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RESEARCH STUDY

Sinem Adar | Hürcan Aslı Aksoy | Günter Seufert | Gustav Gustenau

Scenarios for Turkey's political development until 2030

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Contents

| | |
|---|-----------|
| 1. INTRODUCTION | 4 |
| 2. METHODOLOGY | 5 |
| 3. THE INDIVIDUAL SCENARIOS | 15 |
| 3.1 DOMESTIC CONFRONTATION AND THE PURSUIT OF AN EXPANSIONIST FOREIGN POLICY | 15 |
| 3.2 CONSOLIDATION OF AUTHORITARIAN RULE AND FORMATION OF AN ANTI-WESTERN ALLIANCE | 16 |
| 3.3 A NEW INTERNAL BALANCE OF POWER AND THE FORMATION OF AN ANTI-WESTERN ALLIANCE | 17 |
| 3.4 DOMESTIC POLITICAL MISMANAGEMENT WITH FOREIGN POLICY INTEGRATION INTO THE WEST | 19 |
| 3.5 CONSOLIDATION OF AUTHORITARIAN RULE WITH FOREIGN POLICY INTEGRATION INTO THE WEST | 20 |
| 3.6 AWAKENING OF THE AUTHORITARIAN REGIME AND PARTIAL COOPERATION WITH THE WEST | 21 |
| 4. ASSESSMENT OF THE PROBABILITY OF OCCURRENCE OF THE INDIVIDUAL SCENARIOS | 22 |
| 5. RISKS FOR GERMAN AND EUROPEAN POLICY | 25 |
| 5.1 THE LIST OF POTENTIAL RISKS | 25 |
| 5.2 RISK ASSESSMENT | 26 |
| 5.3 DESCRIPTION OF INDIVIDUAL KEY RISKS AND RECOMMENDATIONS FOR ACTION | 29 |
| 5.3.1 <i>Germany's policy within and towards the European Union</i> | 29 |
| 5.3.2 <i>Germany's policy within and towards NATO</i> | 40 |
| 5.3.3 <i>Germany's bilateral policy towards Turkey</i> | 41 |
| 5.3.3.1 Economic policy | 41 |
| 5.3.3.2 Migration policy | 43 |
| 5.3.3.3 Integration policy | 43 |
| 5.3.3.4 Security policy | 47 |
| 6. ABOUT THE AUTHORS | 50 |

1. Introduction

Turkey plays an even more central role in German politics than it does for Europe. It is of great importance to Europe as a member of NATO, as a country bordering the Black Sea and the Mediterranean, as a transit country for irregular migration, as a host country for refugees from the Middle East, as a player in Africa and Central Asia and as a loud voice among the countries of the Islamic world.

Not only, but especially for Germany, these foreign policy, domestic and economic policy circumstances and challenges are added to. The long historical connection between Germany (or Prussia) and Turkey, the recruitment of Turkish workers and the subsequent, unintended chain migration in the context of family reunification and the granting of asylum have led to the emergence of a large diaspora of Turkish origin in Germany. A permanent transnational space has emerged between the two countries, which on the one hand has further intensified economic exchange and on the other has made the Federal Republic a sounding board for economic crises and political tensions in Turkey.

For decades now, Germany has been one of Turkey's largest and most sought-after trading partners, but it is also the primary destination for global Turkish migration and, in addition, the sphere of action for almost all political movements in Turkey, some of which - regardless of who is currently in power in Turkey - have a conflictual relationship with the Turkish government.

On the one hand, Turkey offers Germany great potential for security, economic and socio-political cooperation, but on the other hand it also represents a source of challenges and risks in all these areas.

For this reason, the Center for Applied Turkey Research (CATS) at the SWP and experienced scenario developers at the European Institute for Counter Terrorism and Conflict Prevention (EICTP) in Vienna have created several possible scenarios for Turkey's future development up to 2030 in a series of workshops in Vienna and Berlin over the course of 2023 and 2024. Political desirability did not play a role. When constructing the scenarios, possible courses of domestic and economic policy as well as regional and geopolitical factors were taken into account.

The aim of the exercise was to think through the scenarios developed, or possibly only the scenario most likely to occur, in terms of the risks associated with them, and to discuss options for action with German policy advisors and decision-makers. In an internal workshop at the SWP in October 2024, members of various German ministries had the opportunity to familiarize themselves with the exercise. They discussed the scenario that seemed most likely at the time, a scenario in which authoritarian power consolidated in Turkey and the country threatened to become part of an anti-Western alliance.

Due to the radical change in US policy under Donald Trump, the question now arises as to how European-Turkish relations will be shaped in the future under the new parameters of a primacy of security and defense policy. The considerations at the end of this study show that scenario development is also and especially helpful for such unpredictable upheavals.

2. Methodology

There are various ways to create scenarios. The CATS¹ researchers used the *Scenario Technique* method and the **SPHEERE method**, from the Vienna-based EICPT. No assessment is left to the software itself. Its use is limited to the aggregation of the strength of *influencing factors*, *the calculation of their interactions and the selection of consistent* development options of the most relevant influencing factors for future scenarios. The analyses and evaluations are carried out by experts in the respective field. The software's calculations produce results based on this evaluation, which are visualized in tabular and graphical form.

This is done in five stages, which in our case were taken as part of workshops in which members of the CATS worked together with the scenario experts from the EICPT. The scenario development itself comprises four stages, after which the risks and options for action for German policy are derived in the fifth stage.

In the first stage, which can be described as ***an environment analysis*** irrespective of the subject matter, the team first worked out the *policy areas* whose dynamics (could) determine Turkey's current and future development.

This category includes both areas of politics with their own dynamics that trigger political action, as well as political actions and strategies of the Turkish government directed towards these areas. Examples include 'Economy & economic policy', 'Kurdish question & Kurdish policy', 'Migration & migration policy' and 'Global configurations and challenges'.

In a second step at this level, the dynamics of the identified *policy areas* were broken down into a series of concretely observable *influencing factors*. This category also includes political dynamics as well as government action and strategies. For example, 'defense industry', 'public and private debt' or 'energy' were identified as *impact factors* for the *policy field* 'economy & economic policy'.

The result of the first stage can be illustrated using the following table: The first row lists all (in our case nine) *policy fields*. The columns under the respective *policy fields* contain the individual *influencing factors* that constitute the *policy field* as such.

Environment analysis: excerpt from the **SPHEERE method**

¹ The Centre for Applied Turkey Studies (CATS) is funded by Stiftung Mercator and the Federal Foreign Office.

| A Economy | B The Kurdish issue | C Demography and migration | D The political role of religion | E Governance | F Turkey's relations with Europe/the EU | G Turkey in its region | H Turkey on the global stage | I Global strategic environment |
|--|--|-------------------------------|--|---|--|--|--|--|
| 1 Defense industry | 1 Turkey's handling of the Kurdish Question | 1 Migration (In+Out) | 1 State-religion relations / Imagination of the nation (Societal Sunni... | 1 Personalization of power | 1 EU-Turkey relations | 1 Developments in Syria (WS Türkei) | 1 Geostrategic vision and imagination | 1 Systemic rivalry |
| 2 Commodity based industry and service sector | 2 Relations with the KRG | 2 Family policy | 2 Gov. policy on Religion (MEB/YÖK/DIYANET) | 2 Impact of societal diversification on political representation | 2 Policy towards France | 2 Black Sea policy (Ukraine) | 2 NATO-Turkey relations | 2 Global economic development |
| 3 Public and private debt | 3 Military engagement in Northern Syria (WS Türkei) | 3 Naturalization policies | 3 Empowerment of non-state religious actors | 3 State institutions | 3 Policy towards Germany | 3 Relations with non-EU NATO members | 3 Turkish-Russian relations | 3 Global technological developments |
| 4 Energy | 4 Kurdish transnational networks | 4 Integration policies | 4 Societal resistance to Gov. Policy on religion | 4 Elimination of separation of powers | 4 Policy towards Italy&Spain | 4 Relations with non-EU European players (UK/Ukraine) | 4 Policy towards the USA | 4 Climate change |

The diagram does not show all influencing factors, the number of which amounted to 65 in our case. Naturally, not all of the *influencing factors* identified can have an equally strong influence on the development of their *policy area* and thus also on Turkey's overall development.

In the second stage of the so-called *interaction analysis*, the *influencing factors* with a low impact were therefore excluded, also in order to reduce the complexity of the analysis to a manageable level.

In order to be able to determine the impact of the individual influencing factors in relation to all other influencing factors, all factors were first arranged on a horizontal X-axis and a vertical Y-axis.

The expert group then assessed for each individual influencing factor, which all appear on the vertical Y-axis, what influence they believe this factor has on the influencing factors, which are also all listed on the horizontal X-axis.

The question was therefore asked what influence factor A - as an element of the 'active' Y-axis - has on factor B - as an element of the 'passive' X-axis - but also what influence factor B - now as an element of the 'active' Y-axis - has on factor A - now as an element of the 'passive' X-axis.

The influence attributed in each case was quantified from 0 (no influence) to 1 (perceptible influence) to 2 (strong influence).

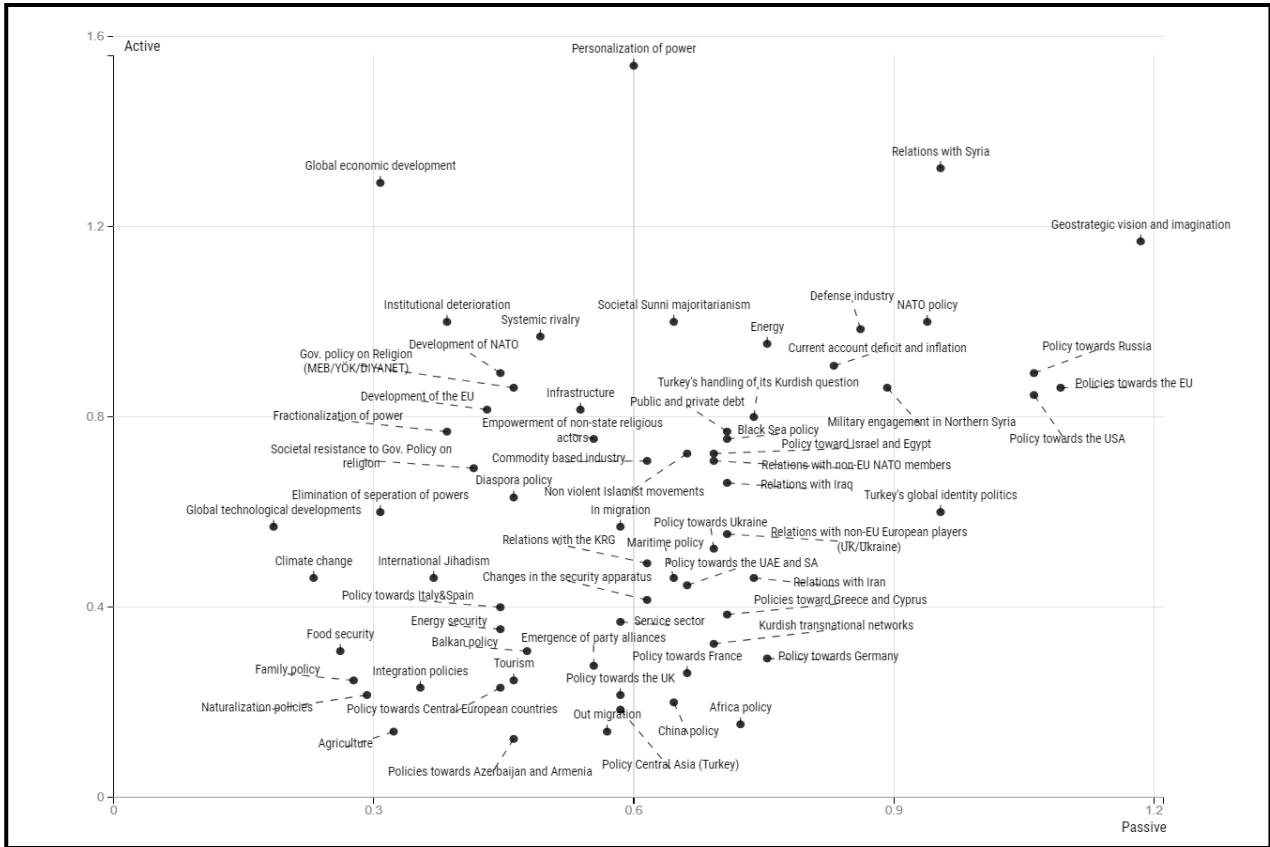
For example, Turkey's relations with NATO were said to have a major influence on Turkey's relations with the EU, while - perhaps surprisingly for some - the state's religious/Islamic policy was said to have no influence on Turkey's relations with NATO.

Here is an excerpt from the table with the evaluations of the effect of influencing factors on each other

| Rating creator | | Algorithm 1 | | | | | | |
|--|---------|-----------------------|---------------------|--|-----------------------------|-----------------------------------|---------------------|----------------------------|
| All Users | | Arithmetic mean | | | | | | |
| Question: Impact of factors on each other 1 | | | | | | | | |
| ↻ | Passive | NATO-Turkey relations | EU-Turkey relations | State-religion relations / Imagination of the... | Global economic development | Developments in Syria (WS Türkei) | Relations with Iraq | Black Sea policy (Ukraine) |
| Active | # | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| NATO-Turkey relations | 1 | | 2 | 0 | 0 | 2 | 1 | 2 |
| EU-Turkey relations | 2 | 1 | | 1 | 0 | 1 | 0 | 1 |
| State-religion relations / Imagination of the... | 3 | 0 | 1 | | 1 | 2 | 2 | 0 |
| Global economic development | 4 | 1 | 2 | 0 | | 0 | 1 | 3 |
| Developments in Syria (WS Türkei) | 5 | 1 | 1 | 0 | 0 | | 2 | 1 |
| Relations with Iraq | 6 | 1 | 1 | 0 | 0 | 2 | | 1 |
| Black Sea policy (Ukraine) | 7 | 2 | 1 | 0 | 1 | 1 | 0 | |
| Diaspora policy | 8 | 0 | 1 | 1 | 0 | 0 | 1 | 0 |
| Policy towards the USA | 9 | 2 | 1 | 0 | 1 | 1 | 1 | 2 |
| Current account deficit and inflation | 10 | 0 | 1 | 1 | 0 | 1 | 1 | 2 |
| Tourism | 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Defense industry | 12 | 3 | 1 | 0 | 1 | 1 | 1 | 2 |
| China policy | 13 | 1 | 1 | 0 | 1 | 0 | 0 | 0 |
| Turkish-Russian relations | 14 | 3 | 1 | 0 | 0 | 2 | 1 | 3 |
| Energy | 15 | 1 | 2 | 0 | 1 | 1 | 2 | 2 |
| Service sector | 16 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| Systemic rivalry | 17 | 3 | 2 | 0 | 3 | 1 | 1 | 2 |
| Infrastructure | 18 | 0 | 2 | 0 | 0 | 1 | 1 | 0 |
| Public and private debt | 19 | 0 | 1 | 0 | 1 | 1 | 1 | 1 |
| Agriculture | 20 | 0 | 1 | 0 | 0 | 1 | 0 | 0 |
| Commodity based industry and service... | 21 | 0 | 2 | 0 | 1 | 1 | 1 | 0 |

