

ANALYSIS

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November 2025

Türkiye's Strategic Influence in Southeast Europe

A View from Three Capitals

Friedrich
Ebert 
Stiftung

Imprint

Publisher

Friedrich-Ebert-Stiftung Dialogue Southeast Europe
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November 2025
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Foreword

Türkiye's role in Southeast Europe (SEE) is often framed in the context of its EU accession process. Although this narrative dominated regional debates in the early 2000s, it no longer adequately reflects Türkiye's evolving engagement with its immediate neighbourhood. In an increasingly fragmented international system and amid recalibrated transatlantic relations, Ankara has adopted a more autonomous and assertive regional policy, particularly in the Western Balkans and the wider Black Sea area.

This publication brings together three national perspectives – from Bulgaria, Romania, and Serbia – on Türkiye's growing presence and strategic relevance in Southeast Europe. Each contribution, written by a regional expert, provides an analysis specific to the author's country, examining how Türkiye's ambitions are perceived and negotiated within the context of domestic politics, economics, and security.

Türkiye is not a new player in Southeast Europe. It has longstanding historical, cultural, and economic links to the region. However, its current approach reflects a qualitative shift. Rather than positioning itself merely as a partner or stakeholder, Ankara is increasingly presenting itself as a power capable of shaping outcomes. Through bilateral diplomacy, economic statecraft and targeted security cooperation, the country's role is expanding in both scope and ambition.

Sarah Hees-Kalyani
Regional Coordinator
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This development coincides with broader strategic uncertainty in Europe. The erosion of normative consensus in transatlantic relations, the war in Ukraine, and shifting alliances in the Global South have created new dynamics in which medium-sized powers can play more agile and multidirectional roles. Given its geographic position – anchored in NATO, active in the Black Sea, and with significant influence in the Western Balkans – Türkiye is particularly relevant to the future of European security.

Against this backdrop, the three country analyses presented here serve several purposes: they evaluate how Ankara's policies are perceived and responded to within the region; they highlight areas of convergences and divergences; and they contribute to a more nuanced debate about the future of the regional order in Southeast Europe.

Rather than presenting a single narrative, this volume reflects the diversity of national interests and perceptions within SEE. It highlights the importance for European and regional stakeholders engaging more strategically with Türkiye – not just reactively, but with a clearer understanding of Ankara's long-term objectives and presence in the region.

We are grateful to the authors for their contributions and hope that this volume will encourage more in-depth dialogue among policymakers, analysts, and practitioners working at the intersection of Southeast European and Turkish foreign policy.

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Türkiye in Southeast Europe – A View from Bulgaria

Marian Karagyozov

Introduction

The region of Southeast Europe (SEE) has a complex strategic architecture. This is because a number of vectors of influence traditionally intersect here: European, Russian, Atlantic, Islamic (mainly Türkiye, but recently also other players, such as the United Arab Emirates). Secondly, while most countries in Southeast Europe are members of NATO, fewer are members of the European Union. Bosnia and Herzegovina, Kosovo and Serbia are not NATO members, either, and none of the countries of the so-called Western Balkans are EU members. Furthermore, EU membership seems scarcely realistic in the medium term for any of these countries. EU enlargement came to a halt in the region with Croatia's accession in 2013.

Currently, despite instrumentalising EU integration in the past to gain legitimacy both at home and abroad, Western Balkan leaders do not seem to have the political will to push for EU accession, as it would threaten the personalised power structures they have built up over time. The weakening of any prospect of EU membership has given many of these leaders more incentive to cultivate closer ties with other countries, including Russia, China, Türkiye and the UAE. In response, the EU's interest in the region tends to spike whenever its relative disengagement coincides with the growing influence of other geopolitical actors. The EU's most recent engagement with the region was driven almost entirely by geopolitical considerations in the context of the war in Ukraine and its own standoff with Moscow. Regrettably, it lacks any meaningful focus on democratisation within the countries of the region.

In this context, Türkiye is seeking to expand its role in the region. Ankara is pursuing a comprehensive strategy that combines elements of both soft and hard power, enabling it to offset relative weaknesses in certain areas.

Türkiye as a key player in Balkan politics

Türkiye has free trade agreements (FTA) with all Balkan countries. From the standpoint of economic engagement with Ankara, the peninsula could be divided in two

subregions: the five EU Member States¹ and the Western Balkans.² Three of the EU Members (Bulgaria, Greece and Romania) enjoy the lion's share of trade with Türkiye in absolute volume (67 per cent of Turkish exports). From 2010 to 2020, Türkiye ranked among the top ten exporters of goods to Southeast European (SEE) countries, not including Greece and Croatia. Türkiye was the second-biggest exporter of goods to Kosovo, fourth to Albania, fifth to Bulgaria and sixth to Slovenia. In the opposite direction, SEE countries do not rank among the top ten exporters of goods to Türkiye. Ankara runs a positive trade balance with the Balkan region. Türkiye is a significant export destination for Bulgaria; 8 per cent of total Bulgarian goods exports went to Türkiye. Bulgaria remains very reliant on Türkiye's economic growth trends (Türbedar 2022). Since 2000, Türkiye's investments in Romania have exceeded 7 billion US dollars and approach 2 billion US dollars in Bulgaria (Ekinci 2019).

In the Western Balkans, Serbia is the main Turkish trade partner and attracts the biggest share of Turkish foreign direct investments (FDI). In 2010–2020, Turkish FDI in the Republic of North Macedonia amounted to 353 million euros (€) (11.5 per cent of the total), ranking second. Ankara is among the five countries with the largest investments in Albania and Kosovo. If services contracts are included, Turkish investments in Albania reach 3.5 billion US dollars. They are calculated strategically and include ownership of the country's second largest bank, hydropower plants, an iron melting plant, as well as telecom operator ALBtelecom.³ This gives Türkiye access to sensitive infrastructure. In Kosovo, Turkish banks have an 18 per cent share in the sector and a Turkish company is the owner of the electricity grid operator. Türkiye is Bosnia and Herzegovina's eighth largest trading partner (4.1 per cent of total trade volume). In fact, this falls far short of the two sides' expectations. Türkiye invested around 250 million US dollars in Bosnia and Herzegovina from 1994 to 2019, which puts it in eleventh place in terms of FDI. Since Montenegro's NATO accession in 2017, the number of Turkish companies in the country has increased tenfold (Đurković 2022). An exact estimation of Turkish investments is difficult because UNCTAD and official

¹ Bulgaria, Croatia, Greece, Romania, Slovenia.

² Albania, Bosnia and Herzegovina, Kosovo, Montenegro, Republic of North Macedonia (RNM), Serbia.

³ Formerly known as Eagle Mobile.

Turkish statistics differ somewhat. On top of that, some major Turkish investments formally derive from companies registered elsewhere, such as the Netherlands (Türbedar 2022).

In the financial sector Türkiye's aspirations are to have at least one bank with Turkish capital in each Balkan state. Turkish banks are seen by prospective Turkish investors as facilitators when it comes to dealing with regulations in the target countries. They also help to overcome the language barrier (Hake 2020). In this way, Ankara not only benefits from local economies, but also creates levers of influence. This enables Türkiye to intervene in local economic and political processes. Control over credit is key, as it allows certain individuals, companies or institutions to obtain finance. The presence of Turkish state-owned banks allows preferential zero- or low-interest loans to be granted to areas or people with strong political ties to Türkiye. This can create dependencies and build networks of economically connected businessmen and politicians whose activities are closely linked to Ankara funding. They become important conduits of Turkish interests at the local level. An illustrative example comes from Bosnia and Herzegovina, where bad loans were issued to people close both to the Turkish Justice and Development Party (*Adalet ve Kalkınma Partisi*, AKP) and the Bosnian Party of Democratic Action (SDA), which triggered debates even in the Turkish parliament (Huskić and Büyük 2022). In contrast to IMF, World Bank and European funding, Turkish investments come without political conditions, and often to underdeveloped regions, populated by Muslim or Turkish minorities.

In sum, there is a clear imbalance in favour of Türkiye among the Balkan states in economic, financial and investment terms. In contrast with Greece and Bulgaria, the Western Balkans and even Romania are running a trade deficit in their bilateral trade with Ankara. Although it is still relatively limited, in the past two decades Turkish economic influence in the region has expanded, while the Balkan countries have practically no economic influence in Türkiye.

Türkiye's regional influence is reinforced by its role as an energy transit hub. The »Turkish Stream« pipeline delivers Russian gas to Türkiye, with an extension running through Bulgaria and Serbia toward Hungary, with a capacity of 16 billion cubic meters/year (bcm/y). Serbia laid its section of the pipeline in coordination with its neighbours, completing it in 2021 and beginning to receive gas the same year. At the same time, the Southern Gas Corridor, including the Trans-Anatolian Pipeline (TANAP) and its continuation, the Trans Adriatic Pipeline, brings Azeri gas to Europe, with part of the flow directed to Bulgaria and other Balkan states. The capacity of the pipeline is 10 bcm/y, of which 8 bcm/y are destined for Italy and the remaining 2 for the Balkans. However, although these projects help with the diversification of suppliers, because all Azeri gas exports pass through Türkiye Ankara has a strategic position as a

vital corridor for both Russian and Azerbaijani energy, strengthening its leverage across the region.

Turkish economic penetration is complemented by consistent development assistance and humanitarian aid to the region. The Balkans are one of the focal points of the Turkish Cooperation and Coordination Agency (TİKA). According to TİKA data on aid distribution, the Balkans and Eastern Europe rank second in terms of the number of projects related to the preservation of Ottoman heritage, both material and non-material. Between 2014 and 2021, the largest amount of TİKA assistance in the Balkans and Eastern Europe went to Bosnia (214.5 million US dollars), Albania (193.3 million US dollars), and North Macedonia (98.5 million US dollars). From the 1990s to 2022, the agency implemented more than 5,500 projects in the region: 1,750 in the social and communications sector; 1,350 in the education sector; and 1,050 projects for the development of administrative and civil infrastructure (Grishin and Islamov 2023). From the mid-2000s onwards, the amount of financial assistance to the Balkans provided via TİKA has exceeded 1 billion US dollars. TİKA's track record in the Balkans is indicative of its evolution over the years: it started as an agency for technical assistance, but in recent years it has become capable of implementing projects in various fields.

Ankara has visa-free travel agreements with all non-EU Balkan countries and, in some cases, even travel with a domestic ID is possible (North Macedonia, Serbia). Because of the EU's common border policy, Turkish citizens travelling to Bulgaria and Romania need visas, but not the other way around: Bulgarians and Romanians can visit Türkiye with their ID cards. A visa is needed for Turks wanting to visit Greece, but with some exceptions for short stays on the Greek islands during the summer period.

The transport connections between Türkiye and the SEE countries are another element of soft power. Turkish Airlines offers the most frequent flights to Balkan cities: Belgrade (21 per week/3 per day), Podgorica (18 per week), Skopje (14 per week/2 per day), Sarajevo (14 per week), Pristina (11 per week), and Tivat (5 per week). Pegasus Airlines, a private Turkish low-cost company, also operates weekly flights to all Western Balkan capitals: 11 flights to Tirana and Sarajevo, 8 to Pristina and Skopje, 7 to Podgorica and 4 to Belgrade. For comparison, among European carriers, only Austrian Airlines operates direct flights to all Western Balkan capitals (Zoric 2024). Turkish Airlines has direct flights also between Istanbul and Bucharest, Cluj-Napoca and Constanta with a total of 32 flights per week to Romania. This makes Türkiye a popular destination to visitors from the region: the annual number of visitors from SEE has more than doubled since the early 2000s, reaching 4.6 million in 2018 (Ekinci 2019).

The Turkish Directorate of Religious Affairs (*Diyanet İşleri Başkanlığı*), the Yunus Emre Institute, promoting Turkish language and culture, and the Office for Turks Abroad and

Related Communities (YTB), providing scholarships, training and other support, are active in the region, as are educational institutions (schools, dormitories, universities) and state-owned media, such as the Anadolu Agency and Turkish Radio and Television (TRT).

In addition to offering theological education to students from the region, and providing Islamic literature in Turkish and in local languages, the *Diyanet* provides financial support to numerous official Islamic institutions in the Balkans. There are also coordination offices for Religious Services in Turkish embassies and religious attaché offices in Turkish General Consulates. Turkish state structures and non-state Islamic groups exercise the strongest external influence over Balkan Muslims. This is because of the mutual complementarity between the Turkish state and non-state players, such as foundations, NGOs and religious orders (*cemaat*). Their significant financial, human and other resources play a role here, as well as the broader international context. One might mention the successive blows dealt to Arab Wahhabi influence after 11 September 2001 and the rise of ISIS in 2013–2015. But most importantly, the common linguistic and/or cultural closeness with Balkan Muslims has made it possible for Turkish groups to present their traditions and Islamic practice as identical to the local variety. For the *Diyanet* their relations with Balkan Muslim hierarchies in forums such as the Eurasian Islamic Council (*Avrasya İslam Şurası*) and meetings of Balkan Muslim religious leaders are important with regard to Turkish ambitions to be a global leader of Sunni Muslims.

