in an increasingly multipolar world. Sustaining this balance will require Turkey to reconcile its strategic ambitions with the norms and institutions of the transatlantic community and equally, for the EU and the US to engage Turkey as a partner to be anchored (i.e. not contained) through the pragmatic and confidence-building steps outlined in the above guidance.



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