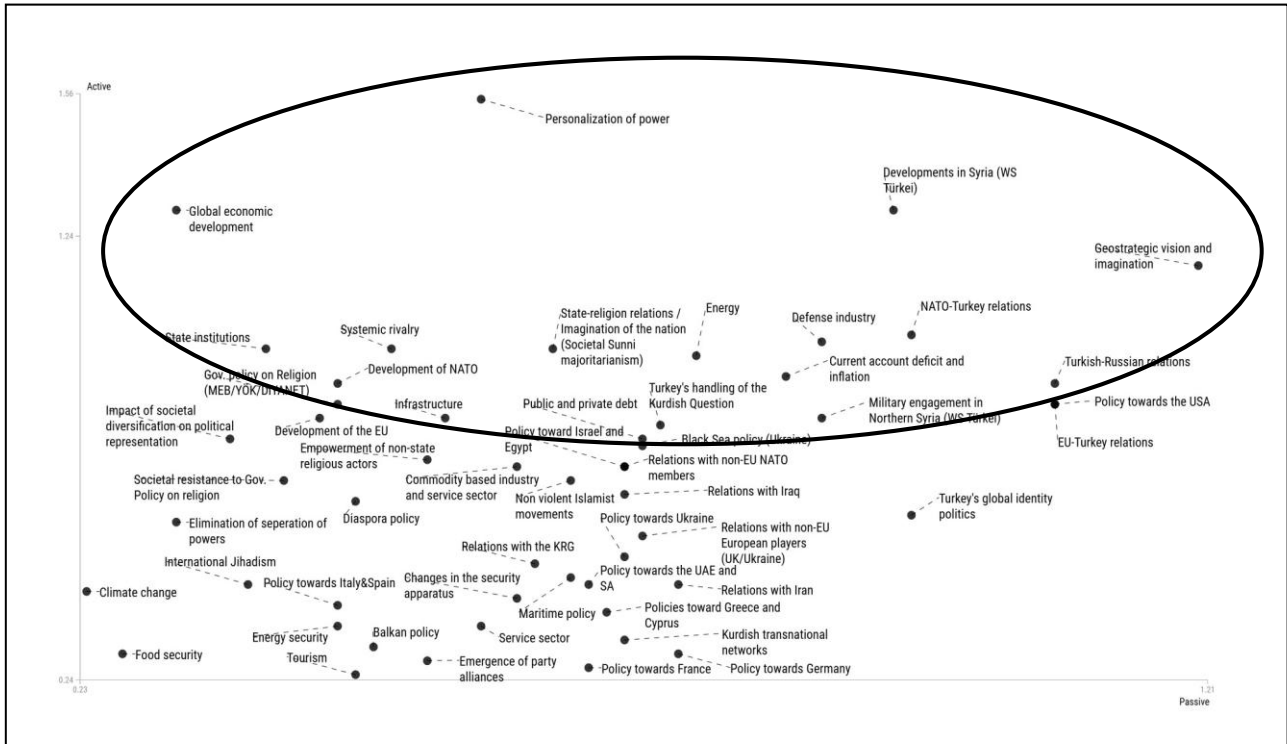
In the following, the **SPHERE method** created a diagram in which the influencing factors that were considered to have a high influence on other factors appear in the upper area of the Y-axis and those that were classified as more passive appear in the lower area of the Y-axis. The further the factors appear on the X-axis, the more they function as so-called "system nodes" that interact with other factors, while low values on the X-axis are an indication that the influencing factor is only slightly connected to other factors, whether actively or passively.

Here is the diagram



Based on the two criteria mentioned above, the team then selected 18 so-called *key factors* that were considered to have the highest impact and relatively high interconnectivity.

The next diagram shows the selection of highly active and passive factors that are now becoming key factors.



The 18 *key factors* ultimately selected are

- Personalization of rule, state of public and political institutions,
- NATO-TR relations, EU-TR relations
- Kurdish question, developments in Syria,
- Global system competition, Turkey's geostrategic vision, Global economic development
- TR-Russia relations, Black Sea policy
- Manufacturing industry and services, defense industry, energy
- Religion/Islam policy, Social differentiation
- Immigration and emigration
- Public and private debt

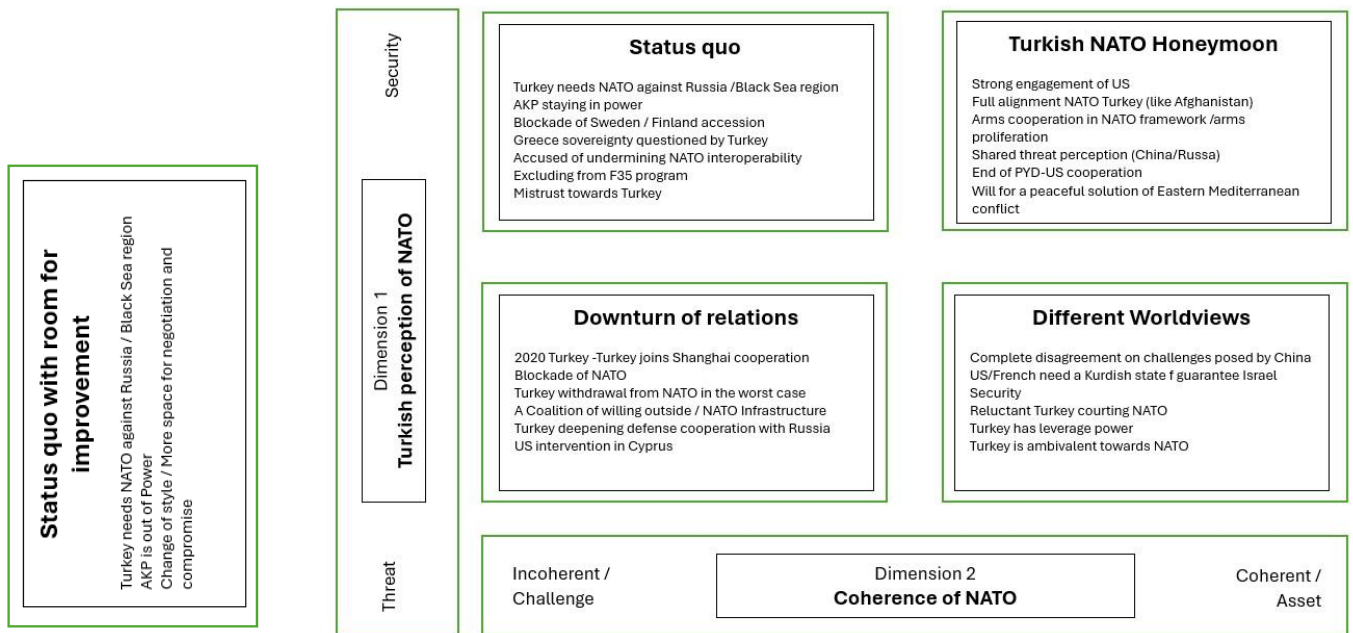
The third stage focuses on the development of so-called *future projections*. This means that alternative development paths are projected for each of the 18 isolated key factors.

The overarching question in each case is: How could the respective policy area develop?

The aim here is to avoid limiting the idea of possible development paths to the two alternatives of 'good' and 'bad', i.e. to a development that the experts regard as positive and, as its only alternative, a development that the experts regard as negative. At the same time, the aim is to ensure that the experts are aware of the framework conditions for possible developments.

To this end, the scenario team must first think about what the framework conditions could be that will decisively shape the future of the respective influencing factor. From the wealth of framework conditions, the two decisive variables for the development of the key factor are derived, which form the x and y axes for the following illustration. Possible development trajectories of the influencing factor are then constructed on the assumption that these framework conditions are more or less given, which automatically leads to the construction of four alternative development trajectories.

An example of this approach is the *future projection of the influencing factor* 'Turkey-NATO relations'.



Relevant aspects regarding future development

- US Turkey relationship
- Transatlantic relations (EU-US)
- Future of NATO
- Orientation / interest of Turkey in NATO
- Instrumentalizing vs Integrating NATO

Greatest uncertainty regarding future development:

- US role in NATO

In this example, Turkey's perception of NATO as a threat or security factor was chosen as one of the two variables for the future development of the influence factor (as dimension 1). The internal coherence of the alliance was determined as the second framework condition (dimension 2).

Depending on the direction in which the two dimensions swing, there are four possible development paths, to which a fifth alternative has been added in this example.

In the fourth stage, the individual future projections of each influencing factor that has been assigned a key role in Turkey's future political development were considered in terms of how likely it is that they will occur together with the future projections of other influencing factors. The procedure is called **consistency analysis**, and here too it is the respective experts who assess how the respective future projections of the individual key factors relate to each other.

The assessments made were quantified. Here, (-2) quantifies the complete inconsistency of two projections whose simultaneous occurrence can be ruled out, (-1) stands for an extensive inconsistency of the two projections; (0) refers to the fact that the two projections exist to a certain extent independently of each other and therefore may or may not occur together; (1) indicates that the two projections under discussion complement or even support each other; and (2) refers to the fact that the two projections complement each other perfectly or strongly support each other. (1.5 and -1.5 refer to the respective mean value).

The ratings were entered into a **consistency matrix** as shown below.

Rating creator: All Users | Algorithm: Arithmetic Mean | Start Scenario calculation

Question: Konsistenz der Zukunftsprojektionen

| | # | 1 | 1A | 1B | 1C | 1D | 2 | 2A | 2B | 2C | 2D | 2E | 3 | 3A | 3B | 3C | 3D | 4 | 4A | 4B | 4C | 4D | 4E | 5 | 5A | 5B | 5C | 5D | |
|--|----|---|----|----|----|----|---|-----|------|------|------|----|---|----|----|----|----|---|----|----|----|----|----|---|----|----|----|----|--|
| Personalization of power | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Authoritarian consolidation | 2A | | 1 | 1 | -1 | 2 | | | | | | | | | | | | | | | | | | | | | | | |
| Bad governance | 2B | | 1 | 1 | 0 | 1 | | | | | | | | | | | | | | | | | | | | | | | |
| A new balance of power | 2C | | 1 | -1 | 1 | -2 | | | | | | | | | | | | | | | | | | | | | | | |
| Confrontation | 2D | | 2 | 1 | -2 | 2 | | | | | | | | | | | | | | | | | | | | | | | |
| Regime change | 2E | | -1 | -1 | 2 | -2 | | | | | | | | | | | | | | | | | | | | | | | |
| Geostrategic vision and imagination | 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Anti-Western Alliance | 3A | | 2 | 1 | -1 | 2 | | 2 | 1 | -0.5 | 1.5 | -1 | | | | | | | | | | | | | | | | | |
| Cold-War Turkey | 3B | | 1 | 1 | -1 | 1 | | 1 | 1 | 1 | -1 | -1 | | | | | | | | | | | | | | | | | |
| Cooperative | 3C | | -1 | 1 | 2 | -2 | | -1 | -1.5 | 1.5 | -1.5 | 0 | | | | | | | | | | | | | | | | | |
| Status Quo: expansionist ideologized politics | 3D | | 2 | 1 | -1 | 1 | | 1.5 | 1.5 | -1 | 1 | -1 | | | | | | | | | | | | | | | | | |
| Developments in Syria | 4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Independent Kurdistan and failed-state Syria | 4A | | 0 | 0 | 0 | 0 | | 0 | 0 | 0 | 1 | 0 | | 1 | -2 | -1 | 1 | | | | | | | | | | | | |
| Division of Syria under Russian influence | 4B | | 0 | 0 | 0 | 0 | | 0 | 0 | 0 | 0 | 0 | | 0 | 0 | 0 | 0 | | | | | | | | | | | | |
| Unification of Syria under Russia's influence | 4C | | 0 | 0 | 0 | 0 | | 0 | 0 | 0.5 | 0 | 0 | | 1 | 1 | 0 | 0 | | | | | | | | | | | | |
| Unified pro-Western Syria | 4D | | 0 | 0 | 0 | 0 | | -1 | 0 | 0 | 0 | 0 | | -2 | 0 | 0 | 0 | | | | | | | | | | | | |
| Status quo | 4E | | 0 | 0 | 0 | 0 | | 1 | 0 | 0 | 0 | 0 | | 1 | -1 | -1 | 1 | | | | | | | | | | | | |
| Impact of societal diversification on political representation | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ideological confrontation | 5A | | 0 | 0 | 0 | 0 | | 2 | 1 | 0 | 1 | 1 | | 1 | 1 | 0 | 1 | | 0 | 1 | 0 | 0 | 1 | | | | | | |

In this matrix, the future projections of the influencing factor 'Personalization of Power' were compared with the future projections of the influencing factor 'Geostrategic Vision and Imagination' in the first field at the top left. This revealed strong interdependencies between the future projections of the two influencing factors. For example, an economic situation that is an economic situation that is experienced as a struggle for

the survival of the state and nation due to another pandemic, military confrontation or dramatic climate events, and a fall/change of the current political regime are practically mutually exclusive (-2), while a global recession coupled with trade wars and increased competition for natural resources can very well be accompanied by an intensification of domestic political confrontation, the banning of opposition parties and trade unions and ultimately the use of the military at home or even renewed military intervention (2).

On the other hand, there is no justifiably acceptable interdependence between the future of the global economy and military/political developments in Syria, which is why the relationship between all future projections of these two key factors was assessed as neutral (0) in the corresponding field of the matrix.

The results of this process are so-called **projection bundles**, which are created when each of the four (or five) alternative future projections of an influencing factor are related to the future projections of all other influencing factors.

A **cluster analysis** carried out by the software then sorted out those combinations of future projections that indicate complete inconsistency.

The software then combined groups of similar projection bundles.

There were clusters that differed primarily according to how prominent the three influencing factors (1) 'Personalization of Power', (2) 'Geostrategic Vision and Imagination' and (3) 'State-Religion Relations' were in them.

A strong correlation of development projections with 'Personalization of Power' points to development trajectories towards autocracy, a weak correlation to trajectories towards democratization.