The *Diyanet* has also financed the building of the biggest mosques in the capitals of Albania, Kosovo and North Macedonia as a symbolic and even physical expression of Turkish prestige and influence. Because of the instability in the Middle East, Türkiye has remained the only significant foreign destination for theology students from the Balkans and it benefits from its growing alumni network. Türkiye's influence over the Muslim population in the Balkans is not only an expression of cultural connections and social prestige, but also may be used to exert pressure on local leaders. In previous years the *Diyanet* has used this influence for the purpose of outright intervention in issues involving local Muslim institutions, such as electing Grand Mufties in Albania, Bulgaria, Serbia and Montenegro. Bosnia and Herzegovina, Serbia and Bulgaria are among the most striking examples in this context, in which Turkish soft power is not always particularly »soft« (Alpan and Öztürk 2022). Turkish scholar Ahmet Erdi Öztürk observed that during the era of the Justice and Development Party (AKP) in Türkiye, the *Diyanet* became a high-profile institution, with a much more conservative worldview, which became synchronised with the ruling party's rhetoric and actions in spheres such as gender, social media and even on political questions, such as strikes, responses to the attempted coup and so on. *Diyanet*'s activities take place at the intersection of Türkiye's Neo-Ottoman ambitions, its newly-emerged kin and diaspora policy, and

its commitment to belief-based transnational solidarity (Öztürk 2016; Öztürk and Gözaydın 2018).

Overall, Türkiye is cultivating an image as a protector of the Balkan Muslims as part of its attempts to present itself as a defender of Muslims worldwide. This is in line with the Turkish political elite's regular denunciations of Islamophobia and the double standards of Western Europe.

The Yunus Emre Institute, fashioned after European cultural institutes such as the Goethe Institute and the British Council, has many branches (33 per cent of the total) in the Balkans. Indeed, Bosnia and Kosovo are the only countries with three centres each, which speaks volumes about the importance of the Balkans in the Institute's overall work. Branches are active in all Balkan countries, with the exception of Bulgaria, Greece and Slovenia. The applications received from Balkan countries to the Turkish government scholarship programme *Türkiye Bursları* make up only 1.5 per cent of the total, but around 15 per cent – the fourth largest group – of total beneficiaries (Tabak and Bozkurt 2022).

In recent years, military cooperation between Türkiye and the region has been increasing as well. The Turkish army (ninth in the world in terms of military strength) is the strongest in the region (the next one in the region is Greece, ranking thirtieth). This makes Türkiye a military powerhouse in Southeast Europe. Türkiye's export list to the region includes armoured vehicles, rifles and machine guns, drones, mortars, howitzers, hardware and software technologies, and ship systems. Since 2019, Türkiye has signed various military agreements with Serbia, Romania, Kosovo, Albania, Montenegro, Bosnia and Herzegovina, and North Macedonia. And Türkiye is about to become the largest military donor to individual countries in the Western Balkans. In 2022, Türkiye was the largest military donor to Albania, and the next year to Montenegro (Vuksanović 2024). Countries receiving military equipment under these agreements procure defence products from Turkish companies. Therefore, while Türkiye's grants assist in meeting the military requirements of Balkan nations to NATO standards, they also increase their dependence on the Turkish defence industry (Emin and Ekinci 2024). Additionally, the Turkish Military Academy is educating military cadets from Albania, Bosnia and Herzegovina, Kosovo, Montenegro and North Macedonia, which attunes them to the language, military doctrines and values of the host country (Vuksanović 2024).

Türkiye's foreign policy doctrine: in pursuit of strategic autonomy

Turkish expert Aslı Aydıntaşbaş claims that Türkiye's activism in the Western Balkans does not represent an alternative to Europeanisation in the region (Aydıntaşbaş 2019). Although Türkiye pays lip service to Euro-Atlantic integration, its actions do not favour the process. Other

scholars believe that the Turkish approach should be analysed independently of the Europeanisation framework (Alpan and Öztürk 2022). Oya Dursun-Özkanca goes further, arguing that in the context of the sharp and sustained de-Europeanisation of Turkish foreign policy, Türkiye and the EU have for some time been conducting »soft balancing« against each other in the Balkans (Dursun-Özkanca 2016).

A thorough answer to the question of the extent to which Türkiye's expanding engagements in Southeast Europe intersect with or challenge the strategic interests of other major actors, such as the EU, NATO and Russia, requires an examination of Turkish foreign policy under the so-called »New Türkiye« (*Yeni Türkiye*).⁴ The outbreak of civil war in Syria led to divergence between the interests of Türkiye and its Western allies, who support Kurdish forces against the Islamic State. For its part, Ankara is concerned about the de facto autonomous zone created in northern Syria and considers the Kurdish organisations active there to be branches of the Kurdistan Workers Party (PKK). After the coup attempt, Türkiye criticised its Western allies for not condemning the putsch strongly enough, while they in turn accused Ankara of human rights violations. This further widened the gap between the two sides, and Türkiye began to actively pursue »strategic autonomy« (Kutlay and Öniş 2021; Shlykov 2024). Its main pillars are as follows: reducing dependence on Western foreign policy by expanding ties with Russia, China and countries of the Global South; pursuing an active diplomacy and the formation of alliances with various countries on specific issues; maintaining an active presence on the ground in a number of hot spots, such as Iraq, Karabakh, Libya, Syria, and Somalia; and developing the Turkish defence industry. Türkiye persistently pursues these strategic goals, often combining them with a paradoxical pragmatism and seeking various ways to achieve them.

In October 2022, on the eve of the centennial of the foundation of the Republic, President Recep Tayyip Erdoğan proclaimed the twenty-first century as »the Century of Türkiye«. The Turkish Ministry of Foreign Affairs states that, under this vision, the country pursues an »independent and national foreign policy«, one of its goals being »to influence the transformation of the global system« (MFA n.d.). The Turkish President has repeatedly declared that the existing system of international relations is not fair and that reform of the UN Security Council is necessary. In 2013, he stated for the first time before the

UN General Assembly (UNGA): »The world is bigger than five!«, referring to the five permanent members of the Security Council. Since then, Erdoğan has ended every speech at the UNGA with this statement. These ideas, expressed in articles in prestigious media outlets in various countries, are summarised in his book *A Fairer World is Possible*, published in seven languages (Arabic, German, English, French, Russian, Turkish, Spanish) in 2021. Furthermore, the Turkish Ministry of Foreign Affairs puts special emphasis on Türkiye being »strong on the ground and at the table« (MFA n.d.). Earlier, Ibrahim Kalın, then presidential spokesman and, since 2023, director of the Turkish National Intelligence Organisation (MIT), described Ankara's approach as a »360-degree foreign policy« (Kalın 2018).

Meanwhile, there has been a significant »de-Europeanisation« of Turkish foreign policy, understood as a decrease in the degree of alignment with EU foreign policy, as expressed in sanctions, restrictive measures and declarations. The highest degree of alignment with the EU was between 2006 and 2010. In 2007, a record was set when Ankara acted in accordance with 45 of the EU's 46 positions (98 per cent compliance) and a compliance rate of 70–80 per cent was maintained until 2010. In 2012 and 2013, it fell to 53 and 46 per cent, respectively (Noi 2025). After this date, a major divergence emerged under the influence of two factors: developments in the Middle East after 2011, in which Türkiye sought an independent role and which led to a militarisation of Turkish foreign policy,⁵ and the Russian occupation of Crimea in 2014, which led to numerous EU sanctions against Moscow.

Although the militarisation of Turkish foreign policy does not cover all regions – for example, the Balkans (Karagyozyov 2024), it is one of the factors that has resulted in the opening up of a divide between EU and Turkish foreign policy instruments. Concerning the annexation of Crimea, for example, Ankara preferred to maintain its relations with Russia and thus did not impose sanctions against it, probably because of its huge trade deficit and energy dependence. This led to a collapse in Türkiye's alignment with European policy: standing at 29 per cent in 2014, the proportion of issues on which it was aligned with Europe continued to fall in subsequent years (with the exception of 2019). This clearly demonstrates Türkiye's desire for strategic autonomy. The alignment of Turkish and European foreign policy reached a record low in 2022 at just 7 per cent and in 2024 at only 5 per cent. This

⁴ »New Türkiye« is a vision for the economic, political, diplomatic, industrial, and social development of the country, launched by R. T. Erdogan on the eve of the 2014 presidential elections.

⁵ There is a divergence of opinions on the causes and scope of the militarisation of Turkish foreign policy. According to one view, this phenomenon is due to threats to Turkish national security arising next to the Turkish border from non-state actors such as Syrian Kurdish militias and the Islamic State. Other authors believe that militarisation reflects Türkiye's ambitions. For the most comprehensive and in-depth study of the militarisation of the TFP see Kardaş, Sinkaya and Pehlivan Türk 2025.

probably also reflects the European Council's decision in 2019 to freeze some aspects of Türkiye's European integration as a sanction against Ankara's aggressive actions in the Eastern Mediterranean (Noi 2025). In recent years, the Turkish Ministry of Foreign Affairs has responded with extremely harsh statements in response to EU reports on the country's progress. No new negotiation chapters have been opened since 2016. The lack of a credible prospect for Türkiye's accession to the EU has further fuelled the de-Europeanisation trend in Turkish foreign policy.

In this context – de-Europeanisation and Türkiye's pursuit of strategic autonomy through multidimensional and multi-vector foreign policy – the EU's conditionalities no longer work. Therefore, decisions such as the European Parliament's indefinite suspension of Türkiye's EU accession on 8 May 2025 for »democratic backsliding« do not represent a serious blow for President Erdoğan. He gets what he needs from Europe through bilateral agreements with individual Member States. Thus Ankara does not need to »compete« with the EU in the Balkans. It currently has sufficient room for manoeuvre, and EU and NATO involvement stabilises the region, relieving Ankara of unwanted financial commitments, which could overstretch its budget. The FDI and the money coming from pre-accession funds have stabilised the region economically, allowing Ankara to concentrate its spending on soft power and in other desired spheres.

Keeping Türkiye embedded in the European defence infrastructure, however, remains paramount for the EU and NATO. The war in Ukraine has led to a complete reassessment of priorities on the Old Continent. At the end of March 2025, the European Commission published a »White Paper for European Defence – Readiness 2030«, which presents a plan for the rearmament of Europe. This brought the question of Türkiye's possible participation in European defence projects to the forefront of debates among experts and policymakers. Among Ankara's main advantages are its large army and rapidly developing military industry.

Currently, the EU's defence architecture and policies consist of multiple mechanisms, and the picture is mixed with regard to Türkiye. Ankara participates in some, but not in most. For example, Türkiye is not part of the Coordinated Annual Review on Defence (CARD), the European Defence Agency (EDA), responsible for military research, the European Defence Fund (EDF), the European Peace Facility (EPF), Permanent Structured Cooperation (PESCO) nor ReArm EU. Türkiye is part of 21 EU military and civilian missions around the world, along with other non-EU countries, and has limited participation in the European

Defence Industry Reinforcement through Common Procurement Act (EDIRPA) (Taştan, Dalay, Quencez and Wright n.d.). Apart from the last two examples, any more serious participation by Türkiye in European defence mechanisms would require either their complete restructuring (opening up those intended only for Member States to third countries), or the negotiation, signing and ratification of special rules or agreements on Ankara's participation in those mechanisms in which third-party participation is possible (CARD, EDA, EDF, EPF, PESCO).

In January 2021 Türkiye applied to participate in the Military Mobility project, which is a major PESCO initiative. The application was rejected on the grounds that Türkiye neither shares the fundamental values of the European Union nor aligns itself with the EU's foreign policy statements and actions. It was also noted that some of Türkiye's foreign policy actions are directly opposed to the security interests of EU Member States Greece and Cyprus. German defence experts regard PESCO as more interesting for smaller EU Member States than for Türkiye, because it foresees only limited financial support and transfer of technical know-how and thus fails to satisfy broader Turkish expectations (Seufert 2025).

The main problem facing Türkiye's integration into the European defence architecture stems from the strategically different goals of the EU and Ankara. The first significant difference is Ankara's policy of strategic autonomy, which includes maintaining ties with Moscow. Its desire to develop a »native and local«⁶ military industry as part of this policy also contradicts the goal of European policy aimed at containing Russia. Secondly, Türkiye does not view the threat from Russia in the same way as (most) EU countries. According to recent FES research on public perceptions, the majority of Turks are less likely to agree that ending the war in Ukraine is a necessary requirement for peace in Europe. Although most respondents point to Russia as responsible for starting the conflict (50 per cent), a nearly equal share blame the US (46 per cent), while somewhat fewer people (26 per cent) apportion some responsibility to the EU. The majority of Turks are in favour of their country remaining neutral in the conflict (38 per cent) or supporting diplomatic efforts to end it (47 per cent) (*Security Radar 2025*, see Katsioulis, Dienes, Josten, Kaschowitz, Unkel and Weiß 2025). Türkiye does not see a direct and immediate threat from Moscow (Çoskun 2025). Furthermore, generally speaking, relations between the EU and Türkiye are fraught with chronic mistrust and alienation.

