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Turkey: Current and Future Political, Economic and Security Trends

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June, 2012



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Prepared for the Canadian Defence & Foreign Affairs Institute
1600, 530 – 8th Avenue S.W., Calgary, AB T2P 3S8
www.cdfai.org

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ISBN: 978-0-9737870-6-1

► Executive Summary

Turkey is the third most populous nation in Europe with 71.9 million residents. The country is a secular democracy and one of the fastest growing economies in the world. The Justice and Development Party (AKP), a centre-right party, has held control since 2002 and now enjoys a 50 per cent share of the seats in the National Assembly. Turkey has very consistently maintained a pro-Western foreign policy since the end of World War II, and has provided crucial support to United States (US) foreign policy objectives. The AKP also has aspirations for Turkey to become a regional power in the Middle East and acts according to its geopolitical interests in this volatile region. Occasionally, pursuing these ambitions results in disagreements with neighboring countries such as Syria, Israel, Iraq, and Iran. However, with the exception of Syria, the existing active commercial ties between these countries have largely remained unharmed. Turkey is now the world's 17th largest economy, a G-20 member, and offers access to markets in Europe, the Caucasus, Central Asia, and the Middle East. Turkey is a significant hub for the transportation of oil and gas as it acts as a bridge between Europe and some of the largest energy suppliers in the world. Thus, in addition to having good relations with western and eastern countries, the Republic of Turkey is an economically successful, stable, peaceful, democratic, and secular country in a region rife with conflict.





INTRODUCTION

The Republic of Turkey was established on parts of the territories of the Ottoman Empire in 1923 after a bitter War of Independence against the forces that occupied it after World War I. Under the leadership of its first President, Mustafa Kemal Atatürk, Turkey underwent numerous reforms aimed at the Westernization and modernization of the country. The distinctive political legacy of Atatürk continued until the end of the twentieth century. Since then, significant political and economic changes have occurred in Turkey over the past ten years.

Turkey, the third most populous nation in Europe with 71.9 million residents, is a secular democracy and one of the fastest growing economies in the world. The Republic of Turkey is a stable, peaceful, and democratic country in a region rife with conflict. The country maintains good relations with both western and eastern countries.

This paper addresses current and future political, economic, and security trends in Turkey. At the time of this writing, the period of fall 2011 is significant because of the recent elections in Turkey and the country's evolving relationship with foreign countries. This paper provides the reader with insight into current events in Turkey in the context in which they have occurred, and a sense of where the country may be headed in the long term.

POLITICAL SCENE

Domestic Politics

Turkey is a secular democracy. The government has a unicameral national assembly that elects a member of its ranks to the role of president for a five year term. The president appoints the prime minister, who is the head of the government.

The most important recent development in Turkish domestic politics is the rise of the Justice and Development Party ("AK Party" or "AKP"), a centre-right party. In Turkey, political parties must achieve at least 10% of the vote to gain representation in parliament. The AKP first came to power in 2002 under the leadership of Recep Tayyip Erdoğan, winning 34% of the vote and 363 of 550 parliamentary seats. The Republican People's Party (CHP) won 19% of the vote and 178 seats. All the parties that held seats prior to the 2002 election were no longer represented in parliament. This dramatic shift was due in part to the financial crisis of 2001 and the collapse of the centre-right coalition parties. AKP party leader Erdoğan was appointed Prime Minister of Turkey in 2003, and has retained his position to this day.

In July 2007, the AKP surpassed its previous performance at the ballot box by winning 47% of the vote and 341 seats. The CHP won 21% of the vote and 112 seats. The Nationalist Action Party (MHP) gained access to parliament, earning 14 % of the vote and 70 seats (Foreign & Commonwealth Office 2011a). After the 2007 election, Abdullah Gül, one of the founders of the AKP, was elected to his current position of President of Turkey.

The most recent parliamentary election took place in June 2011, with a turnout of 83% of registered voters. The AKP won 50% of the vote and 327 seats (CEPPS Election Guide 2011). The results confirmed the strength of the AKP and were in line with the results of the constitutional referendum held in September 2010. The main opposition party, the CHP, minimally improved its status after the election, winning 26% of the votes under the leadership



of Kemal Kilicdaroglu. Despite sex scandals surrounding high level party officials, the MHP garnered 13 % of the votes. The Peace and Democracy Party (BDP) candidates ran as independents and earned 36 seats in parliament. However, six of these seats are occupied by people currently serving prison sentences due to their involvement with the Kurdistan Workers Party (PKK), which is the Kurdish Separatist movement.