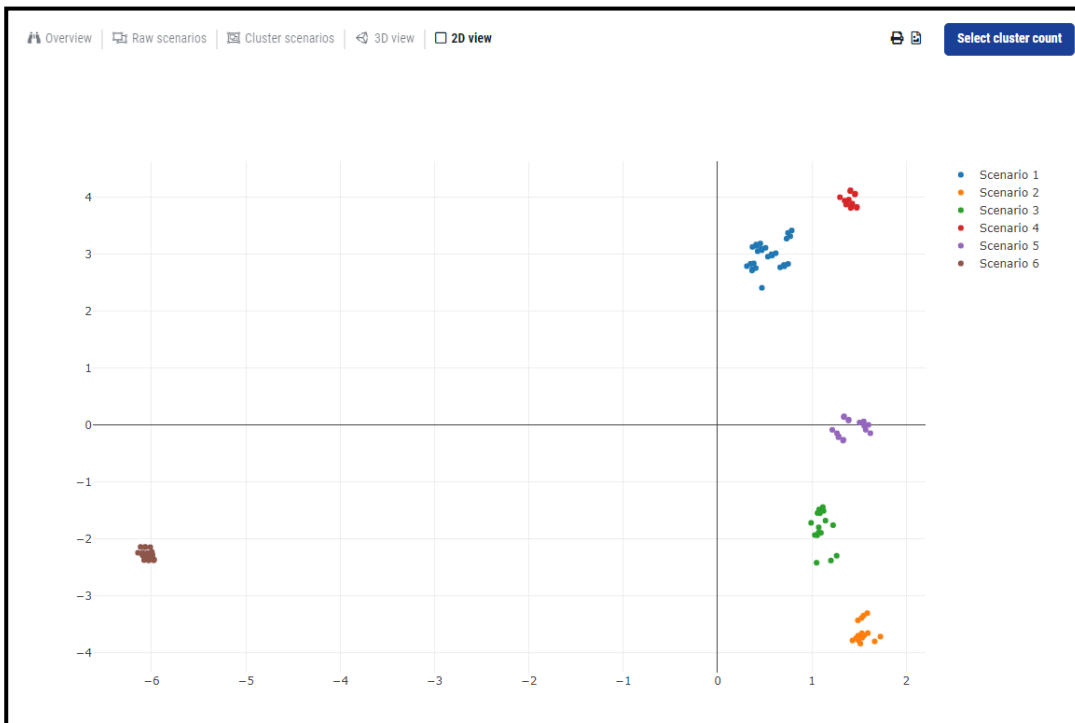
A strong correlation of development projections with 'Geostrategic Vision and Imagination' indicates development trajectories towards an anti-Western orientation and policy. A weak correlation indicates trends towards a pro-Western orientation.

A strong correlation of development trajectories with 'State Religion Relations' indicates a strong presence of religiously connoted positions or conflicts. A weak correlation indicates a relative insignificance of religious positions or conflicts in the political debate.

The projection bundles created in this way can be understood as **raw scenarios** insofar as the bundles of future projections they contain represent the key elements of the later scenarios.

Further characteristic clusters emerged. However, the number of raw scenarios was limited to six by restricting them to the three most prominent ones, each of which significantly shapes raw scenarios.

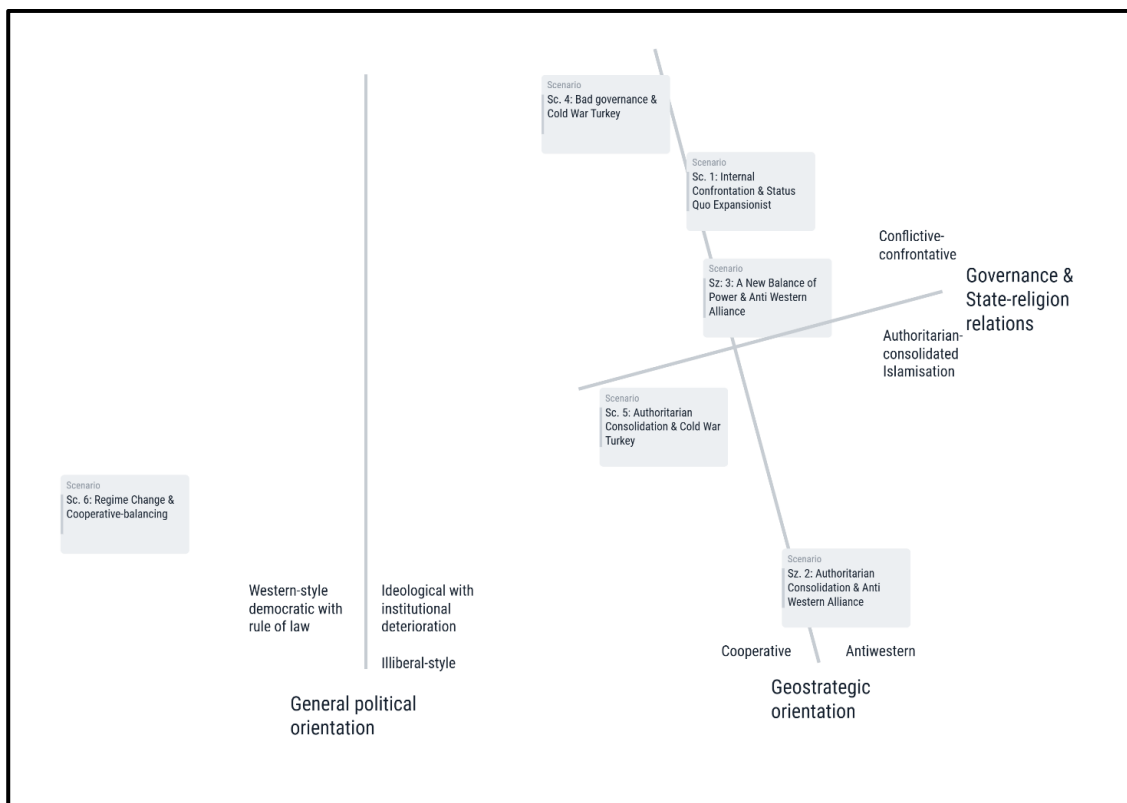
The figure below shows the formation of the corresponding clusters.



The individual points in the diagram represent projection bundles, i.e. future projections that have been assessed as consistent with the other future projections in the other projection bundles of the same cluster.

The coherent formulation of the individual projection bundles or raw scenarios then led to the actual scenarios.

In terms of their position on the aforementioned axes of autocracy/democracy, pro-/anti-Western orientation and degree of dominance of religious issues, the scenarios can be positioned on a map of the future as follows:



The strictly vertical line separates the scenario of a more democratic future for Turkey from the scenarios of an authoritarian future for the country. An oblique vertical axis separates scenarios of a pro- and anti-Western foreign policy orientation in Turkey. And an ascending horizontal line groups scenarios according to the extent to which the domestic political debate is about the place of religion in politics.

The individual scenarios are presented below.

3. The individual scenarios

3.1 Domestic confrontation and the pursuit of an expansionist foreign policy

This scenario takes place against the economic backdrop of a global recession. In Turkey, the global economic downturn is leading to an intensification of distributional struggles and increasing polarization along socio-economic and ideological fault lines. For the West, the economic crisis is also resulting in scarcer resources, which are no longer sufficient to win over emerging countries that, like Turkey, pursue a seesaw policy between East and West, or to keep them as allies.

Erdogan and his party, the AKP, emerged victorious from the presidential and parliamentary elections in May 2023 and were able to further cement their authoritarian rule. The ruling camp continues to pursue its policy of polarization, viewing only its own pious electorate and ethnic Turks as full citizens with all political, religious and cultural rights. Erdogan is sticking to his intolerant Kurdish policy. The constitutional court under his influence bans the legal pro-Kurdish party HDP (and later also its successor party DEM), which again drives young Kurds without prospects to the banned PKK, breathes new life into the organization and in this way keeps the vicious circle of violence and counter-violence alive.

Economically, the Turkish government primarily benefits from the exploitation of natural gas fields in the Black Sea (and the eastern Mediterranean), which allows the ruling AKP to continue its unorthodox economic policy (of low interest rates and cheap loans), benefiting in particular AKP-affiliated companies and industries, which in turn finance the party. The windfall also allows the government to distribute a limited amount of handouts to its voters. However, large-scale start-up financing of the economy, which would enable productivity-enhancing investments and thus lead to an increase in the general standard of living, is beyond the government's financial means.

However, the available funds are sufficient to further expand the country's booming arms sector. The defense sector offers high salaries, opportunities for advancement and prestige, but only at the cost of fully adopting the government's political orientation and religiously conservative cultural codes. The combination of limited opportunities and cultural selection is driving young, well-educated people out of the country in droves, particularly to Europe, the UK and the USA. In Turkey, immigrants from less developed countries are taking their places.

The EU's position in the world economy and, as a consequence, its role in global politics is steadily declining and the EU's influence on Turkish politics continues to wane. Although both sides are trying to avoid a further deterioration of their relations, neither of them can bring themselves to initiate a new institutional framework for mutual relations. Another factor contributing to the fragility of EU-Turkey relations is Ankara's consistently anti-Western tone in its foreign policy, its continued confrontational and expansionist regional policy and its disregard for the interests of Western actors. The Turkish government uses every opportunity to extract concessions from the EU and its member states, be it repeated announcements to open Turkey's borders to Europe for irregular migration; be it attempts to alienate the Turkish diaspora from their European host countries in religious and cultural terms and to align them politically against the respective governments.

Turkey's position in NATO is not unaffected by all of this. Within the alliance, Turkey is seen as the greatest challenge to its internal unity. Turkey is not thinking of leaving NATO. But Ankara complains loudly about the interference of NATO countries in its internal affairs and about how little NATO partners pay attention to Turkey's security interests. Thus, Ankara uses the advantages of membership in the alliance, but at the same

time focuses on the creation of a multipolar world and emphasizes that it would be better if the USA lost its dominant position in world affairs. It fits into this picture that the ruling party takes the liberty of increasing tensions with Greece whenever it feels weakened domestically.

In contrast, Ankara is further expanding its relations with Russia. Years ago, Turkey helped Russia to evade Western sanctions and strengthened its energy cooperation with Russia. Moscow has not only succeeded in gaining supremacy in the Black Sea, it has also established a permanent foothold in Syria and saved the regime of Bashar al-Assad, albeit at the cost of fragmenting the country's territory. To a certain extent intimidated by Russia's new strength, Turkey is continuing its cooperation with Moscow in the arms sector and has begun to jointly develop fighter jets with Russia. The Turkish government boasts to its own population that it has become a hub for the distribution of Russia's oil and gas.

3.2 Consolidation of authoritarian rule and formation of an anti-Western alliance

This scenario can be read as a continuation of current trends, such as the consolidation of authoritarian rule at home and the further alienation of the country from the West in terms of foreign policy. The two processes go hand in hand and reinforce each other.

Internally, the AKP succeeds in stabilizing itself in the next parliamentary and presidential elections in 2028, whether with Erdogan or with a younger successor. The opposition loses the parliamentary and presidential elections of 2023, its alliance disintegrates and it is unable to agree on a joint challenger to Erdogan/his successor in 2028 either, let alone develop a joint program.

The AKP, on the other hand, has succeeded in reversing the trend of decline in political institutions (such as the judiciary, education sector, central bank, etc.) and giving the country a sense of stability. This also contributes to the fact that the opposition does not pose a serious challenge to the ruling party and the de facto autocratic president.

Of course, stability is also based to a large extent on an effectively functioning repressive apparatus. Party and state overlap, and the leader of the ruling party is increasingly reminiscent of an absolute "leader". The "leader" enjoys strong support among large sections of the population. But regardless of this, the question of power does not arise because the regime has enough ways to manipulate the electorate in its favor.

Identity politics and political/cultural polarization are taking on unprecedented proportions for Turkey and the country is experiencing a gradual but ongoing process of Islamization from above, to which there is almost no resistance from the middle of society. The only exception is the Kurdish question, where the mutual turn to violence is reaching new heights.

However, the government's ability to stimulate the economy stands in sharp contrast to its effective control of the political opposition and social life. Turkey competes for exports and foreign investment almost exclusively on the basis of its low wage levels, and the country remains trapped in the so-called middle income trap. The continuing influx of refugees from the Middle East and Africa is not creating a shortage of cheap labor and is contributing to a lack of innovation and no noticeable increase in productivity. Turkey remains an economically peripheral country.

Turkey cannot get rid of its balance of payments deficit and is not in a position to reform its energy and industrial policy, switch to non-fossil energy sources and reduce its dependence on the export of expensive fossil fuels. Ankara can therefore neither keep pace with the EU's energy transformation nor free itself from its energy dependence on Russia.

The geopolitical background to this scenario is the unstoppable emergence of a multi- or bipolar world in which Russia and China have formed a comprehensive alliance against the West. Russia has managed to re-establish its great power status despite its war against Ukraine, and Moscow can act confidently towards Ankara. Constantly criticized by the Western media for its oppressive regime and confronted with declining Western willingness to invest, Turkey is increasingly aligning itself with the Russian-Chinese axis. Propaganda support for this foreign policy orientation comes from Turkish Eurasians, who play an influential role in the media despite their small numbers. Cooperation with Russia enables Turkey to further limit the room for maneuver of Western actors in its region. Turkey joins the SCO. Its relations with the EU and NATO degenerate into a series of crises. For Turkey, the EU only counts as a sales market and as a financier of refugee accommodation; otherwise, Ankara prefers to assert its interests in Europe in bilateral negotiations. Turkey's withdrawal from NATO is no longer considered out of the question.

In the Black Sea and the Caucasus, the question of power has been settled in Russia's favor. Because Turkey has resigned itself to its limited role there and concentrated on energy cooperation with Moscow, it is of little geostrategic value to the West. Once again, Western actors are asking themselves: Who is to blame for Turkey's turning away from the West?

Other developments in the region are also contributing to Ankara's alienation from the West. Syria remains divided into zones of influence or disintegrates. The Kurds are able to secure their self-administration because the USA is maintaining its presence in Syria and its cooperation with the Kurds in response to Ankara's rapprochement with Moscow. Turkey continues its attacks on the Kurdish self-administration in Syria and the PKK positions in northern Iraq, leading to renewed violence in Turkey and once again severely straining Turkish-US relations. All of this is a further incentive for Turkey to expand its arms industry as quickly as possible.

3.3 A new internal balance of power and the formation of an anti-Western alliance

This scenario postulates a restructuring of Turkey's domestic power structure, which, however, does not lead to a rapprochement with the West, but rather to a further alienation of the country from the West and does nothing to change the fact that Turkey continues to pursue a confrontational foreign policy towards Western actors for ideological reasons. A multi- or bipolar world and economic decline are also decisive framework conditions for this scenario.

Although the AKP is still the dominant force in the government, it shares its power with explicitly anti-Western circles, the so-called Eurasians. Rejection of the West characterizes the domestic political discourse and foreign policy strategy. The authoritarian regime is firmly in the saddle and has corrupted all state institutions. Neither the judiciary nor any other state institution acts even remotely independently of government directives or in contradiction to its interests. Corruption, nepotism and clientelism determine institutional action. Institutional effectiveness is exhausted by control, and the population's trust in state institutions is eroding.

A similar picture can also emerge if one or more opposition parties have taken over the government through elections, but find themselves confronted with institutions that have been under the control of the AKP (and MHP) for over twenty years and whose employees are allowing the new government's actions to come to nothing. Even ideologically cloaked distribution conflicts in a multi-party government of the former opposition can lead to the conditions described. In the event of such a mutual blockade between the parties, extreme nationalist and anti-Western circles can succeed in determining the public debate and the actions of

the institutions. *In fact, there is much to suggest that in such a combination, skepticism towards the West becomes the lowest common denominator for many actors.*

Turkey is not doing well economically. The education system is not very effective and Erdogan's unorthodox ideas on economic policy continue to dominate economic activity. Turkey's export successes are based on low wages and massive restrictions on employees' rights. Even in this scenario, Turkey remains trapped in the middle income trap, if it does not become a low-wage country. Public and private debt is growing and also represents a risk for European investors. Turkey's energy dependence on Russia intensifies, and energy transformation and a successful Green Deal are a long way off.