Concerns about strengthening defence cooperation with Türkiye are also raised by a marked democratic decline in all key areas, including the rule of law, media freedom,

6 »Yerli ve milli« in Turkish, another slogan used by the Turkish leadership.

freedom of speech and political repression. It is also questionable what concrete incentives for cooperation the EU can offer Türkiye. Ankara would like to use security cooperation as a driver for renewing relations with the EU and achieving important goals such as modernising the Customs Union or full visa liberalisation, as was the case with the March 2016 refugee agreement. This is scarcely imaginable at present. As already mentioned, Türkiye's EU accession is effectively blocked and there are no prospects for its restart in the foreseeable future.

Furthermore, analyses recommending various solutions to draw Türkiye into much tighter European defence cooperation against Russia offer virtually no recipe for overcoming the asymmetrical dependence between Ankara and Moscow in areas such as natural gas imports and nuclear energy (for example, Türkiye's first nuclear power plant is being built entirely by the Russian state company Rosatom). Last but not least, even assuming hypothetically that the above mentioned obstacles were removed, Türkiye would most likely not agree to replace NATO with an EU-centred security architecture. Türkiye is a member of NATO but not of the EU, so it has more influence within the Alliance than it would have in an EU-led structure, in which Ankara fears hostility from countries such as Austria, Cyprus, France and Greece (Çoskun 2025; Kibaroglu 2025), despite some positive signals from these countries since the beginning of 2025. For example, to produce systems compatible with NATO standards, the EU requires access to the NATO technical documentation, but NATO's rules require consensus of the member states on sharing classified information with third parties. Türkiye has consistently withheld consent, citing its exclusion from EU structures.

To sum up, the desire to involve Türkiye in projects to strengthen European defence is likely to encounter a number of institutional, political, financial and technological obstacles. It is probable that Türkiye will develop cooperation with individual Member States, such as Spain, Italy, Poland and Romania. For its part, Bulgaria has not articulated a clear public position on potential EU–Türkiye cooperation. Tellingly, it has so far refrained from purchasing key military equipment, such as armoured vehicles or drones, from Türkiye.

Bulgaria's positioning in the context of Türkiye's rising importance

The implications of Türkiye's growing influence for Bulgaria's national security and foreign policy priorities need to be assessed carefully. Economically, Türkiye is a key trading partner of Bulgaria. The relationship is marked by mutual interdependence, as Bulgaria serves as the most direct transit route for Turkish exports to Western Europe. Each year, more than 1,250,000 Turkish lorries (TIRs) pass through Bulgarian territory.

In terms of Ankara's »soft power«, there is no Yunus Emre Institute or TİKA office in Bulgaria. Nevertheless, Türkiye has been able to carry out projects to renovate religious monuments and build new mosques either through bilateral agreements on the protection of cultural heritage or through the Grand Muftiate, the structure governing the religious affairs of Bulgarian Muslims, which receives direct funding from Ankara. The *Diyanet* is also active in Bulgaria through its attachés, sending visiting imams from Türkiye, material aid and food packages during religious holidays, and providing scholarships for the theological education of Bulgarian young people in Türkiye (Telci and Peneva 2019).

Turkish state media, such as TRT and AA, do not make much effort to reach the Bulgarian audience, but this is compensated by geographical proximity and the ability of Bulgarian citizens of Turkish origin to directly access Turkish language news and programmes from Turkish media operating inside Türkiye.

Politically, bilateral relations are generally regarded as rather good. Bulgaria and Türkiye have direct contacts at state level and do not need intermediaries. Given the large number of Bulgarian citizens with a Turkish ethnic background and/or Muslim faith, however, this variable could be factored into bilateral relations, too. The Movement for Rights and Freedoms (MRF), whose core electoral base consists of Muslim citizens of Turkish origin, has played an important role in Bulgarian politics for decades. The party's historical trajectory demonstrates that it should not be viewed merely as a Turkish proxy, as it has maintained its own political agency. Political turbulence sparked in the wake of 2013–2015 when party leader Lyutfi Mestan developed close ties with Ankara, which triggered internal conflict within the MRF leadership and ultimately led to his expulsion from the party. Throughout much of the 2010s, Ankara openly supported a number of splinter groups from the MRF, most notably Mestan's DOST party. This policy drew criticism in 2017 from Bulgarian President Rumen Radev and interim Prime Minister Ognyan Gerdzhikov, who accused Türkiye of meddling in Bulgaria's internal affairs. The Bulgarian authorities expressed their discontent by expelling Turkish diplomats and subjecting Turkish vehicles to prolonged border and customs checks. These actions, along with the failure of Ankara-backed formations to achieve lasting electoral success, prompted Türkiye to abandon this approach and resume cooperation with the MRF. At present, Türkiye's influence over the MRF is stronger than ever and can be considered significant.

The MRF is currently going through a transformation after an internal split, followed by a largely successful attempt by business tycoon Delyan Peevski to consolidate the party around him. It remains to be seen how relations between Peevski and Ankara will develop, but it can be predicted that they will be at least adequate because Ankara could not take the chance of not having channels

of communication with the leading party representing the interests of the Turkish minority in a neighbouring country.

Over the past two decades Türkiye has provided support for various associations of migrants from Bulgaria operating in Türkiye, through which it channels the votes of Bulgarian citizens there (around 80–90,000 in some elections) to the MRF. This is a significant number against the backdrop of declining voter turnout inside Bulgaria. As Turkish researcher Ayşe Parla points out, citing various sources from her extensive field work, Türkiye would like to maintain a stable number of Bulgarian citizens of Turkish origin living in Bulgaria in order to be able to exert influence on domestic processes.

The policy pattern since the late 1990s is to tolerate irregular migration (and work) of Turks from Bulgaria to Türkiye, but to discourage their acquisition of Turkish citizenship. This is achieved by allowing only one visa per family, denying altogether visas to young unmarried men and women, and granting amnesty for overstayed visas and passports. Bulgarians are the only group to which such amnesties are given systematically. They have coincided in almost every instance with local or national elections in Bulgaria (2001, 2005, 2007, 2009, 2011) and were unofficially conditional on voting in Bulgarian elections. Additionally, because of Bulgaria's membership of the EU, a few ethnic Turks have been able to become MEPs, elected on the MRF party ticket. Potentially they could act in Türkiye's favour in the European Parliament (Parla 2019).

With regard to security issues, the picture is more complicated. The EU and NATO are the two main pillars of Bulgaria's strategic orientation. Apart from Türkiye, Bulgaria's largest trading partners are EU Member States, and the Union remains the primary source of foreign direct investment. NATO, in turn, is regarded as the key guarantor of Bulgaria's security. A notable discrepancy exists between the generally pro-Russian sympathies, for historical reasons, of much of the Bulgarian public and the stance of the political elite: with the exception of the relatively small »Vazrazhdane« (Rebirth) party – whose electoral support has not exceeded 15 per cent – all major parties are Euro-Atlantic in orientation. Bulgaria's approach to the Black Sea is fully aligned with both the EU's Common Foreign and Security Policy and NATO. It has accepted the deployment of US Stryker brigades on its territory, and a NATO coordination centre has been established in Varna, the country's »sea capital«.

The Turkish approach to Black Sea issues is based on a strict adherence to the 1936 Montreux Convention, which restricts the military presence of non-Black Sea states, allowing Russia and Türkiye to be the dominant powers. The Ottoman and Russian empires fought 13 wars, of which the Ottomans lost 12 and won only one, namely the Crimean War, thanks to their European allies. The Crimean War also marked the final fall of the Sublime Porte into

debt dependency on the European great powers. As a result, Turkish strategic culture deems Moscow, regardless of its current weakness or strength, as a neighbour that Türkiye must reckon with (Mufti 2009). For years, Türkiye has insisted on an approach towards the Black Sea region and the Balkans based on regional ownership.

Since the beginning of the war in Ukraine in 2022, Türkiye has been engaged in a delicate balancing act. It maintains relations with both Russia and Ukraine. Türkiye is interested in Ukraine's survival, supplying it with drones, ammunition and armoured vehicles. At the same time, as already mentioned, Ankara not only does not impose sanctions against Russia, but its trade and economic relations with Moscow are expanding significantly, as a result of the redirection of economic relations through Türkiye from countries that have sanctioned Russia. Türkiye is taking advantage of Russia's aggression against Ukraine to gain the upper hand in their competition on other fronts, such as Syria and the Caucasus. To make the picture even more complicated, Moscow's eventual defeat would deprive Türkiye of a valuable partner in a number of areas and of a country it can rely on when challenging Western hegemony. It is noteworthy that Ibrahim Kalin, the current head of Turkish intelligence, has expressed understanding for some of Russia's arguments about the world order in a number of statements. From Ankara's perspective, the war is accelerating the birth of a less Western-centric international order in which Türkiye would have greater influence (Hokayem 2023).

Since February 2022 Türkiye has cooperated with NATO to contain Russia, but has eschewed high-profile engagements to avoid provoking Moscow. A Turkish submarine, corvette and reconnaissance aircraft are on constant duty in the Black Sea, gathering intelligence that is shared with NATO and, for the past ten years, with Ukraine (Yinanç 2023). In June 2022 Ankara assumed the command of the maritime component of NATO's Very High Readiness Joint Task Force. Its Rapid Deployable Corps (NRDC-T), based in Istanbul, was designated a NATO Warfighting Corps (WFC) in December 2022, becoming the designated WFC for contingencies starting in 2023.

In January 2024, Türkiye signed an agreement with Romania and Bulgaria to establish a Mine Countermeasures Black Sea (MCM Black Sea) Task Group to jointly tackle drifting sea mines that have threatened Black Sea shipping since the start of the war. Türkiye also became a contributing nation to the NATO battlegroup in Bulgaria and sent four F16 aircraft and 80 personnel to augment the national air policing capabilities of Romania from December 2023 to March 2024 (Aydin and Aydintaşbaş 2025).

Simultaneously, Türkiye continues to oppose a permanent strengthening of the military presence of non-Black Sea states in the region. This is also because the Turkish navy

is currently the strongest in the Black Sea (boasting advanced frigates, submarines and an amphibious assault ship), a result of Turkish military build-up, the »Blue Homeland« doctrine to protect Turkish interests in maritime areas, and the losses inflicted on the Russian Black Sea Fleet by Ukraine.

However, these differences in approach between Ankara (mainly regional ownership) and Sofia (mainly multilateral actions within the EU and NATO framework) regarding the Black Sea region do not translate into negative effects when it comes to the dynamics of multidimensional bilateral relations. There are some standing issues between Bulgaria and Türkiye related to the demarcation of the border Rezovska River, other transboundary waters, claims for material compensation for the property of Bulgarian refugees expelled from Thrace, arising from the Ankara Treaty of 1925, and social rights of migrants from Bulgaria to Türkiye. Most of these issues, with the exception of Bulgarian claims for compensation, have been resolved in principle, despite some additional issues that arise periodically (changes in the delta of the Rezovska River, plans for construction of dams on the Turkish side and so on). The last meeting of the Joint Bulgarian-Turkish Commission on Unresolved Issues was in 2013, and since then the main dialogue format has been meetings at high and the highest levels, rather than at expert level. Practically speaking, these issues have been overshadowed by the refugee issue.

Between 2015 and 2020, the refugee issue played an important role in relations between the EU, the Balkan countries and Türkiye. Following the refugee crisis in the summer of 2015, an agreement was reached between the EU and Türkiye in March 2016, allowing Ankara to strengthen border controls in return for EU funds to support Syrian refugees on Turkish territory. In the following years, President Erdoğan has repeatedly publicly accused the EU of not fulfilling its financial commitments and has threatened to »open Türkiye's doors« to refugees and migrants wishing to reach European countries.

In early March 2020, a minor crisis occurred on the Turkish–Greek border in Thrace after groups of refugees and migrants – not only Syrians, but also Afghans, Pakistanis, Moroccans, Africans and others – were transferred to the border and attempted to enter Greek territory. Interestingly, Türkiye did not allow anyone to head for the Bulgarian–Turkish border because of the need to keep open the transportation artery to Western Europe. Furthermore, a migrant crisis would have led to a rise in xenophobic and far-right sentiments in Bulgarian society, which would have been undesirable for Ankara, threatening its soft power achievements over the past decade and destabilising Boyko Borisov's government, one of the few friendly politicians towards Türkiye in Europe. These considerations are still valid

today and could explain why Türkiye vigilantly guards the common border. The border crisis was resolved within a matter of days. Of great importance was the fact that the European Union and many individual Member States stood firmly behind Greece, sending police reinforcements and making clear that borders will be protected.

Since 2020, the topic of refugees has been absent from the speeches of the Turkish president. This is probably because of the realisation that such »blackmailing« (Mascareñas 2022; Baczynska and Chalmers 2020; Uzgel 2019) with the refugee card has already been exhausted. The permanent settlement of some Syrian refugees in Türkiye and the gradual but methodical repatriation of Syrians to their homeland by the Turkish authorities over the past few years means that Türkiye has lost its migration leverage in its relations with the EU.