Parliamentary Election Results <i>(% of votes and # of seats out of 550)</i>			
Party	2002	2007	2011
AKP	34%	47%	50%
	363	341	327
CHP	19%	21%	26%
	178	112	135
MHP	-	14%	13%
	-	70	53

Both Prime Minister Erdoğan and President Gül have a past in Turkey's Welfare Party, which was banned in 1998, "on the ground that its Islamic program threatened the secular basis of the Turkish Republic" (Kinzer 1998). Soner Cagaptay argues that the AKP changed its fundamental message because it learned from the experience of previous political parties, essentially recognizing that it could not maintain power on an anti-secular platform (Cagaptay 2007, 20). Thus, the AKP's Party Programme makes explicit reference to the party's secularism:

"Our party considers religion as one of the most important institutions of humanity, and secularism as a pre-requisite of democracy, and an assurance of the freedom of religion and conscience. It also rejects the interpretation and distortion of secularism as enmity against religion. Our Party refuses to take advantage of sacred religious values and ethnicity and to use them for political purposes. It considers the attitudes and practices which disturb pious people, and which discriminate them due to their religious lives and preferences, as anti-democratic and in contradiction to human rights and freedoms. On the other hand, it is also unacceptable to make use of religion for political, economic and other interests, or to put pressure on people who think and live differently by using religion." (Ak Parti Official Web Site 2011).

A 2006 study found that Turkish society is divided: "On the one side, we have urban dwellers of better socio-economic status and education, who do not feel bound by the Sunni religious belief system. On the other side, we have religiously devout people of lower education and socio-economic status, who feel closer to the Islamists than the secularists" (Çarkoğlu and Toprak 2007, 14). However, this division is becoming murkier as the political strength of the AKP increases and attracts a wide swath of voters, including both the rich secular elite as well as the poor and non-urban.

The Turkish army has intervened in politics in the past (in 1960, 1971, 1980 and 1997) and originally hinted that it would do so again if there were any threats to a secular democracy from the AKP. However, while past military acts generally occurred when there was popular support (Cagaptay 2007, 10), recent elections have made it clear that the AKP has the support of the Turkish public. The army traditionally enjoyed immunity from civilian law, until 2007, when the government began accusing military officials of plotting a coup in a court case referred to as Ergenekon. On July 29, 2011, many military officials including the top general and leaders of the navy, army and air force, resigned to protest the arrests of other generals as suspects in these conspiracy investigations. Prime Minister Erdoğan then appointed the next senior military commander, which signified civilian authority over the military. "This is effectively the end of



the military's role in Turkish democracy," said Asli Aydintasbas, a columnist for the Turkish daily newspaper Milliyet. "This is the symbolic moment where the first Turkish republic ends and the second republic begins" (Tuysuz 2011).

"Once in power, the AKP garnered popular support for change, succeeding in part because of the decade of stable economic growth the party has provided. A buoyant AKP established itself as Turkey's new elite, gradually replacing Kemalist power centers in the media, business, academia, civil society, unions and, after amendments to the constitution last year (2010 referendum), the high courts" (Cagaptay 2011a).

The AKP has established a record of modernization, economic growth, and reforms to meet the accession requirements of the European Union (Gardner 2007). Indeed, the AKP has advocated for Turkey's accession to the European Union (EU), bringing with it a far-reaching process of reforms, many of which are aimed at strengthening the country's democracy. The next parliamentary elections will take place in 2015, and the AKP will continue to be the dominant party in Turkish politics for the foreseeable future.

Regional Political Situation

Turkey's regional politics are closely linked to the country's domestic policy. Turkey, under Erdoğan's rule, does not see itself as a strictly Western country any longer. Its identity is becoming more of a bridge between east and west. With ease, Turkish people act as westerners when they are in the West and easterners when they are dealing with eastern countries. Turkey's request for EU membership has stalled and Turkey's national pride and feelings were hurt by the prejudiced attitude of certain EU countries towards Turkey's membership bid. As a result, Turkey is now putting its efforts into becoming a regional power in the Middle East.

The Foreign Policy statement of the AKP makes it clear that without turning away from the West, Turkey intends to increase its regional role and relationships with Islamic countries (Ak Parti Official Web Site 2011). The fact that Turkey is willing to exert greater influence in the region is an extremely important development.

In particular, Turkey's relationships with countries that are polarized, are unique and valuable. Turkey has experienced the harmful effects of conflict on its borders more than once and as a country in a region inundated with conflict, Turkey is mindful of the impact these can have on its internal security. The Foreign Policy statement makes clear that Turkey "shall take more initiative in the spots of crisis in regions neighboring Turkey and try to make a more concrete contribution to the solution of these crises." Turkey also recognizes the impact that regional security has on economic development (Ak Parti Official Web Site 2011). The relationship between security and development is particularly salient in Turkey since the country has increased its economic cooperation with its neighbors, especially with regard to energy routes.

When the AKP took over, it pledged a "zero problems" initiative aimed at better relationships with its neighbors, especially Arab countries. This policy resulted in access to new markets and strategic partnerships. Turkey became interested in a variety of alliances outside the western world – political, economic and cultural – with countries like China and Russia, as well as with Arab and African countries. These new alliances and economic ties have contributed to the current economic boom in Turkey. However, Turkey's growing relationship with Arab countries has also led to distancing itself from Israel, a very close ally of the Turks for the past 50 years.