Ineffective economic policies and the deplorable state of institutions are reflected in impoverishment and increased social inequality. The middle class is shrinking, well-educated people are leaving the country. Social discontent is expressed in anger at migrants and anti-Western resentment. At the same time, Turkey's options for action with regard to migration are diminishing. Europe is sealing off its borders and turning back asylum seekers at the border is the norm. The extreme right and the extreme left converge in anger at the West and xenophobia.

The economic hopelessness is increasing tensions even within the respective political camps. In the authoritarian right, conflicts are arising between Islamists and nationalists. The radicalization of Islamist actors cannot be ruled out.

Turkey's intolerant nationalism on the part of the state and government is escalating the Kurdish conflict. Violent actions spread from the south-east of the country to other regions of Turkey, particularly the major cities.

In Syria, the fragmentation of the country is becoming more entrenched and Kurdish self-government can establish itself permanently, a nightmare for the Turkish nationalist mainstream. Damascus, Moscow and Tehran are increasingly questioning the Turkish occupation of parts of Syria.

The relationship with Europe is also characterized by conflict. Turkey is threatening to annex northern Cyprus and invade Greek islands in the Aegean Sea. Turkey's expansionist policy means that the EU is pursuing a policy of containment towards Turkey.

In response to such a Turkish policy, the USA and the EU agree on economic sanctions against Turkey and an end to arms policy cooperation, which also drives Turkey deeper into the arms of China and Russia in terms of defense policy. Even the country's economic ties with the EU are diminishing. Europe is also minimizing economic risk vis-à-vis Turkey.

Turkey's standing in NATO is declining to the point where its veto is overridden in decisions made by the alliance. Ankara becomes a member of the SCO and its withdrawal from NATO is now within the realm of possibility. Turkey's blockade of NATO is driving the EU to build its own security architecture, in which Turkey has no place.

Turkey is deepening its arms and security policy cooperation with Russia, which has managed to freeze the war in Ukraine to its satisfaction and is in a far stronger position in 2030 than the West had hoped for in 2022 at the start of the war. Factors in Russia's relative success are the re-election of Donald Trump in the USA and the pragmatic to opportunistic attitude of the countries of the Global South towards the war in Ukraine. The USA has lost its role as *the* superpower. While the political class of authoritarian states, including Turkey, has a strong common denominator in its rejection of participatory and democratic ideas, the relative economic decline of the West is leading to an intensification of domestic and foreign policy distribution conflicts. Regionalism and multipolarism dominate international politics, in which the UN leads a shadowy existence. Ankara's further rapprochement with Moscow is also reflected in the Black Sea, where Turkey is increasingly pulling in the same direction as Russia. Still heavily absorbed by the conflict in Ukraine, Russia is allowing

Turkey more influence in the region, which Turkey is using to strengthen its involvement in the Organization of Turkic States, in which it is the key player. In this way, Turkey has succeeded in increasing its strategic autonomy in foreign policy despite serious domestic and economic fragility.

3.4 Domestic political mismanagement with foreign policy integration into the West

After the world presented a confusing picture in the early 2020s, a clear bipolarity is emerging between the West on the one hand and China and Russia on the other. Gone is the period in which states signed cooperation agreements across system boundaries in one domain and were in conflict with each other in another. The marked separation of systems at a global level is now forcing states to align themselves with one or other of the leading powers. Although the economic side of globalization continues, supply chains, investments and internet services still function across system boundaries, cross-system political cooperation does not work in the fight against global warming, in the prevention of natural disasters, in the fight against pandemics or in migration management. The dominance of systemic competition is leading to a further decline in good governance in the so-called global South.

This also applies to Turkey. For better or worse, the Turkish government has opted for the Western camp, the USA, NATO and the EU. Ankara's rapprochement with China has stalled halfway. Turkey continues to cooperate economically with Russia, but on a strictly transactional basis. However, because the Turkish government does not feel committed to any international norms and expectations in its domestic policy, relations with the West remain tense. Corruption is omnipresent, and there is no rule of law, transparency or accountability of public institutions. This and the unpredictability of economic policy decisions, which repeatedly follow the particular interests of competing government elites, lead to continuing economic decline and a decline in public services. Trust in political processes and the hope of reforms to improve effectiveness have reached an all-time low.

The authoritarian leader is less and less successful in containing competing elites and Turkish politics is becoming increasingly fragmented. The failure of the leadership and political elites is giving free rein to the dominant cadres in the security bureaucracy, the so-called deep state, as well as mafia-like structures. The middle classes are becoming impoverished and the well-educated younger generation is emigrating. The social climate is brutalizing. The rejection/exclusion of migrants and Kurds is reaching new highs. The government is a long way from finding a political solution to the Kurdish question, but resources are too scarce for a major military effort in northern Syria.

This is all the more true as the Kurds in Syria have agreed on a modus vivendi with the Assad regime under Russia's guidance. The Gulf states have re-established diplomatic relations with Damascus, which has been readmitted to the Arab League. Turkey is facing Arab pressure to vacate the Syrian territories it occupies.

Contrary to what the West assumed and hoped for, its war against Ukraine has not weakened Russia as a foreign policy actor. Moscow has strengthened its presence in the eastern Mediterranean and is also asserting itself in the Black Sea. This has contributed to the fact that those cadres in the Turkish security bureaucracy who rely on cooperation with NATO and the West have prevailed.

However, this is not enough to thoroughly improve relations with the EU. Particularly in countries with high levels of migration from Turkey, Turkey's desire for greater participation or even membership in the EU is being rejected with reference to the human rights situation, but also with culturalist arguments. Nevertheless, Western loans and significant Western investments are once again flowing into Turkey.

3.5 Consolidation of authoritarian rule with foreign policy integration into the West

In this scenario, globalization is progressing, but political cooperation to contain its consequences for the environment remains just as unsuccessful as attempts to maintain or establish internationally binding political and social norms. Emerging countries and international corporations are taking advantage of this situation to compete with each other for raw materials and the exploitation of unregulated labor. The weakness of the West and the increasing lack of rules are accelerating the decline of democracies.

In Turkey, the defeat of the opposition in the parliamentary and presidential elections has led to the dissolution of the opposition alliance and the weakening of its parties. Political fatigue and frustration are setting in in Turkey.

The government seizes the opportunity to consolidate the one-person rule of the president. The party penetrates all institutions and hijacks the state. Regulatory institutions and the judiciary lose any semblance of independence. The government is serious about its vision of considering only the conservative Muslim and ethnic Turkish part of the population as the Turkish nation and is marginalizing the secular part of society. This is also expressed in the new constitution, which enshrines religiously conservative norms and values and declares the traditional family to be the only legitimate way of life. Religion is also used in dealings with the Kurds. The government cooperates with the Islamist Kurdish party and with traditional forms of religious self-organization (religious orders). The intolerant attitude towards the Kurdish self-administration in northern Syria continues.

The economic benefits that their mutual relationship brings to the EU and Turkey, and even more so the dwindling influence of Western actors worldwide, have meant that the undermining of the rule of law and the curtailment of democracy in Turkey no longer play a role in European-Turkish relations. However, particularly in EU countries with large Turkish migrant populations and continuing high levels of refugee influx, resistance to any form of political integration of Turkey into the EU is so great that there is no deepening of the institutionalization of relations. The Turkish government is exploiting the situation to accuse the EU of speaking with a forked tongue, of being Islamophobic and of rejecting Turkey on cultural grounds.

However, Turkey is not doing badly economically. The government has managed to complete major infrastructure projects such as the construction of ports, airports, highways and high-speed train lines. It has begun exploiting natural gas deposits in the Black Sea and the first nuclear power plant has started producing electricity. This makes the country interesting for Western investors but also for those from Japan, China and the Gulf States. The Turkish autocrat has enough resources at his disposal to satisfy his clientele and he has no trouble playing off competing elites and the small ethno-nationalist and Islamist parties that support his government against each other.

As far as Syria is concerned, the Gulf states, China, India, Brazil and South Africa have established diplomatic relations with the regime of Bashar al-Assad. Following the end of the war over Gaza, which ended with the extensive expulsion of the Palestinians, the Gulf states are returning to their policy of normalization with Israel. All of this increases the pressure on Turkey to withdraw its troops from Syria.

Russia has proved surprisingly resilient in its war in Ukraine. Under its leadership, the Kurds of Syria and the Assad regime have reached a compromise. Russia has established itself militarily in Syria, in the Mediterranean and in North Africa, particularly in Egypt. In its reassessment of the security situation, Ankara has therefore come to the conclusion that it needs to reaffirm its ties to the USA and NATO. The pursuit of foreign policy autonomy was not crowned with success. The Arab uprisings, in which Turkey had invested a great

deal of energy and hope, have fizzled out. Turkey is still without a reliable partner in the eastern Mediterranean. It is also confronted with the fact that China, Russia and Iran are cooperating more closely in terms of security policy, and Turkey's coffers are tight due to the earthquakes. Ankara is therefore once again seeking to close ranks with the unloved West, as it did during the Cold War.

3.6 Awakening of the authoritarian regime and partial cooperation with the West

To a certain extent, this scenario is the major exception among all scenarios. It is based on the assumption that there will be positive developments on a global level, which will also reinforce positive developments in Turkey and its region. On a global scale, the liberal states succeed in asserting themselves economically, even taking the lead again in some areas. International trade is growing and the world is experiencing a new round of global agreements to regulate it. International cooperation in the fight against pandemics, global warming and poverty is accelerating. Both the war in Ukraine and the war in Gaza have ended through negotiated peace. China and the USA have staked their claims by mutual agreement and are cooperating on global challenges.

A process of renewed democratization has begun in Turkey. The country has either returned to parliamentarism or has eliminated the excesses of its presidential system and restored regulatory institutions. This also applies to the judiciary, which is increasingly able to act independently of the government. In society as a whole, the ethno-cultural differences in the population, which determined the political positioning of individuals for decades, have lost their political significance. Citizens are increasingly positioning themselves politically in relation to their social, economic and other interests, and society has reached a consensus on issues such as fundamental legal equality, secularism and the rule of law. Its victory in the local elections has encouraged the opposition to cooperate on fundamental issues of democracy, the rule of law and rational economic policy, and the 2028 general elections will bring the AKP's rule to an end.

The consensus on the principle of legal equality of all population groups has also made it possible to take steps towards a political solution to the Kurdish question. The de-escalation of the Kurdish conflict in Turkey has enabled Ankara to come to terms with Kurdish self-administration in Syria.

Russia is emerging weakened from the war in Ukraine and the USA and China are de-escalating their conflict for global supremacy. The atmosphere of relative *détente* allows Turkey to position itself according to its economic interests in foreign policy, which is why it sees the USA and the EU as its strategic partners. Ankara coexists with Russia on a transactional basis. Now that Turkey's political culture is moving towards a democratic political process, participation, consensus and compromise, the new government no longer perceives the EU's normative expectations as undermining its power.

Turkey's new image is having a positive impact on the investment decisions of Western economic players. Turkey itself is no longer channelling inflowing capital into gigantic infrastructure projects, but rather into the modernization and digitalization of industrial production and services. In this climate, the tone of Turkish foreign policy is also changing. Although the conflicts with Greece and the Republic of Cyprus remain unresolved, they are no longer at the top of the list of priorities and the parties to the conflict have agreed to resolve them without violence. Turkey is now also seeking cooperation with the West with regard to Syria. Ankara's most important concerns there are the prevention of further large-scale refugee flows and the resettlement of at least some of the Syrian refugees within the framework of international law and with the financial support of the EU, which must reconsider its position in this regard.

4. Assessment of the probability of occurrence of the individual scenarios

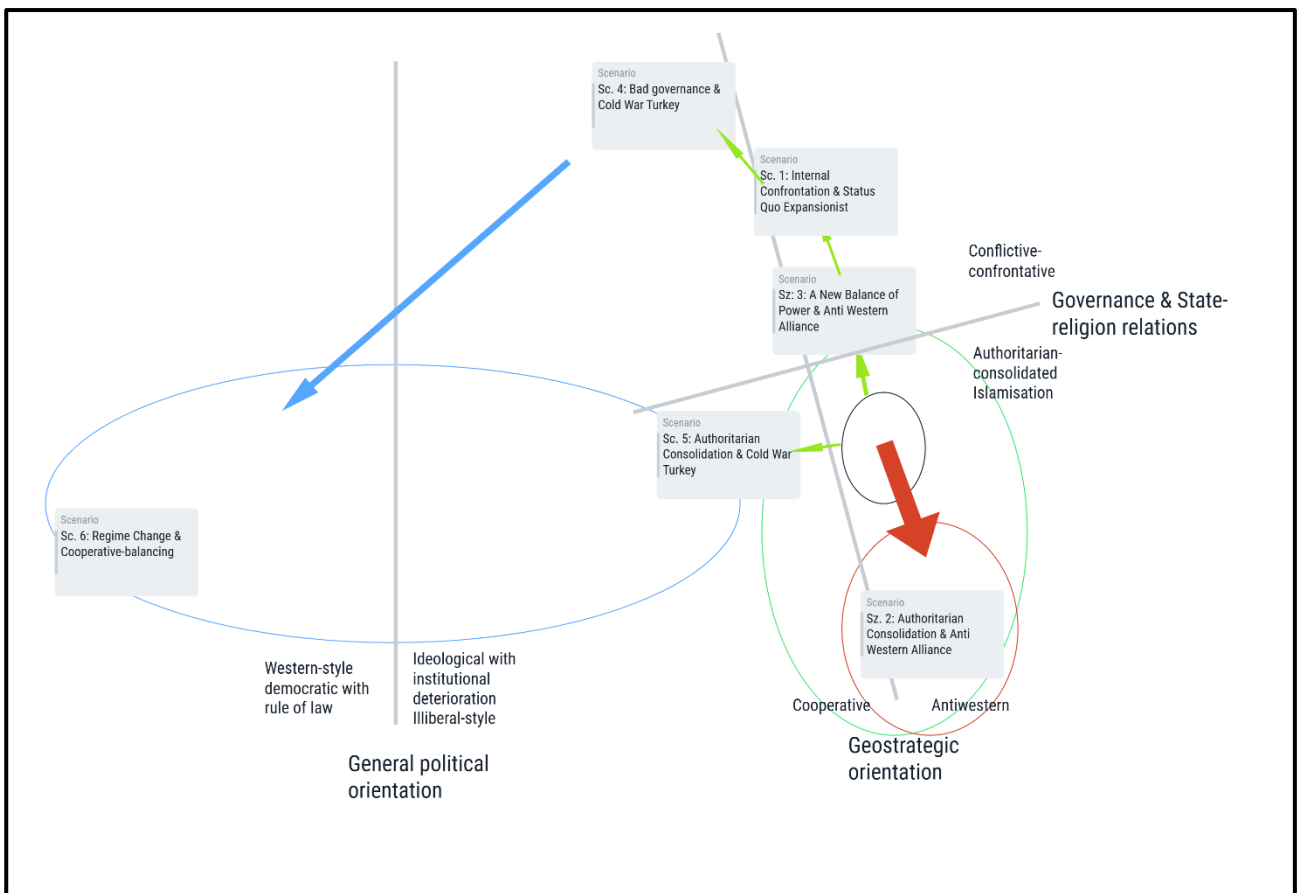
Although they indicate partially contradictory developments, all scenarios are possible in principle. They are all based on non-contradictory, non-mutually exclusive projections of the future made for analytical purposes and based on isolated key factors that will have a decisive influence on the country's development.