Bulgaria was a strong supporter of accelerating the Euro-Atlantic integration of the Western Balkans during its rotating presidency of the Council of the EU in the first half of 2018. In February, Bulgaria signed a good-neighbourly agreement with North Macedonia, and in June, the Prespa Agreement was signed to settle the name dispute between Greece and North Macedonia, opening the door for the Western Balkan country's European integration. However, because the European Commission had decided to freeze EU enlargement until 2019, there was insufficient interest among the majority of influential Member States in this issue. Because of Bulgaria's limited ability to advance this priority on its own, momentum was soon lost. Subsequently, however, Bulgaria vetoed the framework for negotiations between the EU and North Macedonia if the so-called 5+1 conditions related to the cessation of hate speech against Bulgaria and Bulgarians in Bulgaria and in North Macedonia and respect for the rights of the latter were not met (Novinite 2025). Despite the compromise, reached with French mediation, relations between Skopje and Sofia remain tense. Skopje receives crucial support from illiberal actors such as Serbia (and tacitly Hungary), which also act as Russian and Chinese proxies in the region.

Sofia supports Türkiye's EU membership bid and, at the official level, does not view Türkiye's Balkan policy as in conflict with Bulgaria's foreign policy priorities. Bulgaria's approach to the Balkans aligns with that of the EU and NATO, aiming primarily to limit Russia's influence in the region. Sofia has stated this goal openly. A similar caution likely applies to China, as Beijing's strategic projects in Bulgaria have failed to materialise. Like most Balkan countries in need of economic development, Bulgaria welcomes Turkish investments on its territory. However, it draws a clear line regarding cultural influence, rejecting the expansion of Turkish soft power infrastructure, such as the establishment of a Yunus Emre Institute or a TİKA office.

Conclusions

The transformation of Turkish foreign policy under the AKP since 2002 has led to several marked changes in Turkish behaviour towards Southeast Europe. Recently, Türkiye's »soft power« elements – a constant characteristic of Turkish action in the region – have become less soft, reflecting the country's openly stated objective of being »strong on the ground and at the table«.

Various non-state actors (such as religious communities and humanitarian organisations), that have been present throughout the region have been replaced by Turkish state actors. Traditional institutions such as the Ministry of Foreign Affairs, TİKA and the *Diyanet* have either been sidelined to some extent (MFA), or have assumed a new and more pronounced religious ethos (TİKA, *Diyanet*). Additionally, new institutions for exerting soft power have been created, such as the Yunus Emre Institute and the Presidency for Turks Abroad and Related Communities (YTB).

Economic relations between Türkiye and the Balkan states are unbalanced in Türkiye's favour. Although still relatively limited, Türkiye's economic presence in the region has expanded significantly over the past two decades, while the Balkan states exert virtually no economic influence in Türkiye.

Reflecting a general trend in Turkish foreign policy, Ankara's *modus operandi* has changed over time, from multilateralism and actions in line with Western interests to unilateral actions. Today, Türkiye's Balkan policy reflects its overarching desire for strategic autonomy. This entails a pronounced »de-Europeanisation« of Turkish foreign policy, understood as a decrease in the degree of alignment with EU foreign policy, as expressed in sanctions, declarations and so on, but so far without openly running counter to or presenting itself as an alternative to the EU integration model. And Türkiye is finding the region to be a space in which it can act accordingly, whether in the form of »Neo-Ottomanism« or personalised relations between President Erdoğan and political leaders from the region.

Türkiye's growing influence presents both opportunities and challenges for Bulgaria's national security and foreign policy. Economically, the relationship is marked by interdependence, with Bulgaria serving as a vital transit route for Turkish exports to Western Europe while also benefiting from Turkish investment. At the same time, Ankara's soft power initiatives – ranging from religious and cultural activities to the mobilisation of the Turkish minority and diaspora – require careful monitoring, as they can affect Bulgaria's domestic political balance. The case of the Movement for Rights and Freedoms (MRF) demonstrates both the resilience of Bulgarian political institutions and Türkiye's capacity to shape developments through support for parties, associations and voting networks linked to Bulgarian citizens of Turkish origin. This

influence, though significant, has not undermined Bulgaria's core Euro-Atlantic orientation.

In the realm of security and regional policy, Bulgaria and Türkiye pursue different approaches, but their cooperation remains pragmatic and stable. While Sofia relies on NATO and the EU as the cornerstones of its strategic orientation, Ankara emphasises regional ownership, particularly in the Black Sea, and balances its relations between Russia, Ukraine and the West. Despite occasional tensions, bilateral relations have avoided major disruptions, as is evident in such areas as refugee management, trade and military cooperation.

Bulgaria's continued support for Türkiye's EU accession reflects a recognition that constructive engagement best serves stability in the Balkans, even as Sofia remains cautious of attempts to expand Turkish soft power on its territory. Overall, relations are characterised by a complex mix of interdependence, competition and pragmatism, requiring Bulgaria to remain vigilant but open to cooperation.

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Romania, the EU, and the Turkish Question

Dragoş C. Mateescu

Introduction: is Türkiye a reliable partner for the EU?

The challenges posed by an aggressive Russia in eastern and southeastern Europe, or by other players, such as Iran and its proxies, in tandem with a potential US disengagement from Europe under Donald Trump's second presidency, have led many to believe that Türkiye is slowly becoming a key foreign policy player. Its strategic influence in the region is increasing and Europe itself will have to rely on it more and more. But how accurate is this characterisation and how would this impact the regional policies of Romania and of the EU as a whole?

The complex international arena presents major challenges today and most actors, whether large, medium or small, are undergoing similar transformations. Türkiye is also going through a process of transformation of its own. The increasing assertiveness of its ruling regime, in power since 2002, is evident not only in the neighbourhood, but also farther afield, in Central Asia and Africa. The broad geography of its ambitions means that Ankara needs to develop new foreign policy tools, new institutional structures and new connections. In turn, the EU, including Romania, needs to adjust its own objectives, behaviours and expectations on the international stage in order to cope.

Our analysis must nevertheless start from the fact that Türkiye's international posture is itself impacted by regional and especially domestic challenges. On the home front, the Ankara regime's authoritarian turn has been increasingly evident over the past decade. This led to important losses for the ruling AKP-MHP alliance in the last local and parliamentary elections, and recent polls indicate the trend may be continuing in the same direction (Yeşilada 2025b). Following constitutional amendments narrowly approved in a controversial referendum in April 2017, decisions on government policy are now highly centralised in the presidential palace. But so is responsibility for falling living standards. Turkish citizens seem to be becoming increasingly aware not only of serious economic problems, but also of the even more serious problems concerning human rights and, especially, the functioning of the justice system. Although it is still difficult to envision an end to Erdoğan's rule, it is becoming clear that it is facing a profound legitimacy crisis, which may soon have palpable consequences. The ongoing campaign against the opposition may nevertheless lead to

its total elimination, with consequences difficult to imagine for a country that has never experienced a totalitarian dictatorship (Mateescu 2006).

At the regional level, the situation is dominated in the north by Russia's invasion of Ukraine, and in the south, by the demise of the Assad regime in Syria and Israel's enhanced position, with the concomitant decline of Iranian influence. The United States must be considered the decisive factor in this transformation, and both Washington and the EU have a major interest in the broader political geography of relative Turkish influence. These two actors are, nevertheless, global players and their interests in Türkiye's broader region are at a higher level.

Last but not least, Russia's aggressive approach leaves no doubt that it will remain the most serious threat to European security for the foreseeable future. In response to this threat and to the US re-evaluating its global commitments, the EU is working to develop its own defence strategy and capabilities through the €800 billion ReArm Europe Plan. Relevant economic actors in Türkiye, together with other non-EU actors, such as the United Kingdom, Canada or Norway, are viewed as potential participants in the process under the Safe Europe Instrument (SAFE) of the ReArm Europe Plan.

It is in this complex and challenging context that Ankara is pursuing its own ambitious foreign policy goals, while also going through a process of transformation as a regional actor. The analysis of the role Türkiye will play in the region must consider the aspects sketched above and treat them analytically as variables. The main question is nevertheless whether the Turkish foreign policy goals and actions are going to be independent variables, likely to decisively determine various evolutions in the broader region, including in Southeast Europe, or whether Ankara will have to limit its ambitions and adapt to higher order EU and US imperatives, with even broader global implications. In this latter case, Türkiye would have to concede that it is not yet an actor capable of imposing its own agenda entirely, but one whose influence is limited by, and must adjust to the global interests of more powerful actors.

The *main argument* here is that, contrary to some expert opinions, developments in Turkish domestic politics and in the region will tend to limit Ankara's foreign policy ambitions and gradually reduce its role as a strategic actor.

In other words, the erosion of the domestic legitimacy of the Erdoğan-AKP-MHP regime, together with the fact that its foreign policy ambitions now stretch far beyond Türkiye's capabilities, well into the zone of interest for global actors, should be understood as determining factors. In the same basis, the more assertive and transactional Türkiye becomes in pursuing its ambitious foreign policy goals, the more likely it is to encounter similarly transactional and presumably more effective opposition from its more powerful Western partners in Europe and North America. Foreign policy thinking in Europe, including Romania, should take these considerations into account and include them in future regional initiatives.

Domestic Turkish politics and the looming legitimacy crisis of the Erdoğan-AKP-MHP regime

Over the past decade, the regime in Ankara has been going through an increasingly serious legitimacy crisis. This has widened the gap between itself and Turkish society. The regime has gradually been developing its own domestic and foreign policy goals, an agenda increasingly divergent from the current needs of the population. The last local elections in 2024 saw the rival People's Republican Party (*Cumhuriyet Halk Partisi* - CHP) win overall at the national level against president Erdoğan's party, Justice and Development Party (*Adalet ve Kalkınma Partisi* - AKP). Tellingly, this victory was preceded by other important opposition gains in the 2019 local elections and the 2023 parliamentary elections against the alliance between the AKP and ultranationalist Nationalist Movement Party (*Milliyetçi Hareket Partisi* - MHP) led by Devlet Bahçeli. Moreover, most recent opinion polls indicate that the government's popularity is on the wane, although contextual variations may still be expected (Yeşilada 2025a; Yeşilada 2025b; *Turkish Minute* 2025). This represents a powerful variable, likely to determine the general political behaviour of the Erdoğan-AKP-MHP alliance both at home and abroad.

However, the quality of Turkish democracy has declined dramatically over the past decade. It has been gradually subordinated to the authoritarian regime of Recep Tayyip Erdoğan and his AKP, with support from the ultranationalist MHP since the parliamentary elections of November 2015. This decline is underlined in all annual reports by the European Commission on Ankara's performance on the criteria for full EU membership. They exhibit serious deficiencies and structural shortcomings in the functioning of Turkish democracy under the presidential system, especially after the Erdoğan-AKP-MHP government unleashed the – still ongoing – crackdown on

perpetrators of the failed *coup d'état* in mid-July 2016, concomitant with systematic campaigns against the opposition media and politicians. All those shortcomings remain unaddressed and there is no indication that this will change.¹ The implementation of legislation instituting the presidential system, starting in January 2018, has transformed the presidency into an unchecked executive mechanism with authority over all governmental institutions. Türkiye is now regarded as an authoritarian state, whether it be qualified as competitive, electoral or something else (Akçay 2020; Borsuk and Levin 2021; Yücel 2024).

The problems with this political setting are multiple, as witnessed over recent years. They include the poor management of the economy and finances, and policies dominated by a counterproductive conservative approach in education, science, culture and elsewhere. The upshot is a steep decline in living standards, the accelerated emigration of educated people, and above all, increasing public concern about the degradation of the justice system. According to an ASAL poll in early 2025, more than 70 per cent of the Turkish citizens interviewed answered «no» when asked whether justice was still delivered in their country (Gazete Duvar 2025). In the Rule of Law Index for 2024 issued by the World Justice Project, Türkiye reached its lowest ever position, ranked 117 out of 142 countries and jurisdictions evaluated around the world (World of Justice Project 2025). It can be no surprise then, that Türkiye is now only formally engaged in accession negotiations for EU membership. The process is de facto frozen until credible reforms are seen to have restored the functioning of the judiciary and democracy. A special report from April 2025 by the rapporteur for Türkiye to the Committee on Foreign Affairs at the European Parliament also underlined democratic backsliding over the past two years in terms of human rights and the rule of law (European Parliament 2025).

Despite the government's diminishing popularity, there are currently no signs that the authoritarian trend is reversing. Although Türkiye is one of the oldest members of the Council of Europe (CoE) and party to the European Convention on Human Rights, it still accounts for the largest number of complaints before the European Court of Human Rights under the Council of Europe. By May 2025, the 21,200 complaints concerning Türkiye awaiting resolution represented 35.2 per cent of the total number filed with the court from all Council of Europe member states (Stockholm Centre for Freedom 2025). The Turkish judiciary, incapable of delivering justice under the presidential system, seems to have no choice but to bow to the all-powerful executive branch. Furthermore, the opposition crackdown continues, with the media critical of

¹ For all annual reports, see the »Türkiye« page on the European Commission's site for Enlargement and Eastern Neighbourhood policy, at: https://enlargement.ec.europa.eu/enlargement-policy/turkiye_en

the government as the main permanent target. More than 90 per cent of media outlets are controlled by the regime in Ankara and independent media have become rare, suffocated by various types of government pressure. Türkiye now ranks 159th out of the 180 countries evaluated by Reporters Without Borders with regard to media freedom (Reporters Without Borders 2025). Persecution of media outlets and of individuals critical of the government is widespread (Atabay 2025; Turfent 2025).