The “zero problems” initiative faced its biggest challenge to date during the events of the Arab Spring of 2011. As the leader of a democratic and moderate Muslim country, Prime Minister Erdoğan has attempted to mediate and play an important role in the political changes in the region. The “zero problems” policy has faded away as a result of this increased political activity, in particular, due to Turkish criticism of countries such as Libya and Syria that are not interested in advancing democracy.

Syria has been the main benefactor of Turkey’s “zero problems” policy. Turkey removed trade barriers and visa requirements for travel, created bilateral trade agreements, and cooperated in military exercises with Syria. However when Syrian President Bashar al-Assad used excessive force to bring down the insurgency in 2011, an estimated 7,000 Syrians fled to refugee camps in Turkey. Erdoğan became a very vocal critic of al-Assad, which put an end to his win-win strategy with an Arab country. “Turkey is amassing troops on the Syrian border, trying to organise Syria’s internal opposition and calling overtly for the overthrow of the regime. This stance is unprecedented in the history of the modern Turkish state” (Oliver Roy 2011).

The relationship between Turkey and Libya also underwent a similar change. In a relatively brief amount of time, Turkey moved from being a great ally of Libya, with multi-million dollar business transactions with Libya’s Moammar Gadhafi, to criticizing the leader profusely and joining in the alliance against him as a member of NATO. The relationship between Turkey and the new Libyan administration is expected to be positive.

In 2011, Turkey called for Egypt’s Hosni Mubarak to step down. Turkey expects the development of good relations with the new Egyptian administration even though no close ties currently exist between the two countries. Erdoğan visited Egypt in September 2011, and was welcomed as a hero, which cemented his status as a regional leader. Erdoğan spoke of Turkey as a model country for the Arab world, where secularism and Islam are balanced. He also strongly spoke in favor of a separate Palestinian state (Michael 2011).

Since the inception of Israel, Turkey has ranked as Israel’s closest ally in the Muslim world. However, the new positioning of forces in the Middle East is causing a deep alienation between the two countries. The deterioration of the relationship can be attributed to Turkish support of the Palestinians, which began during Israeli military operations in Gaza in 2008 and 2009. A major rift occurred in 2010 when Israel conducted a commando raid on a Turkish protest flotilla bound for Gaza in which nine Turks died. In September 2011, Turkey downgraded its diplomatic and military ties with Israel and expelled top Israeli diplomats because of Israel’s refusal to apologize for the raid (Arsu 2011a). Mr. Davutoglu, the Turkish Foreign Minister stated that, “Our aim here is not to hurt our friendship but return this friendship to its right track.” Meanwhile, the billion dollar trade relationship between the two countries continues to flourish.

Turkey has been supportive of Iran in the past few years, and has played an active role in mediating the conflict between Iran and Western countries over Iran’s nuclear program. Even though Turkey hosted a diplomatic conference in January 2011 for this purpose, it did not achieve many of its goals. As well, disagreements over Iraqi politics and the conflict in Syria have strained the relationship between Turkey and Iran. In September 2011, the friction between Iran and Turkey was elevated by Turkey’s announcement that it would install a radar system designed by the United States as part of the NATO shield against a missile attack in Europe (Gladstone 2011).



Soner Cagaptay argues that “in the years to come, the over-arching rivalry in the Middle East will be neither the Arab-Israeli conflict nor Saudi-Iranian tensions. It will be a revived Turkish-Iranian competition” (Cagaptay 2011b). He explains that historically, Turkey and Iran have competed for control in the region. This conflict was put on hold during the middle of the 20th century when Turkey turned its attentions to the West and withdrew from regional politics. However, it is anticipated that the two countries will again compete for dominance in the region as a result of Turkey’s increasing presence in Middle Eastern politics under the AKP. Turkey’s acceptance of the NATO missile defense shield “signaled to Tehran that a Middle Eastern Turkey, anchored in NATO, is perhaps a greater threat to Iranian interests than a merely pro-Western Turkey” (Cagaptay 2011b).

Iran, Russia and Iraq are all major energy suppliers to Turkey. Russia had no objections to Turkey’s installation of the radar due to American assurances that Russia is not seen as a threat to NATO.

However, Russia also supports Armenia, while Turkey and Armenia do not have formal diplomatic relations. In 2009, Turkey and Armenia signed an accord stating their intent to establish diplomatic ties and reopen their shared border, which would benefit land-locked Armenia. However, the accord was met with protests in Armenia, where many people believe that Turkey has not fully addressed the 1915 killing of hundreds of thousands of Armenians. Another reason for the impasse is Turkey’s support of its ally Azerbaijan in the ongoing Azerbaijan-Armenia dispute over the Nagorno Karabagh region. Thus, plans to establish relations between the two countries have failed because of these two issues.

Iraq and Turkey have established many trade ties and agreements, especially within the Kurdish free zone. Turkey has sent troops across the northern border of Iraq in 2008 and 2011 to conduct counterattacks on Kurdish terrorist groups. Iraq’s foreign minister indicated in October 2011 that the Iraqi army may help with Turkish efforts to destroy PKK bases in northern Iraq. However, the Iraqi government has also expressed concern over unilateral Turkish military interventions into Iraq (Arsu 2011b).