The fourth and final step consisted of the expert group discussing which scenario was most likely to materialize against the backdrop of the political dynamics prevailing in spring 2024.

Assumptions about Turkey's development toward further expansion of authoritarian rule or toward re-democratization can be made even without developing scenarios. However, only the development of coherent scenarios forces the expert group to consider the assumptions about the development of all key factors associated with a scenario and to take them into account in the subsequent risk analysis.

The assessment of the expert group led to the following concretization of the

Map of the future



The small black circle represents the so-called *present space*, from which all of Turkey's development options (concretized by the six scenarios) were theoretically conceivable in spring 2024.

The blue arrow points to the desirable development of Turkey for Western actors in the direction of scenario 3.6 entitled 'Awakening of the authoritarian regime and partial cooperation with the West'.

However, developments in the country were closer to the other five scenarios, all of which are characterized by the further decline of democratic norms and practices and geopolitical distance, if not antagonism, towards the West. There is much to suggest that Turkey's future will move within the green circle in the coming years, and the most likely course of events is scenario no. 3.2 'Consolidation of authoritarian rule and formation of an anti-Western alliance' in the red circle, which is why the red arrow indicates the current trend in Turkish politics in spring 2024.

In detail, the development was as follows:

The ruling AKP and the far-right and Islamist parties allied with it won the parliamentary and presidential elections in May 2023 - albeit narrowly - and can consolidate their grip on state institutions, including the judiciary.

However, her victory in the local elections at the end of March 2024 gave the social democratic Republican People's Party (CHP) a huge boost and meant that the country's economic and cultural centers will be administered by her from now on. The opposition leader has managed to win over a large proportion of voters from the other opposition parties following the collapse of her alliance with five smaller opposition parties, which was still competing against the government in May 2023. 1.5 million voters who voted for the AKP in the parliamentary elections voted for the main opposition party this time.

Of course, this does not mean that society as a whole has shifted towards more democracy, transparency and pluralism. This is because the CHP's success is only due to a limited extent to the fact that parts of the AKP electorate have switched to it. The Republican People's Party won the local elections primarily because the AKP was weakened by the fact that some of its voters opted for Islamist parties, which could join forces with the government again at any time, and because another part of the government's supporters stayed at home on election day. Erdogan is therefore right to a certain extent when he says that the result is not yet a defeat for the AKP but must be seen by his party as a necessary "turning point" for its policies.

Nevertheless, the psychological momentum of the victory in the local elections and the fact that the CHP's material resources will increase noticeably with the takeover of many large city administrations will increase the opposition's political influence.

As far as the ruling party is concerned, there are no signs so far that the election result will lead to a turnaround towards compromise and balance or even democratizing reforms. This is shown, among other things, by the recent sentences against Kurdish politicians. Instead, the government is continuing its efforts to change the constitution so that it can hold on to power in the future without the support of the majority of the population. Moderate voices within the AKP calling for an end to cooperation with the far-right Nationalist Movement Party (MHP) have so far gone unheard.

Four years without elections ahead of it, the government is now embarking on an austerity program that seems inevitable from an economic perspective. Any protests will be met with increased repression and most likely with a new version of the familiar political strategy, which consists of polarizing society along ethnic and cultural divides at home and provoking crises and tensions in foreign policy.

In fact, despite partial cooperation with Athens, Ankara is sticking to its confrontational positions towards Greece and Cyprus and is stepping up its military action in Iraq and northern Syria. The Turkish government insists to the EU that Turkey's strategic importance, and not criteria such as the rule of law and transparency, should be the basis for its membership of the European Union.

There is therefore much to be said for a further expansion of the authoritarian regime, which at the same time faces a stronger domestic opposition, which admittedly lacks effective political instruments and has no real alternative vision in terms of foreign policy, so that a continuation of the previous foreign policy can be expected, which often does not go hand in hand with Western interests. Future developments therefore appear to be somewhere between scenario no. 3 'A new domestic balance of power and the formation of an anti-Western alliance' and no. 2 'Consolidation of authoritarian rule and the formation of an anti-Western alliance'.

Since then, the geopolitical conditions have changed dramatically in just six months. The course of the war in Ukraine, which could not have been more unfavorable for Kiev and European capitals, the re-election of Donald Trump as US president, and the U-turn in US policy — Washington's rapprochement with Moscow and the questioning or even termination of US security guarantees for European NATO members — have led to a feeling of direct threat in Europe and to a primacy of security and defense policy. The new world situation is forcing not only the European Union but also Turkey to rethink its previous policy.

This global upheaval brings to the fore another scenario developed in the exercise for the future of European-Turkish relations. The working group had casually referred to it as "Cold War Turkey": authoritarian consolidation at home and, at the same time, a strengthening of the security partnership with the West.

For whatever reason, no one in Turkey or Europe had expected such a radical change in US policy in the spring of 2024.

Nevertheless, the development of scenarios at that time already made it possible to consider a possible scenario for European-Turkish relations that largely corresponds to the current framework conditions for European-Turkish relations, which are determined by security and defense policy and a new perception of threats. As described in the "Cold War Turkey" scenario, Turkey is now looking more to Europe for security reasons. It fears a resurgent Russia, which it has faced in recent years in Syria, Libya, the South Caucasus, and Central Asia as a competitor or even an antagonist, and at whose expense it has been able to expand its influence in all these regions. At the same time, Donald Trump's presidency renders NATO's security guarantees for Turkey as null and void as they are for NATO members of the European Union. However, it was largely NATO's reassurance that allowed Ankara to stand on equal footing with Moscow in recent years and challenge Russia in many areas.

The value of scenarios lies primarily in drawing decision-makers' attention to unrecognized but possible political constellations and the challenges they present. The "Cold War Turkey" scenario does this, and the fact that the political processes that have led to Russia being perceived as a threat in Turkey again today are in reality of a different nature than those described in the Cold War Turkey scenario does little to detract from its usefulness for political considerations. As the current example shows, it is essential to develop alternative visions of the possible future and to prepare for them, at least mentally.

5. Risks for German and European policy

5.1 The list of potential risks

First, a list of potential risks was drawn up and assigned to specific policy areas:

They identify risks in their policy areas:

Germany's policy in and towards the European Union

- Undermining the EU's soft power
- Obstruction of the EU's Syria policy
- Obstruction of the EU's Russia policy
- Turkish policy in the Eastern Mediterranean poses a threat to Germany's energy security
- Final division of Cyprus
- Refusal of any cooperation with the EU
- Turkey as the primary obstacle to a common arms export policy
- Breaking off cooperation with the EU on migration policy and instrumentalizing refugee movements to blackmail the EU and/or its member states

Germany's policy in and towards NATO

- Turkey as sand in NATO's gears
- Preventing closer cooperation between NATO and the EU over Cyprus

Germany's bilateral policy towards Turkey

- Economic policy
 - Cost increase of imports of Turkish semi-finished products by CBAMs as Turkey does not keep pace with the Green Deal, endangering supply chains from Turkey
 - Lack of legal certainty for German companies in Turkey and systematic discrimination against non-Turkish companies in public tenders
- Migration policy
 - Increase in the number of asylum seekers from Turkey (political refugees, especially of Alevi and Kurdish origin).

German domestic policy

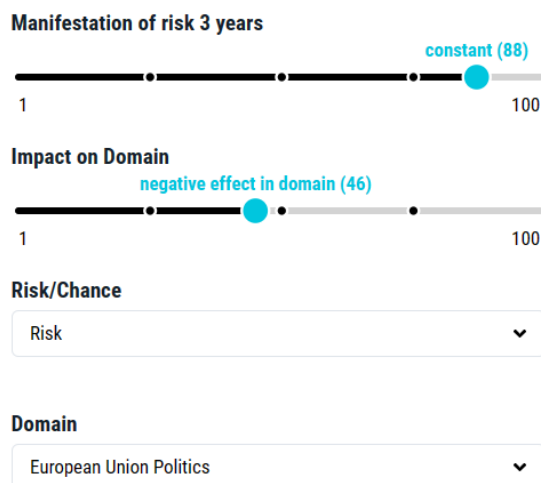
- Integration policy

- Ankara is increasing polarization within the 'Turkish community' in Germany and alienating its national-conservative mainstream from the German majority society
 - Strengthening Ankara's control over DITIB and other religious and ultra-nationalist associations and parties in Germany and their instrumentalization for the AKP's foreign policy goals
 - Exacerbation of the stigmatization of the Turkish diaspora by the majority society as a result of Erdogan's policies and reinforcement of right-wing populist discourses and strategies in
- Security policy
 - Expansion of Turkey's intelligence activities in Germany through MIT agents and the recruitment of undercover agents
 - Violent clashes between Turks and Kurds in Germany
 - Terrorist attacks
 - Increased demonstrations and political mobilization

5.2 Risk assessment

The identified risks were then assessed according to their persistence over the next three years and the scale of the challenge they pose for the policy area to which they belong.

Example for the assessment of risks



The degree of influence of a risk varies from 'low', to 'perceptible', to 'danger to the scope for action in a policy area', to 'danger to the political system' in Germany.

At the time level, the following benchmarks are used: 'possible future risk', 'risk that has already occurred', 'risk that occurs at regular intervals' and 'permanent risk'.

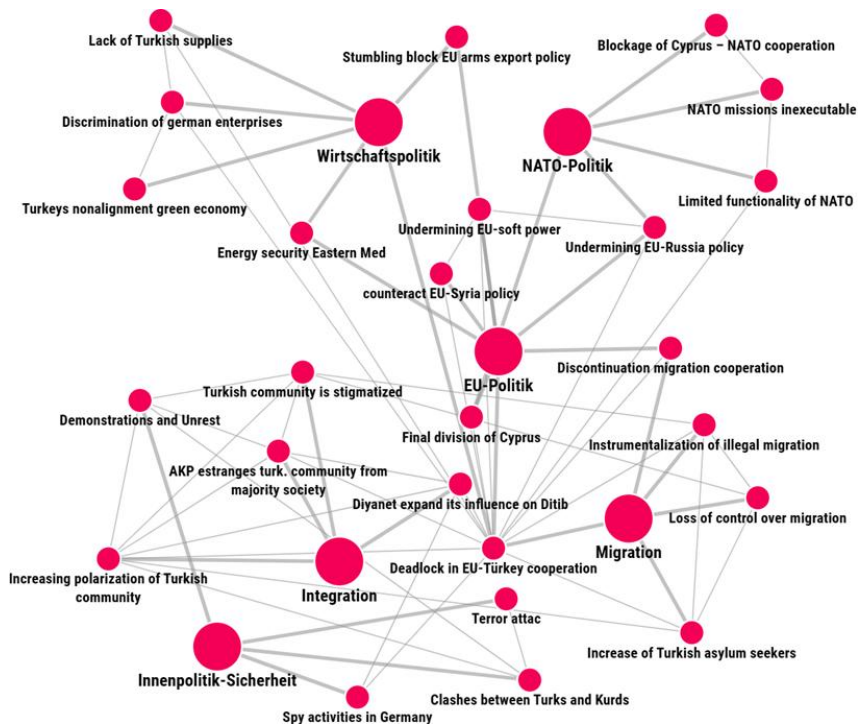
The result can be illustrated graphically as follows:



It can be seen that nine risks were assessed as relatively permanent *and* as having a relatively high impact on the policy area to which they belong. In the graph, these risks form an ellipse that lies across the border of the red and beige fields. It is these risks to which German policy must primarily relate in its actions towards Turkey.

Overall, however, Turkey *does not pose a threat to the functionality of the overall German political system*. However, there are risks whose occurrence can have considerable negative effects in the respective policy areas.

The classification can be represented graphically as follows:



5.3 Description of individual key risks and recommendations for action

5.3.1 Germany's policy within and towards the European Union

Undermining the EU's soft power

The risk is better described by the wording:

"Undermining the reputation and credibility of Western states"

Turkey's self-confident and confrontational stance towards the West in recent years has earned Ankara a reputation in Africa and the Middle East as a Muslim country capable of defying Western expectations and representing the interests of disadvantaged countries. In this respect, Turkey has distinguished itself with four discourses:

- a. it campaigns for the rights of Palestinians and Palestine
- b. it stands in the way of Islamophobia
- c. it takes a stand against western colonialism and
- d. it criticizes the international order dominated by the West.

These discourses are having an impact both in Turkey (and the Turkish and Muslim diaspora) and at international level. They strengthen an already widespread skepticism and dissatisfaction towards Western countries. They increase Ankara's reputation and influence regardless of the fact that Turkey itself sometimes acts as a new hegemon and derives economic benefits from its position.

Admittedly, the government's inability to end the economic crisis or at least mitigate its consequences for large sections of the population is now diminishing the domestic political persuasiveness of this rhetoric. In

addition, the government's recent crackdown on the main opposition party, in particular the arrest of the popular Istanbul mayor Ekrem Imamoglu, President Erdogan's strongest challenger, has further deepened the economic crisis. International capital is leaving Turkey, even Turkish companies are increasingly investing abroad, and savers are once again fleeing the Turkish lira. According to recent polls, the majority of the population now holds the government responsible for the deterioration of their situation.

In the field of foreign policy, too, the anti-Western discourse is losing its persuasiveness. One reason for this is the division within the Western bloc that has become apparent with Donald Trump's return to the White House and his confrontational policy toward Western partners. "The West as we knew it no longer exists," said European Commission President Ursula von der Leyen, for example. Ankara's inability to counter Israel's policies in Gaza, the West Bank, Lebanon, and, in recent months, Syria undermines the Turkish government's propaganda portraying Turkey as a key player in the region and a protector of Muslims, especially Palestinians.

In order to *prevent further undermining of Western credibility*, the German government should

- take note of the widespread anti-Western rhetoric and anti-Western sentiment in the countries of the Global South in all its ramifications
- strive for greater consistency between its foreign policy discourse on values and its political actions
- Take note of the now well-documented loss of credibility of German politics and the accompanying decline in German soft power caused by Germany's long-standing, almost unconditional solidarity with the right-wing extremist Israeli government and its warfare in Gaza, as well as Germany's relativization of the rulings of the International Criminal Court.
- Guarantee freedom of expression and the exercise of political rights in domestic policy without distinction and regardless of whether these rights are exercised in accordance with government policy. Examples of how this has only been done to a limited extent are the restrictions on freedom of expression at pro-Palestinian demonstrations, which have now been criticized by the Council of Europe, and the prejudicial and stereotypical criticism of the founding of the so-called migrant party "Dava" in Germany.

[Obstruction of the EU's Syria policy](#)

On December 8, 2024, the Assad regime was overthrown by a rebel alliance led by the Islamist militia Hay'at Tahrir al-Sham (HTS). This new beginning offers at least a chance to restore Syria's territorial integrity and sovereignty. The EU must have an interest in a stable Syrian state and the inclusion of all sections of the population in future political decision-making processes. Despite serious concerns about the Islamist past, the EU has so far taken a pragmatic approach to the new rulers in Damascus. Brussels has gradually and reversibly eased some of its sectoral sanctions (in the energy, banking, and transport sectors).