Opposition parties are also now openly under attack. After years during which political representatives of the Kurdish minority were the main targets – and thousands remain in prison – the main opposition party CHP is now facing dozens court cases. While the prosecutors accuse CHP of (alleged) internal corruption and illegal practices in the 2023 internal elections for the party leadership, close observers suggest that the party is in fact paying for its gains at the national level in the local elections of 2019 and 2024 against AKP rivals. The campaign, still ongoing at the time of writing, started in March 2025 with the arrest and prosecution for alleged corruption of Ekrem İmamoğlu, mayor of Istanbul and the most credible opposition candidate so far against incumbent Erdoğan for the presidential elections, set to be held in 2028. Since March, around 17 other major CHP figures and some of their lawyers and other associates from Istanbul and elsewhere in Türkiye have been accused of corruption and incarcerated. Critics accuse the government in turn of »manufacturing foes« and instrumentalising the justice system to eliminate any opposition ahead of the next elections in 2028 (Ozerkan 2025). Given that the campaign is still being waged at the time of writing – for example, the police stormed the CHP headquarters in Istanbul on 8 September (Akin 2025a) – it is no exaggeration to say that Türkiye's ruling regime is close to eliminating all forms of opposition, with no return to democratic politics in sight. Having said that, such actions also indicate a profound legitimacy crisis for the regime, which feels it has to resort to violent means to impose an agenda that is increasingly remote from the population's current needs. It is estimated that thousands of people currently held in Turkish prisons qualify as political prisoners (Latschan 2025).

In this domestic context, with a dysfunctional judiciary under an authoritarian presidential executive that resorts to violence against the opposition, Ankara's current attempt to close the dossier on the so-called »Kurdish question« is a serious challenge. The issue is seen as fundamental for the future of Turkish democracy. It is a historical test case for the Turkish state's capacity to develop from a traditionally closed apparatus pursuing its own survival into a framework of democratic institutions serving the citizens and protecting their rights, including cultural rights.

For almost a century now, Türkiye's policy on the Kurdish issue has been built on nationalism and national security concerns, treating minority demands as security threats

rather than as political issues capable of being handled by democratic politics. Although the current »peace process«, branded »Türkiye without terrorism« by the government, initially seemed different from the previous two, especially after high-ranking PKK members ceremonially threw their weapons into a fire in mid-July 2025 and after a broad commission started working on the process in parliament, the government's position seems still mired within the confines of nationalist and security thinking. It is symptomatic that people invited to speak to the respective parliamentary commission, whose purpose is to propose a political and legislative solution to the Kurdish question, were forbidden to do so in Kurdish (Zaman 2025).

For the political representatives of the Kurds and other minorities in parliament, the success of the peace process is conditional upon Ankara explicitly recognising, by law, the existence of all ethnic and religious minorities, Kurds included, and granting them rights based on the principle of equal citizenship with the Turkish majority. All this is viewed by minority representatives (*Rudaw* 2025), including leaders of the heterogeneous Alevi group, which numbers in the millions (ANF News 2025), as part of a broader and more profound process, which would have to culminate with the establishment of a truly democratic Turkish polity (Mateescu 2025; Yılmaz 2025).

It is difficult to imagine, however, how such demands can cohabit with the obstinate anti-minority nationalism of the Erdoğan-AKP-MHP regime in Ankara and its constant push for unchecked control over all branches of government, together with its systematic campaigns against any form of opposition. It is also difficult to imagine how Ankara can make peace with its Kurdish population while at the same time insisting on its current hostile policy toward Kurds and their representatives in north-east Syria. This represents a major contradiction that may decisively undermine the credibility and legitimacy of the Erdoğan-AKP-MHP regime, with potentially serious consequences for both Türkiye and Syria, not to mention for regional stability. Adding to this the tensions already induced by poor economic and financial policies, together with its current standing in the opinion polls, a broader picture emerges in which Türkiye and its ruling Erdoğan-AKP-MHP alliance may soon have to address existential questions. Against this background, the distance between the regime and Turkish society is growing and so is public discontent. European partners, Romania included, should take this reality into account in their policies on Türkiye.

Türkiye in the region: more doubt than certainty for policy planners in the EU and Romania

Evaluations of Turkish actions on the international stage must start from the fact that, following its transformation from a parliamentary democracy into a presidential republic at the authoritarian end of the spectrum, the

country is no longer a credible candidate for EU membership. Ankara has already clearly shown that it is no longer willing to accept and implement reforms in line with EU membership criteria. Instead it is pursuing a foreign policy agenda that is often at odds with the interests of its traditional Western partners in Europe and North America.

Examples include developments in north-eastern Syria, Libya and the Eastern Mediterranean, where Turkish involvement collides with the interests of the US and/or the EU, including individual Member States, particularly Greece and Cyprus. Ankara does cooperate with its neighbours on some issues, for example, with Romania and Bulgaria in the de-mining mission in the Black Sea, along with other activities under the aegis of NATO. However, it does not support projects aimed at opening up the Black Sea region to global trade. The best example of this is the Organization of Black Sea Economic Cooperation (BSEC), which does not contribute much to the integration of the economies in the region with those in the Mediterranean and beyond. Türkiye also vehemently opposes any alteration of the Montreux Convention (1936), although its interpretation of specific provisions in that document hinder the opening up of the Black Sea to the world. Moreover, Erdoğan personally supports the Istanbul Canal project linking the Black Sea with the Sea of Marmara, which is being promoted without consultation with Romania, Bulgaria and other traditional partners, which may eventually be affected by this enormous endeavour.

In Africa, Türkiye under president Erdoğan has aggressively pursued an agenda sometimes described by AKP leaders as contrary to French colonial history and challenging the influence of Paris on the continent. The competition between these two actors extends into the Eastern Mediterranean and the Middle East (Tull 2024; Gasco and Fournillon 2025). It is also significant that Türkiye strongly opposes major projects such as the India-Middle East-Europe Economic Corridor (IMEC), or energy links between the Middle East (Israel and Egypt) and Europe (via Cyprus and Greece). These would not pass through Turkish territory, but that is because they are more feasible as undersea projects and, moreover, would contribute to the diversification of energy sources for Europe away from Russia.

Türkiye is also obstructive on trade in relation to traditional partners in Europe, including Bucharest. After formal accession to the EU in January 2007, Romania experienced unprecedented economic development. The EU's single market became the most important trading space for Romanian firms. However, the situation is less favourable with regard to trade outside the single market and deficits have increased with non-EU partners. Romania's largest deficit continues to be with China, reaching 5.4 per cent of its total trade deficit in the first semester of 2025 (Jordan 2025). The deficit with Türkiye, which is among Romania's

most important non-EU trading partners, comes very close to that figure and is the result of an upward trend for the past five years or so. The official figures for 2024 from national statistical institutes in both countries indicate that Romania registered a trade deficit with Türkiye of 4.1 billion US dollars.

Although many complex factors have contributed to this situation, one is particularly disturbing, namely Ankara's excessively protectionist approach. Although Türkiye has been in the EU customs union since 1995, Ankara still imposes heavy tariffs on selected imports from EU countries, including Romania, while encouraging Turkish exports to the EU's common market, with Romania acting as an important gateway westward. The staunch Turkish resistance to any adjustment of this situation is even more disturbing for Bucharest.

On 21 May 2024, an important Romanian delegation led by Prime Minister Marcel Ciolacu visited Ankara at the invitation of the Turkish President. Held within the framework of the Strategic Partnership initiated by the two countries in 2011, the meeting culminated with the signing of a political declaration establishing the High-Level Council for Strategic Cooperation. The heads of the two governments and eleven ministers from each side signed several accords, protocols and memoranda in various fields of cooperation. The outcome was nevertheless rather disappointing. Members of the Romanian diplomatic team attending the event admitted that their Turkish counterparts could not be persuaded to allow more Romanian products into the Turkish market at reasonable tariff levels, with very few and fairly insignificant exceptions. Overall, the Turkish side did not seem willing to negotiate.

This should be considered in the broader context of Türkiye's relations with its traditional partners in Europe and North America, which many have labelled »transactional«. However, decades long developments in Turkish foreign policy may suggest a different terminology. The hostility to Western leaders, or states and institutions, manifested by the current regime in Ankara on a few occasions is notorious. The most famous were the harsh anti-Western declarations by the Turkish side during the Gezi protests of May–June 2013, the November 2015 terrorist attacks in Paris, or in the aftermath of the failed coup in July 2016. These were followed by the »sofagate« episode, when Ursula von der Leyen, president of the European Commission, was humiliated by the Turkish president at his palace in Ankara in April 2021. In the same category falls the apparently irrational resistance to Finland and Sweden joining NATO. Türkiye's acquisition of S400 missile defence systems from Russia can also be seen as a gesture of defiance to Western partners, along with the refusal to implement sanctions after Russia's invasion of Ukraine. Additionally, it should not be forgotten that Türkiye has lent its support to groups or solutions that

clashed with and continue to obstruct European or US interests in the South Caucasus, Syria, Libya and elsewhere in the Sahel and West Africa (Tastekin 2020).

The Turkish stance on energy and trade corridors in the Eastern Mediterranean and its aggression towards Greece and Cyprus in this context go beyond the old rivalry between Greeks and Turks. Along with the public manifestations already mentioned, this stance should be interpreted rather as hostility towards Europe as a whole. All EU Member States, Romania included, have been denied access to alternative gas, electricity and other resources, not to mention to optimised trade and logistical connections towards India through the Eastern Mediterranean and the Middle East.

As of August 2025, Ankara continues to block research vessels conducting seabed surveys for the laying of the optical fibre cable planned to connect Europe to Saudi Arabia via Greece and Cyprus (East to Med Data Corridor, EMC). Türkiye also does everything in its power to impede or even cancel regional cooperation on other major projects supported by influential actors, such as the EU, the US, India, oil-rich states in the Middle East, and many others. Among such projects are the Eastern Mediterranean Gas Forum (EMGF), the India-Middle East-Europe Corridor (IMEC), the electricity connection known as the Great Sea Interconnector (GSI) from Egypt and Israel to Cyprus, Crete and continental Greece, and the Greece-Egypt (GREGY) electricity cable interconnection (Mertz 2020; Nedos 2025). All these projects are supported by the EU because, beyond providing a crucial alternative to Russian energy supplies for all Member States, they can also connect Cyprus to the European energy grid. Although EU territory, the island is not yet integrated and produces more than 80 per cent of the electricity it consumes in powerplants using imported oil and gas. Only recently did the Republic of Cyprus manage to introduce renewable resources; wind and solar power covered around 20 per cent of demand in 2024 (Tsagas 2025). The US, especially under the Trump administration, supports all these efforts and has developed close defence cooperation with Greece and, more recently, Cyprus. Overall, the White House has subsumed good cooperation with all actors in the Middle East to a general approach under the umbrella of the Abraham Accords, an initiative of the first Trump administration aimed at enhancing free trade with the participation of US firms.

Ankara, however, considers that all the projects listed above represent attempts to bypass its territory, which it views as the natural, historical and unavoidable bridge between Asia, the Middle East and Europe. However, a bridge is only a bridge if it is convenient and comfortable to cross, and Türkiye has made every effort to prove the contrary in recent years. It continues to promote the Memorandum signed in 2019 with the Tripoli-based, internationally-recognised Libyan government. However, this memorandum is now deemed void and null by

Greece, Egypt, Cyprus and their allies, including the EU, who criticise it for infringing on the sovereign rights of third states and violating the UN Convention on the Law of the Sea (UNCLOS). The Turkish-Libyan memorandum would allow Ankara to invoke its rights to hinder seabed surveys and cable laying operations, thus discouraging investments and planning for the relevant projects.

This obstructive regional policy is directly connected to Ankara's standard position regarding the Cyprus issue: it continues to support a two-state solution while using the situation on the island to promote what it sees as Turkish interests in the Eastern Mediterranean. In the long run, however, this might prove to be a gross miscalculation because it simply inhibits it from achieving its stated objective of becoming an energy hub in the Middle East, while other regional actors push for the very projects to which Ankara is hostile simply because sea routes are economically preferable to the land route through Anatolia (Farouk 2019; Sabry 2020). In response to Turkish resistance and taking advantage of the souring relations between Türkiye and its traditional Western partners, Greece has significantly stepped up its defence cooperation with the US (Argiri 2025) and has enhanced cooperation with Israel, Egypt, Cyprus, and other regional actors, while strongly promoting its interests in the EU (Akin 2025b).

Other EU states are also likely to realise that the Ankara regime is not simply transactional in dealings with international partners, but rather obstructive, even confrontational on numerous issues. Türkiye's obstructive attitude towards the exploitation of gas reserves in the Eastern Mediterranean is particularly disturbing given the importance of such reserves for European efforts to find alternatives to Russian resources. Ankara's attitude to IMEC should be understood in the same light. The corridor not only concerns logistics, but also energy transfers from the region to Europe, and more precisely exploitation of the huge potential of the Middle East for solar energy, which is a green product always in demand on the European market. Turkish obstructiveness affects planners and investors together with sellers and buyers of that energy. For Romania and other countries in Southeast Europe, access to high-tech trade routes such as the IMEC and to resources available in the Middle East would bring not only economic, but also political benefits. Reducing dependence on Russia would be a historical and strategic achievement for all countries in the eastern half of the continent, including those in Southeast Europe.