The relationship between Greece and Turkey has been marked by alternating periods of mutual hostility and reconciliation ever since the 1923 establishment of the Turkish republic. The countries are currently experiencing a period of détente.

While Turkey officially recognizes the northern portion of Cyprus as a separate Turkish-Cypriot state, the EU and other countries only recognize the Greek Cypriot government. The Greek Cypriot government and Israel began drilling for gas off the coast between southeastern Cyprus and Israel in September 2011. This has angered Turkey, which believes that the mineral rights belong to both communities. In addition, Turkey has expressed that it will use its navy to deal with the dispute if needed.

FOREIGN POLITICAL RELATIONS

Turkey and the EU

The prospect of Turkish accession to the EU initially held great promise for both Turkey and the EU. Accession negotiations were opened in October 2005. They lost momentum in just over a year's time over Turkey's unwillingness to open its ports to Cyprus. As The Economist noted in



an article in December 2006, “The requirement at the heart of its current dispute with the EU – the opening of its ports to implement a customs union - certainly sounds procedural. But to the Turks it implies recognizing the Greek-Cypriot government as the only legitimate one on the disputed island. That is clearly a political not a technical decision” (2006). The Cyprus issue is ongoing and the Turkey 2011 Progress Report published by the European Commission notes that “there is no progress towards normalization of bilateral relations with the Republic of Cyprus” (European Commission 2010a). The Commission concluded that while Turkey has made progress in meeting EU membership criteria, particularly through constitutional reforms, additional changes are needed in the areas of fundamental rights, especially in the freedom of expression. The Commission also noted that accession negotiations were moving along slowly, and that the process had lost its momentum (European Commission 2010b).

In addition, the internal politics of EU countries will certainly have a big impact on Turkey's EU discussions. The EU has traditionally accepted countries much poorer than Turkey. However, Turkey is large and more importantly, the only Muslim country on European territory. Even if there is continued opposition to Turkish membership in the EU, talks will continue and the EU itself will also undergo many changes during this period. However, accession no longer appears to be a top priority for the Turks and there is no guarantee that the EU will ultimately grant Turkey membership. Regardless of the ultimate outcome, Turkey will continue to benefit from the reforms that the country has already undertaken and will continue to undertake as a part of the EU membership process.

Turkey and Canada

Turkey and Canada have well established bilateral relations. The two countries have developed political, commercial, strategic, and security partnerships. Both countries are also participants in NATO, the United Nations, the Organization for Security and Cooperation in Europe (OSCE), the Organization for Economic Co-operation and Development (OECD), and the Council of Europe. The Canadian and Turkish militaries have cooperated in NATO operations, most recently as major contributors to the International Security Assistance Force (ISAF) in Afghanistan.

In a recent editorial in *The National Post*, Hugh Segal argues,

“Turkey's success is good for the idea of a modern, secular Islamic democracy and the role model it offers; good for regional security; good for maintaining the balance between Sunni and Shia in the region; and good for countering Iranian aggressive aspirations. Canada should do whatever it can to encourage Turkish success and international engagement. And that applies even when they disagree with our friends. Israel and Turkey are both allies of Canada and they will have to sort out their differences between them. We should offer our good offices to assist our allies any way we can. They are the only stable and pluralist democracies among the hundreds of millions people in that part of the world. Helping to mend the fences between Israel and Turkey should be a priority for the Canadian government” (2011).

Turkey and Canada have a solid commercial relationship and Export Development Canada has acknowledged Turkey as a strategic market of opportunity. In 2008, exports to Turkey ranging from commodities to technology goods reached \$1.2 billion, making Turkey Canada's 22nd largest merchandise export market. Turkey has recently become one of the top global destinations for Foreign Direct Investment (FDI) and Canadian companies have begun to realize the investment potential that Turkey offers. Canadian investments in Turkey reached \$1.1 billion



in 2009. Opportunities exist for Canadian investors, particularly in the sectors of energy, information and communication technologies, mining, environment, and agriculture (Government of Canada 2009).

Turkey and the United States

Turkey has maintained a pro-Western foreign policy very consistently since the end of World War II and has provided crucial support to United States foreign policy objectives, including as a NATO member during the Cold War and the Gulf War (Çelik 1999). Relations with the US were somewhat strained during the Iraq war, but Turkey has increased its trade with Iraq in recent years. In line with US politics, Turkey recently agreed to install the NATO missile-detection radar, and has also taken a position against al-Assad of Syria. On the other hand, Turkey's support of a Palestinian state has strained its relationship with the United States. In the past, Turkey and the United States have dealt with such disputes through diplomatic discussions that have allowed the two countries to resolve serious problems. One can be optimistic that a consistent policy dialogue will prevail in the future as well. It is predicted that Turkey will maintain its strong relationship with the United States and NATO, while continuing to take sides in the region and keeping a high profile in the Arab and Muslim world.