However, cooperation between Brussels and Damascus is built on shaky ground, as Syria's new government needs to consolidate its power and is relying on loyal Islamist groups to do so. The inclusion of non-Muslim and non-Sunni minorities (Alawites, Druze, and Christians) has so far been limited to the individual level. The retention of Islamic law as the basis for legislation is particularly rejected by secular and non-Muslim minorities. In addition, there has been sectarian violence, including against Alawites in March and, most recently, against Druze in the south of the country. Furthermore, a significant portion of Syria's oil and gas resources

are located in areas controlled by the Kurdish-dominated Syrian Democratic Forces (SDF). Like the EU, Turkey is interested in stabilizing and rebuilding Syria. Brussels and Ankara emphasize Syria's ethnic and religious diversity. However, Ankara insists on a strictly centralized state structure and rejects a federal system with extensive Kurdish autonomy, as demanded by the French government, for example. In addition, Turkey is trying to bring the Syrian security sector under its control, which is meeting with strong resistance in Israel. The conflict between Ankara and Tel Aviv harbors considerable potential for tension.

In order to exert any influence in Syria at all, the EU would have to take note of the

- recognize the changed (power) relations in Syria
- develop a coherent Syria policy and
- explore the possibilities for cooperation with Turkey.

Steps in this direction would include:

- bringing together the dossiers on refugees, Kurdish autonomy, the future of the American presence in the region, and the territorial integrity and stability of Syria
- the gradual easing of sanctions to improve economic conditions
- clarifying priorities among the various objectives of European policy toward Syria, such as limiting migration, ensuring minimum standards in the treatment of refugees, repatriating refugees, preserving Syria's territorial integrity, preventing the monopolization of political power by the new rulers and the associated marginalization of minorities, and reducing tensions between Turkey and Israel in Syria
- Preventing forced resettlement and expulsion, as well as further Turkish attacks on the vital infrastructure of the Kurds in the northeast of the country

[Obstruction of the EU's Russia policy](#)

The risk is better described by the following wording

"Obstruction of the European Union's policy toward Russia"

While the EU is engaging with Russia at massive economic and political cost to Ukraine, Turkey has pursued exclusively its own economic and security interests since the start of the Russian attack. Ankara did condemn the Russian invasion and annexation of Crimea and four other Ukrainian regions. However, Ankara believes that the West, especially the US, bears some of the blame for the outbreak of war because Moscow provoked it and its security interests were violated. Turkey is not participating in the EU sanctions, nor is it joining the sanctions imposed on Russia by all other NATO countries. The country has become Russia's economic corridor to the West, through which goods important for the war are also transported to Russia. On the other hand, Turkey has ramped up its energy imports from Russia, enabling Moscow to generate more income. At the same time, Turkey is selling arms to Kiev.

Only threats of secondary sanctions by the US have led Turkish banks to restrict financial transactions with Russia.

Like many other countries that can be described as emerging middle powers, Turkey is striving to free itself from long-standing dependencies and expand its foreign policy leeway. Given Turkey's economic dependence on the EU and its military and security ties to the US, this has amounted to a policy of greater independence from Western powers. Like the BRICS countries, Turkey saw the confrontation between "the West" and Russia, and to a lesser extent China, as an opportunity to maneuver between the blocs and pursue its objective interest in establishing a multipolar international order. Structurally, Turkey was in a particularly favorable position. Its strong economic ties with Europe secured it privileged access to one of the largest markets; its membership in NATO allowed it not only to meet Russia on equal terms, but also to confront Moscow in Syria, Libya, and the Caucasus. At the same time, its military strength and central strategic location made it a partner that was difficult for the West to do without, whose divergent interests had to be taken into account.

The erratic and unpredictable policies of the new US administration have also fundamentally changed the situation for Turkey. On the one hand, Ankara can only congratulate itself on having primarily pursued its own energy, trade, and foreign policy interests during the year of the Ukraine war and, where possible, having achieved them. Given Trump's rapprochement with Putin and the accompanying security policy divide within the West, Ankara does not have to pay any price for its self-serving policies. On the other hand, Turkey is confronted with the possibility of a Russia that is largely victorious in Ukraine and strengthened militarily and in global politics, which could be tempted to regain lost ground in North Africa, the Caucasus, and the Middle East at Ankara's expense.

Until Donald Trump took office, Turkey was in the luxurious position of a player that derived guarantees for its own security from the entrenched confrontation between two blocs and also generated freedom of action for itself. However, Trump's policy of questioning NATO and its guarantee of assistance, his unpredictable and potentially interventionist and expansionist policy in the Middle East (Gaza, Iran) policy, and the possible strengthening of Russia mean that Ankara now faces two potentially revanchist great powers in its region and that the European states, as the necessary defenders of the status quo, are gaining security policy relevance that they did not previously have for Ankara.

In the new global situation, which is characterized by extreme volatility, Germany and the EU should

- closely monitor the Turkish security policy debate and, in particular, take note of the risks and threats that Turkey perceives to its country from the US and Israel on the one hand and from Russia and Iran on the other.
- , consider Turkey as a state that currently has a primary interest in maintaining the status quo and a minimum level of rules and predictability
- expand economic, security, and defense cooperation with Ankara in order to make Europe, including Turkey, a security actor in its own right
- strictly separate the strengthening of economic and security cooperation with Ankara from the process of Turkish membership in the EU
- should give new validity to the principle of non-interference in the internal affairs of partners for both sides.

Turkish policy in the Eastern Mediterranean poses a threat to Germany's energy security

Germany has committed itself to an energy transition in which green hydrogen plays a decisive role in the orientation towards renewable energies. The countries of North Africa, particularly Egypt, but also Turkey, are named as promising potential suppliers. However, due to new discoveries of exploitable maritime natural gas fields, the countries bordering the eastern Mediterranean are also potential suppliers of natural gas, which is seen as a bridging technology/transitional solution in the energy transition. However, the economic use of both natural gas and green hydrogen depends on a climate of security and cooperation in the Eastern Mediterranean, without which neither the necessary network of pipelines can be established nor will it be possible to merge the electricity grids.

Even though Israel's war in Gaza dominates regional politics today, it was Turkey that isolated itself from almost all neighboring states (Israel, Greece, the Republic of Cyprus, Egypt) and excluded itself from regional energy cooperation due to its confrontational policy. Turkey does not recognize the Republic of Cyprus (RoC) and opposes the Exclusive Economic Zone agreements that the RoC and Greece have concluded with Egypt and the RoC with Israel. Ankara is also objecting to the construction of two interconnectors in the eastern Mediterranean, which are to link the electricity grids of Israel, the RZ and Greece as well as Egypt and Greece (and therefore the EU).

In order to *harness the energy policy potential of the Eastern Mediterranean for Germany and Europe*, Turkey's resistance must be overcome, its isolation in the region overcome and Ankara integrated into European energy policy.

Steps in this direction are:

- the expansion of the feasibility studies on the EU's cooperation with Egypt in the production of green hydrogen with regard to the integration of Turkey
- support for Turkey's membership of the EastMed Gas Forum. (EMGF)
- EU initiatives to clarify the parameters for the establishment of Exclusive Economic Zones in the Aegean and Eastern Mediterranean
- Continuation of the European policy of de-escalation and condemnation of the use of military means to resolve conflicts.

Final division of Cyprus

Since the election of right-wing nationalist politician Erol Tatar as "President of the Turkish Republic of Northern Cyprus" (TRNC), the government of the small state, which is only recognized by Ankara, has insisted on international recognition and thus on the same status as the internationally recognized Republic of Cyprus (RC). In line with Ankara, which promoted Tatar's election through partly illegal intervention in the political process of the TRNC, Northern Cyprus refuses to engage in new talks on the reunification of the two halves of the island in a bicomunal and bizonal federation, as envisaged by the resolutions of the UN Security Council and the European Council.

In international forums such as the Organization of Turkic States (OTS) and the Organization of Islamic Cooperation (OIC), Turkey has been drumming up support for the recognition of the TRNC, but so far without success.

These efforts by Ankara suffered a setback in early April 2025 when Uzbekistan, Kazakhstan, and Turkmenistan announced their intention to establish diplomatic relations with the TRNC following the first EU-Central Asia Summit. Regardless, Turkey is strengthening its military presence in the TRNC. President Erdogan has had a new presidential palace built for his Turkish Cypriot counterpart and has declared his unconditional support for giving Islam a greater role in the TRNC's education system.

Given Ankara's close ties with countries such as Azerbaijan and Pakistan and the declining influence of the Western world on the global stage, recognition of the TRNC by third countries cannot be ruled out. For the EU, which considers the entire island to be the territory of its member state and thus part of the community (officially, the validity of the *acquis communautaire* in Northern Cyprus is only temporarily suspended), this would not only be a diplomatic snub and an admission of its foreign policy insignificance, but also a deep rift in its relationship with Turkey.

In order to avert such a development and achieve the start of constructive talks,

- a sustained initiative by Germany for a greater and more decisive role for the EU in future talks on the reunification of the island
- continuous and public political pressure on the RZ to flesh out the principle of political equality between the two major ethnic groups (Greeks and Turks), which is a prerequisite for a federal solution
- a renewed initiative to establish direct trade between the TRNC and the EU, which has so far been blocked by the TR, a measure that would raise prosperity in the TRNC and reorient the population there toward reunification and EU membership
- Intra-European preparation of the EU's economic and diplomatic response to further Turkish steps toward the final division of the island.

Refusal of any cooperation with the EU

Among the EU member states, Germany is the one with the closest and most diverse relations with Turkey and is therefore the most exposed to potential negative developments in the country's relations with the EU. Germany's interdependence with Turkey affects the security of supply chains, Germany's internal peace through its relationship with the Turkish and Muslim populations, and its ability to control irregular migration. Russia's war against Ukraine further increases Ankara's importance for Berlin, as it confronts Germany with great expectations from the other member states regarding economic and military burden-sharing in support of Ukraine and Turkey plays a decisive role in the development of the conflict.

Turkey's significance for Germany was certainly one reason why Berlin has tried to play a mediating role in the Turkish-Greek conflict in recent years and protect Ankara from harsh reactions from the EU. However, the further the decline of democracy in Turkey progresses and the more confrontational Turkey becomes towards Western states, the more difficult it becomes for the German government to convince its own population and other members of the EU (especially France, Greece and the RZ) to continue a delicate balance between a values-based and a pragmatic Turkey policy.

In order to prevent the EU's structural conflicts with Turkey from escalating and to maintain cooperation, the German government can:

- work towards strengthening Turkish-European cooperation in areas such as military and cyber security, energy security, climate change and green transition
- Promote the institutionalization of cooperation by establishing agreed standards
- promote consensus within the EU on the conditionalities of cooperation with Turkey and the conditions and mechanisms for any necessary changes of course.

Turkey as the primary obstacle to a common arms export policy in the EU

(Although the risk was mentioned in the analysis, it was not classified as serious. Nevertheless, it is mentioned here because the topic is repeatedly the subject of controversial debate both in public and in politics and influences the mood in bilateral relations).

The measures taken by the Turkish government following the suppression of the attempted coup in 2016, in particular the declaration of a state of emergency and the suspension of fundamental rights and freedoms, but also the Turkish invasions of northern Syria that began in the same year, led to Germany (and Sweden) almost completely cutting back on arms exports to Turkey. At the time, German policy was in line with the mood among the population and in the European Parliament. By contrast, other EU member states, in particular Spain and Italy, continued their arms cooperation with Turkey unchanged. Turkey's desire to purchase Eurofighters produced jointly by Germany, France and Spain put the issue back on the agenda. Shortly beforehand, the German government had given the green light for the delivery of Eurofighters to Saudi Arabia. In fact, Turkey is the most divisive potential recipient country of armaments within the EU. The differences in their arms export policies also affect cooperation between France and Germany in this area.

In order to make the EU capable of acting on this issue, but also to avoid isolating Germany within the EU, the Federal Government should

- formulate a critical assessment of the impact of its partly cautious, partly permissive (see submarine concession) arms export policy towards Turkey on Ankara's political actions and also analyze the dynamics of Turkish arms production and the diversification of Turkish arms imports as well as the consequences of these developments.
- the finding of a common line with other EU states and in particular with co-producers of military equipment should take precedence over the respective concrete supply decisions, as individual arms export restrictions have no effect
- take human rights and international law conditions into account wherever possible when deciding on arms exports and production cooperation.
- Resumption of cooperation in the defense industry, e.g. delivery of Eurofighters with the strict condition that the protection of human rights (of the Kurds) is violated ?????
- Inclusion of Turkey in international armaments cooperation within the framework of NATO's European pillar ????

Breaking off cooperation with the EU on migration policy and instrumentalizing refugee movements to blackmail the EU and/or its member states

Germany is the primary destination country for irregular migration movements to Western Europe. It is therefore no coincidence that the agreements on limiting the number of refugees that Brussels concluded with Turkey in 2015 came about on Berlin's initiative and guidance. Since 2011, the EU has supported Turkey with around ten trillion euros to take in refugees from Syria, thereby significantly reducing immigration pressure on Europe. In February 2020, however, the Turkish government not only opened the borders to Europe for refugees, but also actively supported migrants in crossing the Greek borders. The aim was to persuade the EU to provide diplomatic and possibly military support for Turkey's policy in Syria. A year later, in 2021, the Turkish state airline Turkish Airlines brought large numbers of irregular migrants to Belarus, from where they wanted to cross the border to Poland with the help of Belarusian authorities. In 2022 and 2023, Turkey attempted to destabilize the Republic of Cyprus by allowing large numbers of refugees to travel to the Turkish Republic of Northern Cyprus, from where they illegally crossed the Green Border into the Republic of Cyprus. It is therefore possible that Turkey will once again use refugees as a means of exerting pressure on the EU and/or its member states at any time. This is all the more the case as the Turkish population now has a predominantly negative attitude towards the stay of refugees in Turkey and the Turkish government accuses the EU of only partially fulfilling its obligations under the refugee agreement.

The German government has two alternative strategies at its disposal. One aims to *ensure Turkey's continued cooperation as far as possible*, while the second would be aimed at *freeing itself at least to some extent from its dependence on Ankara*.

Turkey's willingness to cooperate can be promoted by the fact that

- European financial benefits - as demanded by the Turkish government - flow directly to the government and not in the form of project financing to the - often foreign - project sponsors.
- European financial benefits are increased and promised for a longer period of time
- the EU participates (financially and/or organizationally) in Turkey's measures to repatriate refugees to Syria
- the EU agrees to facilitate or promote the import of Turkish products produced in special economic zones where a certain percentage of Syrian refugees are employed.

Ways to reduce dependence on Turkey in the refugee issue or to increase the price that Turkey pays for breaking agreements would be

- Measures against Turkish Airlines or other Turkish companies transporting irregular refugees
- the further reduction of visas issued to Turkish citizens
- more effective border controls and a restrictive reinterpretation of the Refugee Convention and the simultaneous establishment of quotas for the admission of refugees
- the termination or discontinuation of the refugee agreement.