Regarding Türkiye's importance for European security, multiple considerations suggest themselves, ranging from energy security to the safety of navigation and commerce, together with various aspects of military cooperation. Much of this already takes place within the framework of NATO, with Turkish participation in air policing from the Kogălniceanu airbase, or the de-mining mission in the Black Sea. In all these initiatives Türkiye cooperates well

with Romanian, Bulgarian and other NATO and non-NATO partners. However, Ankara has been fairly reticent concerning the Black Sea Submarine Cable (BSSC), which will transfer green energy from the Caspian region and later from Central Asia to Europe without passing through the Turkish mainland (Hajiyev 2025). As in the case of resources from the Eastern Mediterranean, Ankara is generally reluctant to support any alternative to Russian energy that does not include the Anatolian Peninsula en route to Europe. It is probably only the presence and interests of its ally Azerbaijan in the BSSC project and the fact that it can go through its territorial waters in the Black Sea has led Türkiye to refrain from opposing this project more aggressively.

Concerning participation in European defence programmes, it should be noted that Turkish businesses, rather than the Turkish state, are already in talks on participation in European programmes. The technical details of the Safe Europe Instrument (SAFE) of the ReArm Europe Plan are clear on that issue. And important Turkish firms are already involved in cooperation schemes with European counterparts to produce weapons, ammunition, various types of vehicles and other military equipment. In the specific case of Romania, an accord was signed and is currently in the implementation phase between Otokar (Türkiye) and Automecanica Mediaş (Romania) to produce over a thousand armoured vehicles in the Mediaş-based factory (Curtifan 2025). Many other forms of cooperation are at various stages of implementation, including Romania's acquisition of Bayraktar TB2 drones (Marica 2024), a light corvette (Moldovan 2025), and possibly others.

However, all of this reflects the commercial interests of the companies involved in the projects, which also comply with NATO standards thanks to Türkiye's contribution, and not necessarily political choices. As a state, Turkey keeps its distance from the EU and shows no signs of returning to adherence to fundamental EU values and, in particular, its single market. It is thus very difficult to imagine when and under what conditions Türkiye's candidate status might be revived. It has always been up to Ankara whether it wants to meet the criteria for EU accession and integration. Until that process restarts based on credible reforms, the Turkish state will probably remain outside the relevant calculations, plans and decisions about common European security, while specialised Turkish firms will have to enter into cooperation schemes with EU-based ones, including from Romania, to deliver their products to the single market. EU decisions on the freezing of accession negotiations and SAFE conditions as they apply to Türkiye will reflect strategic EU choices. Along with its own recent experiences with the Turkish side concerning, in particular, access to the Turkish market for Romanian products, Bucharest may also have to take the Union's strategic choices into consideration when recalibrating its own engagement with Ankara.

Conclusions and possible answers

The aim of this paper is to draw attention to a number of aspects that are essential in any effort to (re)think relations with Türkiye in the current international and regional context. To that end we have tried to paint a more realistic picture of this key regional actor, which occupies a formidable geostrategic position, but may soon be confronted by serious endogenous and exogenous challenges. Numerous domestic developments indicate a looming legitimacy crisis for the ruling regime in Ankara. On the international stage, it is highly possible that the transactional, often obstructive and sometimes confrontational stance of this regime will be subject to similar responses from an increasing number of actors on sensitive regional issues. In the end, the political geography of Turkish foreign policy ambitions has extended into zones of explicit interest for actors with a global vision and capabilities. Promoting Turkish interests in the projects supported by such actors is one thing, but obstructing them is a different matter, especially in such an extreme way. On this basis, it is to be expected that the imperatives of the EU, the US and their partners in the Eastern Mediterranean and the Middle East will eventually prevail over Turkish ambitions and tactics.

On the domestic front, although it is still difficult to envisage an end to the Erdoğan-AKP-MHP regime, a profound legitimacy crisis is looming and that may have palpable consequences soon. With rare exceptions, opinion polls indicate the decline in popularity of a government that now openly assaults the opposition for a lack of any alternative. The peace process with the Kurdish population, which is the third such attempt in fifteen years, is also bound to fail if Ankara does not offer the explicit recognition of all ethnic/linguistic and religious minorities in light of the fact that millions adhere to a Kurdish and/or Alevi identity. This would, however, work only if accompanied by efforts to fundamentally alter Turkish policy in Syria. In short, Ankara must learn to accept the idea, essential for the political representatives of the Syrian Kurds, that they have a right to recognition by Damascus and to democratic autonomy in a decentralised Syrian state. These are also central demands of the Kurds in Türkiye. Meeting these demands is crucial to the democratic future of both Türkiye and Syria, and for regional stability.

Foreign policy thinking in the EU, including Romania, should regard the aspects underlined here as potentially affecting, on one hand, the domestic stability of the ruling Erdoğan-AKP-MHP regime, and on the other, its stance in international affairs and in the region, including in relation to partners in Southeast Europe. On both fronts, tensions and challenges are mounting and the government in Ankara may have to change course fundamentally, or disappear under pressures more intense than its own capacity to survive.

In particular, the Kurdish issue has become more serious than ever. Solving it would demand fundamental change in the collective Turkish mentality, which has been shaped for generations by anti-Kurdish nationalism, passing for patriotism. This presupposes political costs that the current alliance ruling Türkiye may not be willing to pay, to the extent that Kurds in both Türkiye and Syria demand the formal, legal recognition of their identities and of their right to some degree of autonomy within the borders of the two countries. Both Ankara and Damascus lack a history of autonomy, or at least decentralised administration based on cultural differences, and may eventually choose to cooperate against Kurdish demands on both sides. Such an approach, in turn, may destabilise the entire region, with negative consequences for Europe, at least concerning migration.

Romania and some other EU Member States, including Germany, have significant experience regarding the accommodation of minorities and minority politics within their political systems. This experience is currently not part of the foreign policy tools employed by Bucharest, which inexplicably has been hesitant to take advantage of many of its achievements in dealings with partner countries. Such experience should nevertheless be drawn on, possibly in coordination with other European actors that can provide relevant expertise. Germany, the Baltic countries or European countries that have developed successful devolution models could join together with the Council of Europe, in coordination with the European Commission. Such collaborative efforts could help to legitimise and thus reduce the political costs of steps in the direction of societal pacification and integration through good practices in the implementation of minority rights.

Renouncing the security approach and fully embracing a political discussion of the purely political issue of minorities would be a historic achievement for Ankara. And Türkiye can benefit from the experience of Bucharest with this sort of issue, not only in solving the Kurdish and Alevi issue in itself, but also with regard to the related reforms that Türkiye needs to resume in the context of negotiations on EU accession. However, that is conditional upon Ankara being ready to return to those negotiations and meet the membership criteria. Appealing for European and/or Romanian assistance in legitimising the political process necessary to resolve the Kurdish issue would be a positive sign in this context and may represent a decisive step towards Türkiye's eventual European integration.

Until then, defence cooperation between Romanian and Turkish firms should be encouraged. Such cooperation is already successful in many other cases, in which important firms from Italy, Spain, Poland, Ukraine, the US, the UK and elsewhere collaborate with their Turkish counterparts. In the case of Romania, there is also the experience of contracts already in various phases of implementation, as already mentioned. Moreover, such cooperation may also help to boost confidence on both sides regarding the

adoption of measures to reduce Romania's trade deficit with Türkiye. To the same end, Romanian foreign policy should be more connected to and prepared to influence EU-Türkiye discussions on the possible replacement of the customs union, in place since 1995 and in great need of updating as a free trade agreement. This again depends on the Turkish side's willingness to adjust to the rules of the EU and its single market as the much bigger partner, one with a long history, hundreds of millions of consumers, and an enormous network of global free trade connections.

Finally, regardless of whatever decisions may be forthcoming from the White House on US commitments to European security, the dialogue with Türkiye should be intensified for the benefit of Ankara, Bucharest and Brussels, along with other EU partners. Romania can play a role in (re)building bridges between Türkiye and Europe, but to that end its foreign policy requires improved and focused financing, with the clear aim of extracting benefits for Romanian firms and the economy in general. Turkish firms should be encouraged to enhance cooperation with their Romanian counterparts in joint ventures able to qualify for more EU programmes, but also in connection with the EU imperatives regarding major projects. Bucharest can and should be involved in efforts to encourage Ankara to cooperate, especially on projects for the exploitation of energy resources in the Black Sea, Caspian and Central Asia corridor, but also in the Eastern Mediterranean and the Middle East. As shown in this paper, this would work for its own benefit as an energy consumer from the European market. In the end, a better understanding of its own interests as part of the EU and NATO may help Romania and its diplomacy to focus more clearly on what it needs to think and do in relations with Türkiye. This would represent a valuable Romanian contribution to enhanced dialogue with Ankara. Hopefully, such enhanced dialogue may also help to transform Türkiye into an actor more open to discussing major themes of cooperation with Europe. Until then, Bucharest, Brussels, Berlin and elsewhere in Europe should pay more attention to Türkiye's changing role in the region. At present, Ankara's ambitions seem to rely more on increased military capabilities, coercive tactics and overall confrontation. This indicates that Turkish government circles are dominated by a logic of confrontation, not the logic of cooperation that developed in the Western world after the Second World War.

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Türkiye and Serbia: unyielding pragmatism

Igor Novaković

Introduction

Türkiye is not an outsider to the Balkan region, unlike a number of other external actors. Geographically, it belongs to the Balkans, but it also shares deep historical and cultural ties rooted in the legacy of the Ottoman Empire, which once ruled much of the peninsula. The region's Muslim populations have maintained connections with Türkiye, particularly after the fall of communism and during the Yugoslav wars in the 1990s. Furthermore, many Turkish citizens trace their ancestry to the (Western) Balkans, which makes Türkiye's domestic political discourse especially sensitive to political developments in the region.

During the 1990s, Türkiye largely aligned its approach to the Balkans with the policies of the United States and the European Union. This began to shift in the 2000s, however, when Ankara articulated a new foreign policy vision that emphasised the country's geopolitical, economic and cultural potential. This shift created an opportunity to reassess and elevate Serbia–Türkiye relations. The process of re-evaluation was not without difficulties, but a new framework for cooperation emerged following the 2016 coup attempt in Türkiye, when Serbia was among the first states to express support for President Erdoğan. This gesture ushered in deeper cooperation, facilitated by Türkiye's increasingly personalised foreign policy style, which Serbia embraced as it aligned well with its own »multi-vector« approach.

This foundation has sustained bilateral relations ever since. Nonetheless, ongoing geopolitical transformations – most notably the second phase of Russia's war in Ukraine – have reshaped Türkiye's broader strategic orientation, a trend that had already been developing since the end of the Cold War in response to major international processes, such as EU enlargement, the Arab Spring and China's Belt and Road Initiative. Against this backdrop, this paper evaluates the scope and character of Serbia–Türkiye relations, their impact on Serbia's national security and foreign policy priorities, and their role within Serbia's broader multi-vector foreign policy framework.

Serbia's multi-vector foreign policy

Ever since Kosovo's proclamation of independence in 2008, Serbia has pursued a foreign policy markedly different from

that of other EU candidate countries in the Western Balkans. While not abandoning its EU accession bid, Serbia sought alternatives to overcome the diplomatic isolation it faced in the late 2000s, strengthening relations above all with Russia and China. This search for external partners was also driven by the 2008–2009 global financial crisis, which highlighted the need for new sources of capital and investment. Additionally, Serbia's openness to third countries was shaped by the legacy of the Yugoslav wars, the 1999 NATO bombing of the Federal Republic of Yugoslavia, and other historical factors.

In parallel, in 2007 Belgrade abandoned its previous ambition of joining NATO, declaring military neutrality toward »existing military alliances« (Rezolucija Narodne skupštine Republike Srbije o zaštiti suvereniteta, teritorijalnog integriteta i ustavnog poretka Republike Srbije) and limiting its cooperation with NATO to participation in the Partnership for Peace (PfP) programme (Republika Srbija – Prezantacioni dokument 2007). At that time, while searching for alternative partners, Serbia articulated a so-called »four-pillar« foreign policy, which emphasised relations with the EU, Russia, China and the United States, without establishing a formal hierarchy among them (Novakovic 2013). With the rise of a new political leadership under the Serbian Progressive Party and Aleksandar Vučić, this approach evolved into what became known as a »multi-vector« foreign policy. The policy signalled Serbia's continued commitment to EU membership while simultaneously seeking to preserve and deepen relations with other global actors until accession was achieved. In domestic discourse, the Kosovo question – often framed as the preservation of »sovereignty and territorial integrity« – remained just as important as EU accession. In practice, this translated into intensified political, economic, energy and even defence cooperation with both Western and non-Western partners.