Mustafa Aydın, speaking at a panel on “Regional Challenges to Post-Election Turkey” at The Brookings Institution in October 2007, outlined some of the ways in which the Turkey-US relationship has changed. He highlighted that the relationship has become more multilateral and multifaceted, as Turkey has expanded its regional focus and has also expanded its relationship with the US to include much more than security (The Brookings Institution, 6). George Friedman comments that even though Turkey is increasingly pursuing its own objectives in order to emerge as a regional power, the country is “prepared to cooperate with the United States on issues of mutual interest, but not as a subordinate power” (Friedman 2007)

Irrespective of whether the issues concern continuing involvement in Iraq, hostility with Iran, or efforts at creating peace in the Middle East, it is quite clear that the United States will want to keep its relationship with Turkey as strong as possible. For its part, Turkey will continue to be an ally of the United States as long as US policies do not have a direct negative impact on Turkish security. Nevertheless, how the relationship between the two countries will evolve in the future also seems to depend in no small part on how the United States handles a Turkey that is actively extending its influence in the region.

CURRENT ECONOMIC SITUATION

State of the Economy

Capitalizing on its location that spans the Middle East and Europe, Turkey has become a key point of transit for oil and gas and offers superb access to markets in Europe, the Caucasus, Central Asia, and the Middle East. Turkey has experienced substantial sustained growth since turning its economy around in 2001. Today, Turkey is the world's 17th largest economy, and a member of the Group of Twenty Finance Ministers and Central Bank Governors (G-20).

Turkey's GDP (in million euro) rose from 219,816 in 2001 to 441,600 in 2009; its GDP growth rate was -5.7% in 2001, strong from 2002-2007, -4.7% in 2009, and an estimated 8.2% in 2010. Inflation, a severe problem for Turkey in the past, has been brought under control, although the risk of inflation still remains. Current estimates for 2011 inflation rates are around 8.5%, and the government has made taming inflation a priority. The median age for the population of



Turkey is 28 years and unemployment remains relatively high, at 14% for the overall population, and 25% for workers under the age of 25 in 2009. Turkey's current account deficit is also high, at -10,067 million euros in 2009 (European Commission 2010a, Statistical Annex). In 2010, foreign direct investment was \$9.1 billion (USD), of which \$195 million was in the mining and quarrying sector (Republic of Turkey Investment Support Agency).

The Turkish economy grew by 11% in the first quarter of 2011, passing China (9.6%) and Argentina (9.9%) to become the fastest growing economy in the world during this period. This figure was higher than market expectations and particularly remarkable when compared to the economic situation of other countries in Europe and the Middle East (Champion 2011). The majority of economic growth in Turkey stems from the retail, financial and construction sectors. However, the Turkish economy does show signs of stress and “overheating”. Economists are most concerned with the current account deficit, which is above 8% of GDP and rising, as well as over the doubling of the trade deficit that occurred in one year. Imports to Turkey expanded almost four times more than exports from Turkey in May 2011.

Concerns have also arisen over the assessment that the consumer driven economy will not be stable in the long term. The Turkish economy underwent two major economic busts in 1994 and 2001, and there is a growing fear that the current growth in consumer loans and trouble in financing gaps will lead to another crash (Champion 2011). Atilla Yesilda, an economist, writes, “We are again producing and consuming beyond our capacity. We are financing our growth entirely through foreign credit, which is becoming more expensive. At some point life catches up with you, and you crash” (Thomas 2011).

However, many business and government leaders believe that Turkey is no longer in a period of boom and bust, as the government and banks are under control, and will be capable of a “so-called soft landing.” The 2001 financial crisis in Turkey involved many poorly capitalized banks failing. However, since that time, the government has enacted a number of capital and lending rules. These rules were successful in preventing the 2009 recession from becoming a full-blown crisis in Turkey. The government has also imposed restrictions on credit card lending; however, general purpose consumer loans are increasingly being used in place of credit cards. As well, the Central Bank of Turkey has raised the amount of interest-free deposits that banks must hold at the central bank, in an attempt to decrease the amount that banks have available to lend to eager consumers (Thomas 2011). The AKP is confident that Turkey will recover from these economic hurdles. The GDP per capita has almost tripled from \$3,037 in 2001 to \$10,106 (USD) in 2011 (World Bank 2011a), and the party is hopeful that this positive trend will continue.

Corruption has been a problem in previous Turkish governments. However, the AKP made anti-corruption one of its election platforms and came to power with high expectations. Transparency International's Corruption Perceptions Index 2010 (CPI) ranks Turkey 56th best out of 178 countries ranked, with a score of 4.4 on a scale of 0-10. Transparency International notes that the score “relates to perceptions of the degree of corruption as seen by business people and country analysts, and ranges between 10 (highly clean) and 0 (highly corrupt)” (Transparency International 2010). Turkey shares the 56th spot with Malaysia and Namibia, and is followed by Latvia and Slovakia, both members of the European Union. It is important to recognize that corruption encompasses the giving and receiving of bribes. The Transparency International 2008 Bribe Payers Index highlights that many countries with large export sectors, including many of the countries that do business in Turkey (such as Russia and Italy),



substantially need to improve their anti-corruption measures (Transparency International 2008).