Turkey as a highly controversial partner in the new European security policy

The measures taken by the Turkish government after the suppression of the 2016 coup attempt, in particular the declaration of a state of emergency and the suspension of fundamental rights and freedoms, but also the Turkish invasions of northern Syria that began in the same year, led Germany (and Sweden) to almost completely halt arms exports to Turkey. At the time, Berlin's policy was in line with the mood of the German population and the European Parliament.

Russia's war against Ukraine and, even more so, the radical shift in US policy from supporting Ukrainian membership in NATO to condemning Ukraine's self-defense as warmongering have dramatically revealed to Europeans the limits of their own defense capabilities. In this new threat scenario, Turkey went from being a country that Germany wanted to sanction for its autocratic tendencies at home and its expansionist policy toward Greece and Cyprus to an almost indispensable partner in the production of military equipment, especially ammunition, within a matter of weeks. What is more, an intense debate began on the extent to which Turkey could be a partner within a future European security architecture.

For its part, the Turkish leadership considers its country indispensable for European security and seeks active participation in the procurement of defense equipment and the rearmament of the EU. It can count on the fact that a growing number of EU members, including Poland, Spain, and Italy, maintain good defense relations with Ankara. Ukraine, the country at the center of Europe's new threat perception, also considers Turkey a valuable partner. In addition, the new CDU-led German government views Turkey primarily through the lens of defense policy and wants to expand security relations with Ankara.

It was therefore not surprising that in March 2025, Turkey was classified by both the European Commission and the European Council as a "like-minded" non-EU partner and that it can contribute up to 35 percent to a defense product under the EU's SAFE Regulation, a new mechanism to strengthen joint defense investments. Although Berlin has not yet given its final approval in principle to the possible delivery of Eurofighter jets jointly produced by Germany, France, and Spain to Ankara, the possibility remains open. This is supported by the fact that democratic concerns are generally becoming less important. A few months ago, for example, the German government gave the green light for the delivery of Eurofighter jets to Saudi Arabia.

Three things continue to stand in the way of a deeper security partnership between the EU and Turkey. First is France's skepticism, which sees Turkey primarily as a regional rival, and the opposition of Greece and Cyprus, which see their sovereignty challenged by Turkey. The political situation in Turkey remains a source of uncertainty. The de facto one-man rule of the president not only forces the EU to abandon all its democratic goals, but also leads to an erratic foreign policy style full of surprising U-turns and thus to a low degree of predictability and reliability. Finally, deepening security cooperation is also made more difficult by Ankara's attempts to use it as a shortcut to EU membership and thus to circumvent normative criteria. This complex situation explains why the current proportional limit on Turkey's participation in EU-wide arms projects does not apply to other non-EU members, such as the United Kingdom.

In order to enable the EU to act on this issue, but also to avoid isolating Germany within the EU, the German government should take a gradual approach to integrating Turkey into European defense mechanisms and structures.

In doing so,

- minimise or overcome foreseeable resistance from the European Parliament
- to uphold the indispensability of normative criteria for EU membership

- in order not to completely squander the EU's already greatly diminished political influence over Turkey, but also
 - to prevent EU normative concerns from blocking security cooperation with Turkey
- future economic and security cooperation with Ankara should be strictly separated from Turkey's EU membership process.

In order not to rule out any attempt at security cooperation with Turkey from the outset and to establish a common ground among EU member states in this policy area, all EU members should lift any remaining arms export restrictions on Turkey.

In order to prevent European arms cooperation with Ankara from leading to Turkey increasing its pressure on EU members Greece and the Republic of Cyprus in the eastern Mediterranean, the obligation to provide military assistance within the EU should be strengthened.

To prevent Ankara from exporting arms financed and/or produced in cooperation with EU partners to political or military rivals or opponents of the EU, the usual rules for the export of jointly produced goods, i.e., the consent of all parties involved, should also apply to the resale of goods produced jointly with Turkey.

If these conditions are met, the German government should work to ensure that Turkey can participate in European arms programs to the same extent as other NATO countries that are not members of the EU.

Termination of cooperation with the EU on migration policy and instrumentalization of refugee movements to blackmail the EU and/or its member states

Germany is the primary destination country for irregular migration to Western Europe. It is therefore no coincidence that the agreements to limit the number of refugees, which Brussels concluded with Turkey in 2015, came about on the initiative and under the guidance of Berlin. Since 2011, the EU has provided Turkey with approximately ten trillion euros in support for taking in refugees from Syria, thereby significantly reducing the immigration pressure on Europe. In February 2020, however, the Turkish government not only opened its borders to refugees, but also actively helped migrants to cross the Greek border. The aim was to persuade the EU to provide diplomatic and possibly military support for Turkey's policy in Syria. A year later, in 2021, the Turkish state-owned airline Turkish Airlines transported large numbers of irregular migrants to Belarus, from where they attempted to cross the border into Poland with the help of the Belarusian authorities. In 2022 and 2023, Turkey attempted to destabilize the Republic of Cyprus by allowing large numbers of refugees to travel to the Turkish Republic of Northern Cyprus, from where they illegally crossed the Green Line into the Republic of Cyprus. It is therefore possible at any time that Turkey will once again use refugees as a means of exerting pressure on the EU and/or its member states. This is all the more likely given that the Turkish population is now overwhelmingly opposed to refugees staying in Turkey. Turkey is also the destination of ongoing illegal migration, particularly from Afghanistan and Iran, but is trying to prevent immigration. According to official figures, 225,831 irregular migrants were apprehended in 2024.

The German government has two alternative strategies at its disposal. The first aims *to ensure Turkey's continued cooperation as far as possible*, while the second would seek *to reduce Germany's dependence on Ankara, at least to some extent*.

Turkey's willingness to cooperate can be promoted by ensuring that

- European financial assistance is provided directly to the government, as demanded by the Turkish government, rather than in the form of project financing to the project sponsors, who are often foreign.
- European financial assistance is increased and committed for a longer period of time
- the EU participates (financially and/or organizationally) in Turkey's measures to return refugees to Syria
- the EU declares its willingness to facilitate or promote the import of Turkish products manufactured in special economic zones where a certain percentage of Syrian refugees are employed.

Ways to reduce dependence on Turkey in the refugee issue or to increase the price Turkey pays for breaking agreements would be

- Measures against Turkish Airlines or other Turkish companies that transport irregular refugees
- further reducing the number of visas issued to Turkish citizens
- more effective border controls and a restrictive reinterpretation of the Refugee Convention, with the simultaneous establishment of quotas for the admission of refugees
- terminating or not continuing the refugee agreement.

5.3.2 Germany's policy within and towards NATO

Turkey as sand in NATO's gears

Turkey has long used its membership of NATO to assert its own particular interests. For example, its participation in NATO missions in the Balkans and Afghanistan has also served to maintain a presence in regions that it regards as its own sphere of influence. The more strained the relations between Turkey and its NATO partners are, the more Turkey will make its consent to NATO's political positioning and military actions dependent on being able to achieve its own autonomous goals. Examples of such actions in the past include the (temporary) blocking of the revision of plans to defend Poland and the Baltic states in order to commit NATO to the Turkish definition of terrorist organizations, Ankara's opposition to the election of former NATO Secretary General Rasmussen, and the delay of Finland's and Sweden's admission to NATO at a time when the alliance was facing major challenges. Among other things, Ankara won US approval for the delivery of F-16 fighter jets.

In the 1950s, Turkey sought to join NATO in order to fend off Russian (territorial) claims. However, its presence in NATO was always also a way for Ankara to fend off threats from the West (e.g. in the dispute with Greece) more easily within the alliance than outside it.

Today, Turkey is looking for ways to become more independent from the West and to pursue an autonomous foreign policy and therefore welcomes the development towards a multipolar world. All of this will strengthen the tendency in Turkey to pursue an even more independent course within NATO.

In order to prevent Turkey's willingness to pursue a blockade policy from becoming even stronger, the German government can, on the one hand, increase Turkey's incentives for greater cooperation and, on the other hand, promote joint action by NATO states in the event of a Turkish blockade. Steps in this direction include

- Inclusion of Turkey in PESCO
- Green light for cooperation in the defense industry
- Efforts to achieve a joint reaction by the other NATO states to Turkish unilateral action and the establishment of an implicit conditionality.

Blockade of EU-NATO cooperation over the Republic of Cyprus

The Russian war against Ukraine has once again highlighted the dependence of European defense policy on the USA and the limitations of Europe's strategic capabilities. Although Russia's war has led to a revival of the transatlantic partnership, it is not only Donald Trump's possible re-election that reminds Europeans that they need to expand their own defense efforts. Germany and the Eastern European states insist that this can only be done in close cooperation with the USA and NATO. However, Turkey is blocking increased cooperation between the military branch of the EU and NATO, officially because of the membership of the Republic of Cyprus (RZ), a state that Turkey does not recognize in the EU, but unofficially probably also because Turkey has no interest in the expanded military capabilities of an EU in which it is not a member and therefore has no say.

In order to persuade Turkey to reconsider its blockade stance, the German government could

- on the one hand, examine a gradual and reversible participation of Turkey in PESCO and
- on the other hand, promote the establishment of a European pillar in NATO in order to present Turkey with the alternative of integration or exclusion.

5.3.3 Germany's bilateral policy towards Turkey

5.3.3.1 Economic policy

Cost increase of imports of Turkish semi-finished products by CBAMs as Turkey does not keep pace with the EU Green Deal, endangering supply chains from Turkey

Turkey is a central link in the supply chains of German industry. Abrupt price increases for Turkish semi-finished products or even an interruption in deliveries from Turkey would pose serious problems for the German economy.

The European Green Deal policy provides for the introduction of a Carbon Border Adjustment Mechanism (CBAM). The CBAM is an emissions levy that makes imports from outside the EU more expensive. It is intended to prevent the emergence of locational disadvantages for industry in the EU and serve as an incentive for an energy transition policy in regions with economic ties to the EU.

So far, Turkey's energy and industrial policy has not focused on climate neutrality and the switch to renewable energies. Turkey's energy policy is determined by development policy goals and the pursuit of energy self-sufficiency and the reduction of energy dependencies.

There is therefore a risk that Turkey's energy and industrial policy transformation will not keep pace with the changes within the EU and that Turkish semi-finished products will become more expensive as a result of the introduction of CBAM. This could lead to an impairment of economic relations, which have so far been the lifeline of German-Turkish and European-Turkish cooperation. In this case, existing conflicts could easily escalate.

In order to guarantee the functioning of Turkish supply chains even under the conditions of the European Green Deal, the German government should

- Encourage the development of scenarios on the energy policy development of Turkish industrial and energy policy and its impact on supply chains under the conditions of the Green Deal
- Identify and promote approaches to energy policy cooperation between European member states in the region and Turkey
- Make investment and export guarantees for German companies, especially for the manufacture of energy-intensive products, dependent on steps taken by Turkey to restructure its industrial and energy policy
- Examine the possibilities of relocating supply chains from Turkey to alternative investment locations, particularly in South-East Europe and North Africa.

Lack of legal certainty for German companies in Turkey and systematic discrimination against non-Turkish companies in public tenders

There are 8,000 German-owned or German-participated companies operating in Turkey, mainly in the manufacturing industry, logistics, wholesale and retail. Despite their major contribution to Turkish exports, legal security for foreign companies is inadequate and they are structurally disadvantaged in the awarding of state contracts.

Due to political tensions between Germany and Turkey following the failed coup attempt in 2016, the Turkish government put Germany under pressure by spreading the news through state-affiliated media that a black-list of 681 German companies was circulating in the Turkish bureaucracy, which were accused of "supporting terrorism" and could therefore - like countless Turkish companies in those months - be placed under state trusteeship.

When procuring/placing orders for the production of technically superior products, offers from foreign companies are only considered with a price premium of 15%.

Furthermore, the award procedure for public contracts is highly non-transparent. As early as 2017, only 60% of all public tenders were carried out in transparent procedures. In 2019, Turkey ranked third in terms of the transparency of public tenders among the then seven EU accession candidates (6 Western Balkan states), ahead of Albania and Bosnia-Herzegovina and Serbia with a score of 3.66, far behind frontrunner North Macedonia (score 4.49)

In order to prevent a further decline in legal and planning certainty for German companies as the political system becomes increasingly autocratic and to counteract discriminatory practices, the German government should

- raise the issue in bilateral meetings and in the negotiations on deepening and widening the customs union with the EU
- make Turkey's integration into EU economic support programs dependent on greater transparency and non-discriminatory practices
- point to the better practice in the new EU member states Romania and Bulgaria, which are competing with Turkey for investments.

5.3.3.2 Migration policy

Further increase in asylum seekers from Turkey

Despite the high number of Syrian refugees in Turkey, Lebanon and Iraq seeking a perspective in Europe, in October 2023 it was Turkish citizens who topped the list of asylum seekers in Germany. The current reasons for this were political repression and the ongoing economic crisis, which primarily motivate Kurds, Alevis and secular young individuals and families to migrate. A structural reason for coming to Germany rather than another EU country that should not be neglected is the mechanism of chain migration.

Although the number of Turkish citizens seeking asylum in the EU fell in 2024, as did their share of all applicants, the European Schengen states responded to the high figures in 2023 by drastically restricting the issuance of visas to Turkish citizens. One reason for this was that in 2023, almost 10 percent of Turkish immigrants to the EU applied for asylum, and a large number of Turkish tourists remained in EU countries beyond the legal period of stay.

The Turkish public has reacted angrily to the increasingly restrictive granting of tourist, student and business visas by Germany and suspects that the high number of asylum applications is the reason for this practice. The sluggish issuing of visas has further worsened Berlin's image in Turkey and also has negative consequences for economic relations between the two countries.

In order to counteract a further deterioration in relations and at the same time not jeopardize the influx of skilled workers from Turkey, the German government should

- speed up the recognition and rejection procedure for asylum seekers
- Develop a communication strategy for the German representations in Turkey that publicizes the criteria for recognition as an asylum seeker and the (low) recognition rate
- counteract Germany's image of rejecting 'the Turks' by proactively inviting qualified employees from Turkey.

5.3.3.3 Integration policy

Ankara is increasing polarization within the 'Turkish community' in Germany and positioning its national-conservative mainstream against the German majority society

Since the 1980s, marginalized or oppressed groups in Turkey have used the opportunity to organize and be politically active in Germany. This initially applied to the Islamist Milli Görüş organization and the Kurdish national movement, and later to the heterodox Alevi community. In all these cases, the respective Turkish government accused the Federal Republic of being too lax in its approach or even of promoting actors hostile to Turkey. The same accusation is being made today in relation to the remnants of the Gülen movement.

The fact that the diverse Turkish opposition was able to speak out in Germany was reason enough for Turkey to view the Turkish diaspora (the term had not yet been coined at the time) primarily as a problem for a long time.

However, the AKP government has succeeded in the last decade in promoting the Turkish diaspora, specifically its national-conservative mainstream, and using it as an instrument of its domestic and foreign policy. In their absolute majority, Turkish immigrants to the EU member states represented the rural-conservative part of Turkish society, with an often unbroken relationship to religion and the state ideology, ethnic Turkish nationalism. Today's ruling party has successfully merged these two dimensions of identity on the one hand, and on the other has given the Turkish diaspora the opportunity to participate in elections and referendums in Turkey without much effort.