Today, Serbia maintains free trade agreements with the EU, CEFTA 2006 (as a member), China, the Eurasian Economic Union (having signed its first bilateral agreement with Russia in 2001), Türkiye and EFTA. In defence and military cooperation, beyond NATO and the EU, Serbia has developed extensive ties with Russia (partially suspended since the 2022 invasion of Ukraine) and has acquired military equipment from a wide range of suppliers, including Russia (tanks, aircraft, air-defence systems), France (missiles, radars, aircraft) and China (air-defence systems). Serbia has also become one of the most active supporters

of cooperation with China, both bilaterally and through the Belt and Road Initiative and the »16+1« framework. Belgrade has further engaged other partners, such as Azerbaijan, the UAE and Türkiye, particularly as sources of loans and infrastructure projects.

However, Serbia's EU path has remained fraught with challenges. One could argue that the very rationale for adopting a multi-vector foreign policy lay in the uneven pace of EU integration and the political conditions attached to it. Chief among these was the requirement for full normalisation of relations with Pristina, which significantly influenced the rhythm of negotiations (for example, the opening of accession talks followed the signing of the 2013 Brussels Agreement). Moreover, between 2008 and the outbreak of the full-scale war in Ukraine in 2022, the EU's approach to enlargement was far less enthusiastic than in the early 2000s. This was partly due to »enlargement fatigue« brought on by multiple crises – including the 2008–2009 financial crisis, the 2015 migrant crisis and Brexit – as well as concerns about the EU's institutional capacity to absorb new members. The behaviour of certain Member States, most notably Hungary, in the context of shaping the EU's Common Foreign and Security Policy (CFSP) (Nguyen 2024), further reinforced these concerns. As a result, the EU largely prioritised stability in the Western Balkans, often through cooperative arrangements with local leaders – a dynamic frequently labelled »stabilitocracy«. (Prelec 2020).

In this context, Serbia's multi-vector policy became increasingly burdensome for its EU ambitions, particularly as global politics shifted toward multipolarity. Early signs of this tension emerged with Russia's annexation of Crimea and the outbreak of the war in Donbas in 2014. Since then, Serbia has consistently resisted aligning with most CFSP declarations and restrictive measures against Russia and China, maintaining that full alignment would come only upon EU accession, and that in the meantime it had the sovereign right to conduct an independent foreign and security policy (Tanjug 2022). Since 2022, however, the EU has renewed its interest in Western Balkan integration, whether through full membership or a phased approach (for example, participation in the Schengen Area or the Single Market) (Becker 2024). For Brussels, political and security alignment has become crucial, as it demonstrates that candidate countries share the EU's strategic interests. Despite these renewed overtures, Serbia continues to signal its commitment to maintaining a multi-vector approach.

Serbia–Türkiye: from limited-scope relations to »zero problems with neighbours«

With the outbreak of the Yugoslav wars – particularly in Bosnia and Herzegovina (BiH) and Kosovo during the 1990s – Türkiye »returned« to the region, adopting approaches largely aligned with those of the West. In

practice, Türkiye framed its engagement within the broader NATO-led approach, while simultaneously strengthening relations with countries in the region with significant Muslim populations (BiH, Kosovo, Albania, and North Macedonia) (Petrović and Reljić 2011). Relations with Serbia, by contrast, were neither prominent nor strategically developed. Ankara appeared content to continue its Cold War-era role without fully utilising its potential, while the prospect of EU integration also acted as a guiding framework for Turkish foreign policy. Nevertheless, the wars in the former Yugoslavia profoundly affected both Turkish public opinion and the political elite, due to historical legacies, cultural ties and family connections – what Aslı Aydıntaşbaş has described as Türkiye's »emotional hinterland« (Aslı Aydıntaşbaş 2019).

Following the fall of Slobodan Milošević in 2000, Serbia's new ruling elites firmly committed the country to European and Euro-Atlantic integration. The 2003 Thessaloniki Summit, at which the EU promised eventual enlargement to the Western Balkans, reinforced this orientation. Consequently, relations with third countries were not a priority at the time. Russia had largely withdrawn from the region (signalled by its departure from KFOR in Kosovo) (Nato.int 2003), while China had not yet launched the Belt and Road Initiative. From 2006 onwards, however, two parallel processes laid the foundation for a new phase in Serbia–Türkiye relations.

The first was the Kosovo issue, which came to the forefront in 2005 when the UN initiated efforts to find a comprehensive settlement. In 2007, Serbia finally rejected the plan proposed by UN Special Envoy Martti Ahtisaari, and Kosovo declared independence in February 2008 (Türkiye was one of the first countries to recognise it). This development became a major stumbling block in Serbia's EU integration process, which prompted Belgrade to seek closer bilateral ties with other partners, initially Russia and later China, and eventually Türkiye. At the same time, the global financial crisis of 2008–2009 hit Serbia hard, leading to a sharp decline in foreign direct investment (FDI) inflows after the relatively prosperous period from 2001 to 2007. This further motivated Belgrade to pursue alternative sources of capital, loans and investment, often outside Western channels.

The second process was Türkiye's own foreign policy reorientation. During the early years of the Justice and Development Party (AKP) under Recep Tayyip Erdoğan, Ankara prioritised domestic reforms and economic growth. As EU accession prospects stalled, however, Türkiye sought to redefine its international role in the post-Cold War era. This reorientation was spearheaded by Foreign Minister Ahmet Davutoğlu, whose 2001 book *Strategic Depth* laid out a vision for Türkiye as a regional power drawing on its Ottoman legacy, its strategic location at the crossroads of civilisations, and its economic, military and demographic potential. Rejecting the notion of Türkiye as merely the »easternmost pillar« of the West, Davutoğlu argued for a

more autonomous role, positioning the country as a regional hub.

This vision crystallised into the »zero problems with neighbours« doctrine, which aimed to foster positive relations with all of Türkiye's neighbours and elevate these ties to a new level. While ambitious, the policy encountered some scepticism in the Balkans, where suspicions lingered regarding Ankara's ultimate objectives, often characterised as »Neo-Ottomanism«. Serbia in particular remained cautious, as Türkiye was widely perceived as the protector of Bosniaks in the region and had been among the first countries to recognise Kosovo's independence.

Nonetheless, by 2008–2009, Belgrade had adopted a more pragmatic approach, recognising that Türkiye could provide capital and technical expertise, and even play a mediating role with Bosniak communities. At the time, internal disputes among the Bosniak political elite in Serbia's Sandžak region were straining local politics, while relations between Serbia and Bosnia and Herzegovina (BiH) were tense. Türkiye initiated two trilateral cooperation mechanisms – Serbia-Bosnia-Türkiye and Croatia-Bosnia-Türkiye – which helped to ease regional frictions and improve dialogue. Parallel with these efforts, Serbia and Türkiye signed a free trade agreement, and Belgrade welcomed increased Turkish FDI, infrastructure projects and cultural engagement, notably through the Turkish Cooperation and Coordination Agency (TİKA) and organisations linked to the Gülen movement (*Hizmet*). While Türkiye's main focus in the region remained its Muslim populations (Bosniaks and Albanians), Serbia, facing diplomatic isolation over Kosovo, saw an opportunity to benefit.

Over time, however, the »zero problems« policy proved difficult to sustain. Regional upheavals (such as the »Arab Spring« and the Syrian conflict), domestic challenges (including the Gezi Park protests), and divergent interpretations of the Ottoman legacy undermined the initiative (for example, many Balkan nations frame their national identity in anti-Ottoman terms). As Alida Vračić has argued, Türkiye ultimately failed to convince Western Balkan publics of either the universality of its approach or its impartiality (Vračić 2016).

In Serbia, the forging of bilateral ties slowed as the political landscape shifted. With Tomislav Nikolić and, later, Aleksandar Vučić at the helm, Belgrade adopted a more cooperative stance on the Kosovo issue (culminating in the 2013 Brussels Agreement) and opened accession negotiations with the EU. As a result, Türkiye was relegated to a secondary position compared with Serbia's relations with Brussels and its expanding partnership with Beijing.

Domestic political dynamics in Türkiye further complicated relations. Erdoğan's statement during a 2013 visit to Prizren – »Kosovo is Türkiye and Türkiye is Kosovo« – was perceived in Belgrade as provocative (Daily Sabah 2013). In

response, President Nikolić suspended trilateral meetings between the leaders of Türkiye, Serbia and BiH (RTCG 2013). Thus, the political momentum of this phase – marked by closeness and multilateral initiatives – faded, while the Turkish economic presence in Serbia stagnated.

The »golden age« of Serbia–Türkiye relations

Effects of the 2016 coup and its aftermath

Bilateral relations between Serbia and Türkiye remained subdued for the next three years, with two major turning points: the 2015 migrant crisis and the attempted coup in Türkiye in 2016. Türkiye had already become more significant for the West in 2014, following Russia's annexation of Crimea and the outbreak of the war in the Donbas. In this context, Ankara was increasingly viewed as a key actor for maintaining wider regional stability.

The real breakthrough in relations with Serbia, however, came after the failed coup attempt in 2016. Ankara's ties with the West deteriorated sharply, as President Erdoğan grew increasingly suspicious of the EU and the United States. At the same time, he launched a broad campaign to dismantle the Gülen movement, previously known as *Hizmet* but rebranded by the Turkish authorities as »FETO« (the »Fethullah Gülen Terrorist Organisation«). This campaign extended beyond Türkiye's borders, as Erdoğan pressed foreign governments to shut down Gülen-linked institutions and to cooperate in extraditing people associated with the movement.

Several Western Balkan leaders recognised an opportunity in this shift, realising that Turkish foreign policy was entering a new, more personalised phase; what Aslı Aydıntaşbaş has termed »Erdoganism« (Aslı Aydıntaşbaş 2019). In contrast to the earlier, structural vision of Turkish foreign policy, during this stage more emphasis was placed on leaders' personal ties with Erdoğan and their readiness to accommodate Ankara's domestic political agenda abroad. In Serbia, this coincided with Aleksandar Vučić's solidification of power. After the snap parliamentary elections in 2014 and 2016 he tightened the political grip of his Serbian Progressive Party (SNS), first, by subduing the opposition and coalition partners and then by purging the SNS of opposing factions.

Serbia was among the first countries to express support for Erdoğan after the coup attempt. Moreover, Belgrade demonstrated a willingness to make concessions, even when they conflicted with its own legal framework or international obligations. In October 2016, Ankara formally requested the closure of educational and cultural institutions in Serbia linked to the Gülen movement. Two years later, in 2018, Serbia conformed. Even more controversially, in December 2017 Serbia extradited to Türkiye an official of the Kurdistan Freedom Party who had formally applied for asylum, despite an explicit request

from the UN Committee Against Torture (OHCHR) to refrain from deportation, warning of a serious risk of torture upon return (Civil Rights Defenders 2019).

In contrast, others in the region – such as Kosovo, Montenegro and North Macedonia – faced harsh criticism from Erdoğan for refusing to fully comply with similar demands concerning deportations and the closure of Gülen-linked institutions. Serbia, by comparison, was far more accommodating. Belgrade also permitted the operation of the state-sponsored Maarif Foundation (TMF), an agency tied directly to Erdoğan's presidential cabinet, whose primary mission is to replace the educational and cultural institutions formerly associated with the Gülen movement.

A constant rise in bilateral relations

President Erdoğan's 2017 visit to Serbia marked a turning point in bilateral relations, laying the foundation for what he would later describe in 2024 as the »golden age« of Serbia-Türkiye relations (Politika Online 2024). On that occasion, the two countries established the High Council for Cooperation, a political umbrella that in many respects resembles a strategic partnership. The Council has convened four times, each coinciding with presidential visits: in 2017, 2019 and 2024 during Erdoğan's visits to Belgrade, and in 2022 during President Vučić's visit to Ankara. Through this framework, both sides have demonstrated an increasing openness towards each other's interests.

Ankara, in particular, has avoided steps that might jeopardise relations. During his 2017 visit, for example, Erdoğan, accompanied by President Vučić, visited Novi Pazar, where he described the Sandžak region as »one of the most important bridges linking Serbia and Türkiye«, with Serbia serving as the connecting factor between Türkiye and the Bosniak community (Ognjen Zorić and Amela Bajrović 2017). This statement contrasted sharply with Erdoğan's controversial remarks in Prizren in 2013. In line with this more careful rhetoric, Serbia later approved the opening of two Turkish consulates, including one in Novi Pazar in 2021, an initiative previously resisted because of concerns about Ankara's influence over Bosniak political elites.

The political thaw had immediate economic consequences, most notably a surge in Turkish investment. Interestingly, the bulk of Turkish FDI has not been directed toward areas with large Bosniak or Muslim populations, but rather to regions along major transit routes, particularly the Pan-European Corridor X. A notable exception is the recent investment in the Sandžak town of Priboj (B92.net 2025). While political considerations provided the initial push, Serbia's subsidy policy for foreign investors further fuelled the expansion. According to the National Bank of Serbia, Turkish investments between 2010 and 2021 amounted to

221 million euros (€), making Türkiye Serbia's 21st most important investor, employing around 96,000 people (Ministarstvo spoljnih poslova Republike Srbije 2017). By 2024, as President Erdoğan proclaimed, Turkish investments in Serbia had reached over €400 million and trade volume had surpassed €2 billion (Radio Slobodna Evropa 2024).