Infrastructure

Turkey has well-developed infrastructure throughout much of the country that is capable of supporting significant development. Turkey has made many reforms to its infrastructure sector to meet the requirements of the EU and continues to invest in its infrastructure.

Most traffic in Turkey is currently on the road networks. The United Nations Economic Commission for Europe (UNECE) found that “about 83 percent of freight and 90 percent of passenger traffic are carried by roads” (UNECE 2009). Road maintenance is often underfunded and road safety is a serious problem (The World Bank 2011b). The government is working to construct new roads using an increased public investment budget (US Department of State 2011), but continues to be challenged to meet the highway demands of a growing population. At the same time, while the government is investing heavily in infrastructure projects, the privatization that has been carried out in many sectors in Turkey is also underway in the transport sector with respect to motorways, bridges, Turkish Airlines, ports, and other transport infrastructure (Republic of Turkey Prime Ministry Privatization Administration 2011).

The Turkey 2007 Progress Report notes that progress has been made in air, maritime, and road transport, but not in rail transport (European Commission 2007, 48-49). The 2010 Progress Report confirms that “rail transport is the only transport sub-sector where no progress has so far taken place” (European Commission 2010a, 62). While significant investments have been made in developing highways, preparedness in the rail sector is still at a very early stage. It is widely agreed that the rail sector, which is controlled by the Turkish State Railways (TCDD), is in need of reform. Certain major new rail projects include high speed passenger trains, most importantly one that connects Istanbul and Ankara, and the Marmaray project, which will provide a rail connection for mass transit underneath the Bosphorus Strait.

In relation to power supplies for the country, there was concern that Turkey could experience shortfalls in electricity supply because of a predicted increase in electricity demands. While the US Department of State noted that data indicated electricity shortages in 2009, these projections were later amended. In fact, the growth in electricity demand decreased in 2009, and Turkey went on to pass laws encouraging investment in the sector, particularly for facilities that were brought online by 2012 (US Department of State 2011). The European Commission 2010 Turkey Progress Report explains that even though “in 2009 and 2010 some – albeit modest – progress can be reported on infrastructure, in particular roads and oil pipelines, there is a risk that inadequate infrastructure, including for power supply, could hamper the economic recovery. Gross electricity consumption growth has averaged some 7% in each of the last few years, and extra power-generating capacity is being constructed, albeit with some delays” (European Commission 2010a, 43). The same report goes on to state that, “good progress can be reported on electricity. With new private sector investments undertaken, Turkey’s installed capacity increased by 2,800 MW and private investments in the energy sector amounted to €3.1 billion in 2009. Implementation of the new balancing and settlement regulation started, thereby launching modern electricity market trading practices” (European Commission 2010a, 64). Turkey is also currently privatizing its electricity distribution system.

An ongoing challenge to Turkey's infrastructure development is its vulnerability to earthquakes. Turkey is a tectonically active region that experiences frequent destructive earthquakes. In



1998, the Izmit earthquake killed over 17,000 people and injured almost 50,000, while leaving half a million people homeless. An estimated 3 to 6.5 billion USD of damage were incurred in Istanbul, Kocaeli, and Sakarya Provinces (USGS 2005). In 2006, a team investigating this issue predicted that within thirty years, Istanbul would likely experience an earthquake of 6.8 to 7.5 magnitude (US Department of State 2006). In October 2011, a magnitude 7.2 earthquake in the southeastern region of the country near Van killed hundreds as buildings collapsed (Arsu 2011c). While Turkey has building codes in place – most recently the Turkish Earthquake Code of 2007 – a majority of structures in Turkey have not been built to withstand strong earthquakes.

Another area of concern is that “Turkey faces a backlog of environmental problems, requiring enormous outlays for infrastructure. The most pressing needs are for water treatment plants, wastewater treatment facilities, solid waste management, and conservation of biodiversity” (US Department of State 2007).

Energy Transit

Turkey's significance as a hub for the transportation of oil and gas can be attributed to the mutually reinforcing factors of location and design. Turkey bridges Europe and some of the largest energy suppliers in the world. Turkey's Bosphorus Strait, connecting the Black Sea and the Mediterranean Sea, is a key location through which exports travel and is one reason for Turkey's importance as a hub of energy transit. Another reason is that oil and gas from the Caspian Sea now travels by pipeline through Turkey via two completed pipelines: the Baku-Tbilisi-Ceyhan (BTC) pipeline (oil) and the Baku-Tbilisi-Erzurum (BTE) pipeline (gas). Terminating at Ceyhan on Turkey's Mediterranean coast, oil from the Caspian Sea can make its way to world markets. In the case of onward transit, Turkey and Greece have opened the Turkish-Greek pipeline that transports gas from the BTE from Turkey to Greece, from which it is piped onwards to Italy (Özerkan 2007). Turkey is also an important outlet for Iraqi oil from Kirkuk via the Kirkuk-Ceyhan pipeline.