The diaspora responded not only with a steadily increasing turnout at the polls in Turkey, but also with a high level of support for the ruling party, which achieved even better results in the continental European countries of destination for Turkish migration than in Turkey.

In the last decade, the government there has both promoted Islamization from above - in the form of religious and education policy - and also made room for Islamization from below by promoting non-state religious actors. Through official institutions - such as the state religious authority Diyanet and the newly created Office for Turks Abroad - but also through civil society actors organized in the diaspora - migrant parties, cultural-political associations and mosque communities - the government is pursuing a similar policy towards the diaspora. The means of mobilization are discourses on racism, imperialism and Islamophobia, which are characteristically located exclusively in Western societies, which are portrayed as culturally and morally deficient.

While the conservative mainstream of the diaspora is reflected in the AKP's policy, secular, Alevi, Kurdish and explicitly liberal circles of the Turkish diaspora are opposed to it and polarization in the diaspora is increasing. Signs of this are violent clashes between pro-government and non-government groups, which have so far only occurred sporadically but were previously unknown.

Politics and public opinion in the German majority society view this development with concern. Even before the Turkish government adopted its current active diaspora policy, German expectations regarding a cultural and habitual merging of the Turkish diaspora - its assimilation - had proven to be unrealistic, resulting in complaints about the emergence of a "parallel society". Today, the explicit rejection of assimilation expectations, the insistence on cultural and religious difference and the founding of migrant parties seem to indicate a process at the end of which a not too small part of the Turkish diaspora defines itself negatively, namely through the rejection of the majority society and identifies itself with an increasingly self-confident Turkey in terms of foreign policy and the person of its president.

Measures to prevent further alienation of the Turkish community from the German majority society include the following

- increasing political participation through the mainstreaming of migrants in political parties
- the strict prosecution of hate speech on the migrant and German side
- the avoidance of 'culturalization' and 'essentialization' of social, educational and economic policy problems
- the consistent separation of discourse about/criticism of the Turkish government and 'Turkey' as a country and state, as well as 'the Turks' as a nation and statements about the diaspora
- the promotion of political participation and empowerment of the population of Turkish origin and the granting of social, cultural and political rights regardless of personal, ethnic origin and religious affiliation

[The Turkish religious authority \(Diyanet\) is strengthening its grip on its affiliated mosque communities \(DITIB\) and its influence on the Turkish diaspora](#)

When the 'Turkish-Islamic Union of Diyanet' (DITIB) was founded in 1984 on the initiative of the Turkish state religious authority (Diyanet for short), both the German and Turkish governments regarded it as a measure to contain Turkish-Muslim actors in Germany who were difficult to control (Süleymanlılar) and highly politicized (Milli Görüş). At the time, no offense was taken, but it was welcomed that the president of the Turkish religious authority and one of his deputies are members of the DITIB governing body by virtue of their office, that religious attachés of the Turkish consulates general guide and monitor the activities of Turkish mosque communities and that the religious authority sends imams to Germany who are civil servants and report directly to it.

The authoritarian and partly Islamist policies of the current government, but also the frustration of German expectations regarding the cultural assimilation of the Turkish diaspora, have fundamentally changed this original configuration. When Turkish imams working in DITIB congregations were accused of passing on observations about Turkish political dissidents to the religious authority in Ankara in 2016, the originally cooperative relationship turned into its opposite.

It is true that the Diyanet has now allowed its affiliated mosque communities in Germany to reorganize themselves at the level of the federal states, making it easier for the education ministries of the federal states to accept them as contacts. An agreement concluded between the religious authority and the Federal Ministry of the Interior in 2023, which provides for the gradual termination of the deployment of imams from Turkey and the replacement of imams with Islamic theologians trained in Germany, has also helped to improve the climate. However, developments in Turkey threaten to increase tensions once again. There, the president of the religious authority has made a name for himself as an ideological and organizational campaigner for the ruling party in the parliamentary and presidential elections, and the Diyanet permeates all areas of life with Islamic beliefs and conservative moral teachings on behalf of the government. In Germany, too, the officials sent by the Diyanet are no longer limited to organizing worship in the mosques. They are increasingly active in social and youth work, family support and educational and psychological counseling. The climate in the Diyanet and the policies of the authority in Turkey suggest that this promotes conservative morality and identification with the Turkish state and its government, which is very likely to spread to other (Turkish) mosque communities.

In order to prevent the influence of the Turkish government in the Turkish-Muslim community in Germany from increasing further, the Federal Government should promote the capacity to act and the personal responsibility of the Muslim communities in Germany and, to this end

- break the chain of administrative orders and financial dependence of the DITIB communities on the DITIB headquarters in Cologne and the Diyanet in Ankara
- launch a federal initiative to facilitate the recognition of Muslim communities as public corporations in the federal states, leading to the attainment of equal rights and obligations for Muslim communities with those of Christian churches and Jewish communities
- Insist on self-financing of religious services by the Muslim communities, keyword: mosque tax

- allow for intra-Muslim plurality and refrain from insisting on the identification of a contact person as a representative of (Sunni) Muslims from Turkey in order to be recognized as a body.

Aggravation of the stigmatization of the Turkish diaspora by the majority society as a result of Erdogan's policies and right-wing populist discourses and strategies in Germany

Whenever there has been an election in Turkey in recent years, a debate has started in Germany about why the Turkish ruling party and its leader, President Erdogan, receive more support here than in Turkey and how it can be that 'the Turks' tend to vote social democratic and green - i.e. left-liberal - in elections in Germany and the AKP - i.e. right-wing (authoritarian) - in Turkey. Two 'reasons' are put forward as explanations: firstly, the political influence of Turkey, a foreign state, on the Turkish population in Germany and, secondly, 'a purely instrumental relationship of the Turkish diaspora to democratic norms and principles'. In Germany, the Turkish diaspora enjoys democratic freedoms, but the Turks in Turkey are expected to accept an authoritarian government.

This debate is based on the assumption of a homogeneous Turkish diaspora that is loyal to Erdogan and willing to be mobilized by him against the host country. Right-wing populist discourses about the "non-integrability" of Muslim-Turkish migrants and fears of foreign infiltration are added to this. Surveys show that the third and fourth generations of the population of Turkish origin are far better integrated in terms of education, employment, income and social advancement than their parents were, but that they also feel less accepted and treated less equally.

The following steps are necessary to prevent a vicious circle of rejection and distancing, a self-fulfilling prophecy, and the majority of the Turkish diaspora actually feeling represented by the Turkish and not the German government:

- Careful differentiation between the Turkish government and the diaspora in public and political communication
- a reflective use of language that speaks not of German-Turks but of Germans of Turkish origin, that speaks not only of Germans but also of German citizens when it comes to nationals and that speaks not of foreigners but of new and fellow citizens when it comes to the diaspora.
- a stringent and sustainable anti-discriminatory practice of public institutions
- Strict cultural blindness on the part of state authorities in granting cultural, social, political and civic rights and in economic, social and cultural promotion
- Revision of the curricula for history, politics and ethics lessons

5.3.3.4 Security policy

[Expansion of Turkey's intelligence activities in Germany through MIT agents and the recruitment of undercover agents](#)

Turkey's intelligence activities in Germany have been a topic of public debate since 2016 at the latest, when German state security investigated imams sent by the Turkish religious authority who were accused of collecting personal data from supporters of the Gülen movement in Germany and transmitting it to Ankara. In the years that followed, the German press repeatedly reported on observations and intimidation of Turkish dissidents in Germany by agents of the Turkish national intelligence service MIT. The activities of the Turkish secret service now feature prominently in the annual reports of the offices for the protection of the constitution. If one takes into account the continuing trend towards further autocratization in Turkey, the legislative changes there to transform the Turkish secret service into an operational organization, the expansion of MIT's technical capabilities and reports of covert actions by the service in countries in the Balkans and Central Asia, a further increase in secret service activity in Germany must be expected.

The following steps should be taken to prevent the investigative and operational activities of Turkish services in Germany from becoming the norm, which Turkish dissidents as well as German journalists and politicians must expect:

- Strict prosecution
- Immediate diplomatic response
- Efforts to find a common line with other European countries receiving Turkish migration
- Reduction/limitation of the number of Turkish civil servants (imams, teachers, journalists of the government broadcaster TRT etc.) in Germany
- Increased caution with Turkey's applications via Interpol

[Violent clash between Turks and Kurds in Germany](#)

Since the establishment of the Republic of Turkey in the 1920s, parts of the Kurdish population have rebelled against the ethnic Turkish character of the state and the resulting policies. The Kurdistan Workers' Party (PKK), which carried out its first attacks on Turkish security forces in 1984, became the longest lasting and militarily largest Kurdish challenge to Turkey. The PKK has not only taken the Kurdish problem to Turkey's neighboring countries, Iraq and Syria. Labour migration from Turkey to Europe has also enabled the organization to put the Kurdish issue on the agenda in Europe.

The PKK has been banned in Germany since 1994. At the time, this was due to the blockade of highways and the occupation of Turkish diplomatic missions. In 2004, the Federal Court of Justice ruled that the leadership of the PKK in Germany should be regarded as a "criminal organization". The leader of the PKK, Abdullah Öcalan, had already issued orders in 1996 to refrain from using violence in Germany in future. In April 2015, Cemil Bayık, a member of the PKK's three-person executive council, apologized to the "German people" for the actions in the 1990s. Nevertheless, the assessment once made does not only persist in Germany. Today, the PKK is regarded by the offices for the protection of the constitution as the banned organization with the

greatest potential for political mobilization in Germany. Members of the leadership are regularly charged and convicted.

Following protests on the occasion of Abdullah Öcalan's arrest in 1999, demonstrations by PKK supporters and sympathizers of the Kurdish national movement have been taking place in Germany since 2016, mainly due to Turkey's campaigns against Kurdish-held areas in northern Syria. Since then, Turkey has been determined to destroy the Kurdish self-government established by PKK-affiliated groups in northern Syria. Following the military defeat of the PKK in Turkey, Ankara is now preparing the final blow against the centers of the PKK guerrillas in northern Iraq.

In recent years and months, there have already been isolated clashes between PKK-affiliated circles and far-right Turkish organizations in European countries receiving migrants from Turkey. Should Öcalan lose his life in Turkish solitary confinement, the Turkish army attack the PKK centers in northern Iraq with ground troops or destroy the Kurdish self-administration in Syria, clashes may occur on a scale not seen in recent years.

In order to prevent such an escalation, the federal and state governments should

- Establish unofficial channels of communication with Kurdish associations
- make the far-right Turkish scene feel that it is being closely monitored
- Ensure consistent prosecution of hate speech on both sides
- Develop scenarios and preparations for immediate intervention
- with European partners, the Kurdish question and the need for a political solution, which is rarely discussed in official negotiations with Turkey.

[The Turkish diaspora is becoming part of the domestic political debate in Germany over policy towards Israel and Palestine](#)

Unlike other EU states, the German government has clearly positioned itself on the side of the Israeli government in the Middle East conflict.

In Turkey, the government took a radical stance against Israel right at the beginning of the Israeli bombardment of the Gaza Strip, but was only forced to impose trade sanctions against Israel as a result of street protests and the respectable success of the Islamist New Welfare Party (YRP) in the local elections.

In October 2023, a good third of the German population rejected Israel's actions in Gaza, and in March 2024, more than two thirds of the population said that the high number of victims in the Gaza Strip was not justified.

Demonstrations against Israel's actions in Germany were initially dominated by Palestinian organizations and Arab-Muslim participants. In the meantime, the debate about the right position in the Gaza war has spread to universities and there have been harsh police actions against students.

How will the strictly pro-Israeli stance of German politics, its focus on "growing anti-Semitism" while at the same time very reluctantly standing up for the right to life of the Palestinians, affect the mood among the approximately 5.4 million Muslims in Germany and future coexistence in Germany?

Although Turkish organizations have so far refrained from making public statements or even calling for demonstrations, the German government's stance has been met with widespread incomprehension and outrage. Statements from Turkish associations, mosque communities and politicians point this out. There is a

growing conviction that the German government is applying double standards in its commitment to universal values to the detriment of Muslims. This opened the door to the Turkish government's propaganda and its discourse about Islamophobia in the West and an irreconcilable opposition between Muslims on the one hand and secular people or Christians on the other.

To counteract this, the federal government should:

- keep the channels open for non-violent protest against Israel and their own stance, so as not to offer potential violent actors any legitimization for violent action
- do not call into question the fundamental rights to freedom of opinion and political activity of Germans with (and without) a migration background by referring to Germany's historical guilt
- avoid the impression that double standards are being applied in the defense of human rights and international norms.

6. About the Authors

Sinem Adar is an Associate at the German Institute for International and Security Affairs (SWP). Her work focuses on Turkish foreign and security policy, and domestic politics. Since 2024, she has been leading, with Muriel Asseburg, the working group entitled “Autocratization as a Challenge for German and European Foreign Policy” at the SWP. Adar holds a PhD from Brown University in the US and a Master's degree from the London School of Economics.

Hürcan Aslı Aksoy is Head of the *Centre for Applied Turkey Studies (CATS)* at the German Institute for International and Security Affairs (SWP) in Berlin. Her research focuses on democratisation and autocratisation processes in Turkey, the dynamics of state–civil society relations, gender and politics in Turkey, as well as Turkey’s foreign and security policy in the Middle East and Africa. She recently published a study with the Friedrich-Ebert-Stiftung on the discursive dynamics of Turkey’s security policy and its multifaceted, often ambivalent role within NATO. Before joining CATS, she was a postdoctoral research associate at the Chair of Middle Eastern Politics and Society at the University of Erlangen–Nürnberg. She has held research fellowships in Vienna, Tübingen, and Amman. She holds a PhD and MA in Political Science from the University of Tübingen and a BA from Boğaziçi University in Istanbul.

Günter Seufert is a freelance author and publicist based in Berlin. He worked as a journalist, academic researcher and research coordinator in Istanbul, as a research fellow at the University of Lausanne, as visiting associate professor at the University of Cyprus in Nicosia and from 2010 onwards as policy analyst with the German Institute for International Affairs and Security (SWP) in Berlin. From 2019 to 2023 he was the founding director of the Center for Applied Turkey Studies (CATS). Beyond his ongoing cooperation with CATS, he publishes with the German edition of *Le Monde diplomatique*, *Internationale Politik*, the journal of the German Council for Foreign Relations and the German Institute for Global and Area Studies (GIGA) in Hamburg.

Gustav Gustenau, a brigadier general (ret.), Mag., has been working as Secretary General of the European Institute for Counter Terrorism and Conflict Prevention (EICTP) in Vienna since 2019. His research has focused on strategic future analysis, risk assessment and security development in various areas of security policy. He worked for the Austrian Ministry for Defence between 2000 and 2021, et al. as a liaison officer and security policy adviser. He also obtained a position as a researcher at the Institute for Strategic Research at the National Defence Academy, focusing also on the area of Former Yugoslavia between 1989–1997. Between 1997 and 2001 he served as Director at the Institute for International Peace Support at National Defence academy in Vienna. Gustenau studied modern history, political science and philosophy at the University of Vienna.