Infrastructure has been another critical area of Turkish engagement. In addition to supporting road rehabilitation projects in Sandžak (such as the Tutin-Novi Pazar regional road) (RTS 2017), Türkiye has been a key partner in constructing the Belgrade-Sarajevo highway. The financing model mirrors those applied by other non-Western partners, such as Russia, China and Azerbaijan: Turkish Exim Bank provided the loan, while Turkish firms carried out the work. A Memorandum of Understanding was signed in 2018, and construction on the first section – linking Corridor X with the Serbia-BiH border near Sremska Rača – was officially launched in a ceremony attended by Erdoğan, Vučić and members of the BiH Presidency (Al Jazeera Balkans 2019). The project, implemented by the Turkish company Taşyapı, is valued at approximately €250 million and is expected to be completed in 2025 (@ekapija 2022). Progress on the BiH side, however, has lagged because of the country's complex institutional structure, in which entities and cantons have considerable autonomy. A second route, intended to connect Belgrade and Podgorica to Sarajevo via Višegrad, remains in the planning stage, with the current focus limited to the northern section.

During Erdoğan's 2024 visit, the two sides also announced plans to expand cooperation in the defence sector, with an emphasis on drone technology. However, tangible results have yet to materialise, and defence cooperation remains an area of uncertainty in bilateral relations.

Energy has emerged as another vital field of cooperation. Türkiye's geographical position as a crossroads for major pipelines has made it indispensable for Serbia's energy security. The TurkStream II/Balkan Stream pipeline, completed in early 2021, transports Russian gas through Türkiye to the Balkans and onward to Hungary, with a capacity of 16 billion cubic meters. It remains Serbia's primary source of natural gas in the absence of significant diversification projects. Türkiye also hosts TANAP (Trans-Anatolian Pipeline), which connects to TAP (Trans-Adriatic Pipeline), enabling Azerbaijani gas exports to Europe. Since the completion of the Serbia-Bulgaria interconnector in 2022, Serbia has been able to import modest volumes (currently around 400 million cubic meters annually) of Azerbaijani gas, which also transits through Turkish territory (Nin online 2024).

Remaining stumbling blocks

Despite the rapid improvement of relations since 2016, relations between Belgrade and Ankara are not without challenges. Most of these issues stem from Türkiye's

interests vis-à-vis Muslim populations in the Balkans, which are deeply intertwined with historical legacies and questions of identity. Consequently, the most significant points of tension concern the situation in Bosnia and Herzegovina (BiH) and overall relations between Serbs and Bosniaks, as well as the status of Kosovo. The latter has historically been the main source of strain in bilateral relations.

Regarding BiH, the primary challenge lies in the country's internal power dynamics, particularly the relationship between Republika Srpska (RS), led by President Milorad Dodik, and the central institutions in Sarajevo. Frequent tensions and secessionist threats from Republika Srpska, coupled with inflammatory rhetoric from Bosniak political parties, continue to poison Serb–Bosniak relations and create spillover effects for Belgrade–Sarajevo interactions. Media narratives often invoke the legacy of the 1992–1995 Bosnian War and Serbia's historical role as a point of contention.

However, Dodik has developed a cordial relationship with Erdoğan, and several Serb representatives in BiH have met with the Turkish president. This suggests that Ankara does not act exclusively as a protector of Bosniaks but is also willing to engage constructively with leaders who are politically opposed to Sarajevo (Sandžaktarević 2024). This indicates that Erdoğan may seek a mediating role, minimising any significant negative spillover into Serbia–Türkiye relations. The only notable exception came in 2024 with the UN resolution on the Srebrenica genocide, which, while contentious, did not create bilateral tensions. Moreover, Türkiye has generally played a constructive role regarding the position of the Bosniak minority in Serbia.

Kosovo, however, represents a more sensitive and potentially destabilising issue. Ankara remains one of Pristina's most vocal supporters. Türkiye has historically been a major investor in Kosovo, maintains the second-largest contingent in KFOR, supports the arming and training of the Kosovo Security Force (projected to evolve into a formal army by 2028), and actively advances Kosovo's diplomatic agenda. These actions are not welcomed in Serbia and have occasionally strained bilateral relations. Notably, Erdoğan's 2013 statement in Prizren contributed to a significant downturn in Serbia–Türkiye relations.

Tensions persist, especially given the current low point in Belgrade–Pristina relations, largely due to issues in northern Kosovo and the hardline approach of Kosovo's Prime Minister Albin Kurti. A recent flashpoint occurred in 2023 when Kosovo purchased five Bayraktar TB2 drones from Türkiye, prompting Serbia to lodge an official protest and summon the Turkish ambassador in Belgrade (Cignews.org 2023). Serbia's then Defence Minister, Miloš Vučević, publicly criticised Türkiye for training, arming and conducting military exercises with Kosovo (Radio Slobodna Evropa 2023). The dispute led to Serbia cancelling its own

planned drone procurement, though discussions continued into 2024. This episode demonstrates Kosovo's continued potential to affect Serbia–Türkiye relations.

Political frictions have also arisen. For instance, in July 2021, during a visit to Northern Cyprus, Erdoğan announced that Türkiye would lobby to increase the number of countries recognising Kosovo (Vuksanovic and Tzifakis 2021). Serbia's response was measured, however, limited to a single moderate statement from President Vučić, reflecting a more cautious approach to avoid escalation in bilateral relations.

Turkish influence on Serbia's multi-vector foreign policy

With its EU accession negotiations effectively frozen, Türkiye remains a candidate country in name only. This represents a major difference from Serbia, which continues to push, at least nominally, for progress, such as opening Cluster 3 negotiations, despite having lost its frontrunner status (Balducci 2025). However, in public and political discourse, as well as in academic circles in Türkiye, Serbia is often invoked to justify Ankara's limited alignment with EU Common Foreign and Security Policy (CFSP) declarations and measures. In other words, Türkiye presents its foreign policy as analogous to that of other EU candidate countries, suggesting it will gradually adjust as EU negotiations progress.

There are some parallels in the positioning of Serbia and Türkiye regarding the Russia–Ukraine war. Both countries have avoided joining EU or broader Western sanctions against Russia. Serbia primarily cites the Kosovo issue (Novaković 2020), while Türkiye seeks to maintain its role as a communication channel with Moscow (Çagaptay 2023). Both maintain active lines of communication with Russia and have accepted large numbers of Russian expats displaced by the war. In this sense, both are perceived – as a self-perception in Serbia and in reality in Türkiye – as »neutral grounds« for facilitating contacts between Russia and the West. While there is a degree of parallelism, the approaches do not fully overlap.

Türkiye's negative impact on Serbia's EU path is limited. On the contrary, Türkiye is a key hub for Serbia's energy diversification, aligning with EU objectives of energy security and reducing dependence on Russian supplies. Moreover, Türkiye could serve as an important broker for improving relations between Belgrade and Sarajevo, potentially contributing constructively to the internal situation in BiH. Potential friction in EU accession could arise in the areas of rule of law and human rights; for example, Serbian compliance with Turkish requests to deport citizens against international law, or bending domestic procurement rules contrary to EU standards, could become concerns. However, no such issues have arisen to date. Serbia has also implemented EU restrictive

measures against persons and entities in Türkiye deemed responsible for unauthorised natural gas drilling in the Eastern Mediterranean (territory recognised by the EU as a part of Cyprus) (EU HR 2025). This stance was not perceived negatively in Türkiye and did not harm bilateral relations.

Regarding Serbia's cooperation with NATO and Türkiye's role, Ankara is supportive of further enlargement to the Western Balkans and cooperation within the Partnership for Peace (PfP). However, the Kosovo issue remains the primary point of sensitivity. Serbian authorities view Turkish engagement in Kosovo – particularly as a major supporter of KFOR and Kosovo's de facto army – as negative, though it is unlikely to affect Serbia's broader relations with NATO. Despite this, Serbia continues to regard NATO as an important security partner, conducting its main military cooperation within the Partnership for Peace framework. While Serbia has not conducted military exercises with Türkiye, there are indications of potential cooperation in the defence sector. In 2019, Ankara and Belgrade signed an agreement on military-industrial cooperation, allowing Türkiye to transfer technology and know-how to Serbia, potentially enabling the latter to access European defence markets (Vuksanovic 2024). In 2023, the two countries launched a NATO-supported project, developed by Türkiye's Bolu Abant İzzet Baysal University and Serbia's University of Niš, to establish an early-warning system for NATO countries (Emir Isci 2023). Serbia's industrial-military capacity makes it a valuable partner.

It is noteworthy that the ongoing crises in Ukraine and the Middle East have not had negative repercussions in bilateral relations. In fact, the two countries appear to share a mutual understanding and appreciation for pragmatic, flexible foreign policies. While Serbia and Türkiye take similar positions regarding Ukraine – maintaining communications and some economic cooperation with Russia, while also supplying Ukraine with arms – they differ in their positions on the Middle East. Türkiye has been critical of Israeli actions in Gaza and the West Bank, whereas Serbia, while recognising Palestine, has deepened ties with Israel, including arms supplies – recently paused following international criticism (Dragojlo and Sarf 2025). Türkiye has not reacted negatively, and bilateral relations remain unaffected.

Similarly, Serbia's relations with Russia and China are not hindered by Türkiye. Türkiye maintains a relatively high level of engagement with Russia, including an uninterrupted flow of natural gas through the TurkStream I and II (Balkan Stream), while also serving as a key transit route for Azerbaijani gas to Europe, including Serbia. Regarding China, both Serbia and Türkiye maintain important bilateral relationships with Beijing, with no visible conflicts. Türkiye has adopted financing models for Serbian infrastructure similar to those previously applied by China and Azerbaijan, exemplified by the Serbia-BiH

highway project. Likewise, in defence cooperation, Serbia and Türkiye have attempted, with partial success, to replicate the levels of engagement Serbia maintains with China, France and Russia.

Conclusions

Since 2009, Serbia's relationship with Türkiye has been evolving steadily, marked by occasional hiccups related primarily to the Kosovo issue. The development of bilateral ties can be divided into three main phases: (i) from the breakup of Yugoslavia until 2009; (ii) from 2009 to 2013, driven by Ankara's new systemic and strategic approach; and (iii) beginning in 2016 and continuing to the present, shaped by Türkiye's personalised foreign policy.

A defining feature of the relationship is its largely bilateral and pragmatic nature, with limited attempts to embed it within broader multilateral frameworks, such as NATO or the EU. The few multilateral elements concern mainly Türkiye's role as a mediator or power broker between Serbia and BiH, and, to a lesser extent, between Serbs and Albanians. Türkiye does not aim to position itself as an alternative centre of influence in the Western Balkans – except partially during the 2009–2013 »zero problems with neighbours« period – nor does it fully complement EU efforts in the region. The only areas of alignment with EU priorities are peacebuilding initiatives and regional energy diversification, but these appear to be more coincidental or based on Türkiye's self-interest than a deliberate effort to advance EU objectives.

Potential challenges to Serbia-Türkiye relations could arise from business or political deals that contravene EU public procurement rules or international law and human rights standards. However, to date these have not emerged as obstacles. Conversely, Belgrade has demonstrated that, despite close ties with Ankara, it is willing to implement EU restrictive measures against Türkiye when necessary.

The primary multilateral arena in which Türkiye seeks to project influence remains NATO. Here, the main potential friction point is Ankara's political and military support for Kosovo, which could generate tensions in Serbia-Türkiye relations, as has occurred in the past. Any spillover to Serbia-NATO relations, given NATO's role in KFOR, appears limited, based on historical experience. In fact, NATO could even serve as a platform for future bilateral cooperation, exemplified by the joint NATO-supported research project between universities in Serbia and Türkiye.

Outside Kosovo and, to a lesser extent, Serbia-BiH relations, the two countries have respected each other's autonomy in engaging with third-party international partners. Their foreign policies exhibit a degree of parallelism, without producing significant friction. For instance, Serbia maintains strong relations with Israel, even as Ankara has been critical of Israeli military operations in

Gaza. Similarly, both countries independently manage their relationships with Russia and China, with no overlap or conflict.

At its core, the Serbia–Türkiye relationship remains pragmatic and heavily shaped by personal ties between the leaderships. This framework has facilitated enhanced cooperation across multiple spheres in recent years.

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Türkiye's Strategic Influence in Southeast Europe

Türkiye's role as a regional actor in Southeast Europe (SEE) has traditionally been viewed through the lens of its bid for EU integration. However, over the past three decades, the region's own focus on European integration has often overshadowed Türkiye's broader influence in regional affairs. Despite this, Ankara remains a significant presence in SEE – not only as a historical regional power but also as an increasingly important player in economic, political, and security domains. In the last years, Türkiye has pursued a more assertive foreign policy, leveraging its growing geopolitical weight across the Western Balkans, the Black Sea, and the Middle East. More recently, Russia's war of aggression against Ukraine and the Trump administration's departure from long-standing norms in U.S.–Europe relations have triggered significant changes in the European security landscape, giving Türkiye new venues to exert its regional assertiveness.

This volume features three country perspectives – Bulgaria, Romania, and Serbia – and examines the extent to which Türkiye's internal transformation and evolving foreign policy have positioned Ankara as a key actor capable of shaping the strategic orientation of Southeast Europe. It also explores whether this changing dynamic calls for a recalibration of foreign policy across SEE, as regional capitals begin to rediscover Ankara's strategic role. Further publications of the Friedrich-Ebert-Stiftung can be found here:

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