An area of serious concern is the environmental danger posed by large amounts of oil tanker traffic through the Bosphorus. In an effort to alleviate some of the traffic and thus the danger, Turkey has begun construction of the Samsun-Ceyhan pipeline that offers an alternative to travel through the Bosphorus. It is scheduled to go into operation in 2012. The proposed Nabucco pipeline between Turkey and Austria could be operational in 2017 and is estimated to carry 31 billion cubic meters of natural gas from Iraq, Azerbaijan, Turkmenistan, and possibly Egypt (Nabucco 2011). Other major pipelines that connect Turkey to supplies and also enable it to become a transit point for supplies, have already been planned or completed.

What does being a hub of energy transit mean for Turkey? Writing with specific reference to the BTC, Zeyno Baran describes the geopolitical importance of the pipeline for Turkish interests. He notes that among other things, the pipeline would give Turkey regional leverage and strategic importance internationally (Baran 2005, 104). For the EU and the United States, Turkey can now provide another avenue of obtaining oil and gas that is independent of Russia and Iran (Kuser 2006).

Writing in *Today's Zaman*, Hasan Kanbolat states that “the basis of Turkey's energy strategy involves using its own geography and geostrategic advantage to become an energy corridor between the energy-rich countries and primary energy users” (Kanbolat 2007). Clearly, Turkey is succeeding at this goal.



Domestic Oil and Gas Situation

Turkey has proven oil reserves of 270 million barrels (as of 2011) and proven natural gas reserves of 6.173 billion cubic meters (2011 estimate). Oil consumption is 646,300 barrels per day (2010 estimate) and natural gas consumption is 38.12 billion cubic meters (2010 estimate) (Central Intelligence Agency 2011). Turkey meets its domestic demand through imports as the country's known oil and gas resources are insufficient to meet its needs.

In the report "EU Energy Policy and Turkey," the European Commission notes that "currently, Turkey imports about 70% of its total energy needs" and that "at the moment, the largest part of its energy (both gas and oil) comes from Russia, followed by Iran" (European Commission, 2007).

The majority of Turkey's natural gas is supplied from Russia. Natural gas is also imported from Azerbaijan and Iran directly through the pipeline link. Turkey also purchases some liquefied natural gas from Algeria and Nigeria. About 90% of Turkey's oil is imported, primarily from Russia. In addition to Iran which supplies large quantities of oil, Saudi Arabia, Iraq, Syria and Libya are also suppliers to Turkey (Energy Information Administration 2011).

A process of liberalization and privatization in the oil and gas sector is underway in Turkey. Major companies, such as Tüpraş and Petrol Ofisi, which were formerly state-owned, are now privatized entities (Republic of Turkey Prime Ministry Privatization Administration 2011). BOTAS, a company that operates oil and gas pipelines, is being restructured to allow private enterprises to enter the gas marketplace (BOTAS 2007). The government has also passed liberalizing legislation – including the Natural Gas Market Law in 2001 and the Petroleum Market Law in 2003. In addition, the Energy Market Regulatory Authority was created to regulate Turkey's electricity, natural gas, petroleum, and LPG markets (Energy Market Regulatory Authority 2007).

The Turkey 2011 Progress Report notes that with respect to energy, "There has been good progress with regard to electricity, renewable energy and energy efficiency, as well as on security of supply. Developments in the fields of natural gas, nuclear energy, nuclear safety and radiation protection require further efforts" (65).

Trends in Mining

Turkey currently possesses over 50 different minerals including chromite, its most abundant metal product, as well as iron, copper, gold, zinc, antimony, boron, magnesite, perlite, pumice, and feldspar. There is still great potential for future discoveries using modern exploration techniques since many areas within Turkey's mining districts have not been fully explored. In addition, the government has simplified regulations and improved laws surrounding foreign joint ventures. These recent changes have led to an increase in mining activities, particularly in relation to copper, gold, nickel and zinc (Empire Mining 2011).

Turkey has substantial gold mines that are underutilized. As the price of gold increases worldwide, gold production increases in Turkey. Previously, mines capable of producing 1 gram of gold per 1 ton of rock were utilized, but this figure has since decreased. Between 2008 and 2010, gold production tripled to 17 tonnes from four active mines, and Turkey leads Europe's gold production market. In the first six months of 2011, gold production was over 10 tons and was expected to rise to 25 tons by the end of the year. The General Coordinator of the Turkish



Gold Miner's Association, Muhterem Kose, states that there are productive mines in Usak, Kisladag-Gumushane, Mastra-Bergama, Ovacik, and Erzincan. In addition, production will start this year in Izmir-Efemcukuru, Eskisehir-Sivrihisar and Nigde-Ulukisla (Hurriyet 2011).

In 1985, for the first time, foreign companies were given permission to search for gold in Turkey, after which seventeen companies became involved in this process. One of the most active gold mines in Turkey now operates in Ovacik. There have been some difficulties with environmental groups trying to stop production because of objections over the use of gold cyanidation. However, there are also rumors that different interest groups stage protests as they themselves are interested in the production of gold.

GENERAL SECURITY SITUATION

Internal Security

Several terrorist groups are active in Turkey. Past terrorist threats have warned of attacks against tourists and in locations frequented by foreigners. While a low number of attacks have occurred in cities and resorts, attacks have typically been aimed at the government, military, and rural civilian targets. The largest terrorist acts have been orchestrated by the separatist Kurdistan Workers Party in Turkey's eastern provinces, particularly Hakkari, Sirnak, Siirt, and Tunceli. Currently, some of the highest terrorist activity takes place in these areas, and visitors are advised against unnecessary travel in this region (Foreign & Commonwealth Office 2011b).

Demonstrations and protests also occur in some of Turkey's major cities. While they are often peaceful, there is also the possibility that these events can get out of hand and turn violent. The police typically deal with such events by taking measures, such as the use of tear gas, to control the crowds. (Foreign & Commonwealth Office 2011b).

External Security

In spite of the complex and complicated relationships that Turkey has with its neighbors, none of these countries currently pose an external threat to Turkey. However, worsening political relations with any country could hurt Turkey in the long run. Verbal clashes with Israel might provoke more problems with a catalytic effect. One such area of complexity is the joint Cyprus-Greek-Israeli effort to look for oil in the Mediterranean Sea, which goes against Turkish interests. How the uprising in Syria plays out will also impact Turkey's security. As well, any problem with Iran could result in a reduction of oil supplies to Turkey.

Although it may seem that Turkey is opposing the wishes of the United States and Europe, it will continue to maintain good relations with western countries. As a result, there will be no external threats to Turkey from either the US or Europe.

The greatest terrorist threat to Turkey is from the PKK. This struggle has yet again garnered international attention in recent months, as the PKK has increased its attacks in the southeastern portion of the country. The PKK has perpetrated terrorist attacks against Turkey since 1984, and the insurgency has caused the deaths of over 40,000 people since the 1980s (Arsu 2011b). PKK violence calmed in 1999 with the capture of the PKK leader Abdullah Öcalan but flared up again in 2004. In early October 2007, the PKK attacked and killed 13 Turkish soldiers near the Iraqi border. The Turkish public responded with an outpouring of anger and the Turkish parliament authorized cross-border attacks on the PKK. History repeated itself in 2011. During the late summer and fall, attacks increased in rural and urban areas, and the



Turkish military retaliated with airstrikes and artillery attacks against PKK bases in northern Iraq, killing a few hundred militants. In October 2011, Kurdish militants killed at least 24 Turkish soldiers near the Iraqi border. Turkey responded by sending hundreds of troops into northern Iraq in a counterattack (Arsu 2011b).

The PKK will continue to be a threat as long as it finds fertile ground from which to operate in Northern Iraq. However, judging by the events of October 2007 and 2011, it seems that there is now more awareness of this problem in the United States and the EU as compared to previous times. Both the Iraqi and Kurdish populations in Northern Iraq do not want to lose Turkey as their trading partner and have an enemy at their border. As a result of all these factors, as long as the United States backs Turkey and continues with its policy of treating the PKK as a terrorist group as dangerous as Al Qaeda, Turkey can address the PKK threat even if the Iraqi government does not assist in these efforts.

CONCLUSIONS

The Republic of Turkey is a stable, peaceful, democratic, and secular country in a region full of conflicts. In the current post-September 11 world in which there has been a trend towards the polarization of East and West, Turkey is better poised to bridge these differences, real or perceived, than any other country in the world. In the years ahead, Turkey will likely continue to be a strong ally of the United States and the EU as a member of NATO, while also continuing to build regional alliances. For its part, the United States must approach Turkey with the understanding that a strong relationship with Turkey is mutually beneficial to both countries. With continued reform at home and with the support of its allies, Turkey undoubtedly has a very important role to play in achieving development and peace in the region and in the world.

Scenario 1: Positive Relations, Continued Peace and Growth (Likelihood 45%)

In the last decade Turkey has become richer and stronger, and this development will continue in the long-term future. The economic boom has made Turkey a wealthier country with a secure location (at 17th place) in the group of the twenty richest nations. Its growing profile in the Arab world has emerged as one of the region's most remarkable dynamics (Shadid 2011). The governing AKP party strengthened its position in the June 2011 elections. It is expected that for the foreseeable future, the AKP will continue to run the country with a meager opposition and become even stronger domestically. The country will continue to be an ally of the United States and a member of NATO but will make more independent decisions and unexpected alliances. This will be required for Turkey to achieve its objective of continued economic growth and development into a regional power. The government will be successful in significantly diminishing the PKK terrorist threat, which will strengthen its position domestically. The economy will continue to grow, foreign investments in Turkey will continue to increase, significant investments will be made in developing infrastructure, and additional employment opportunities will be created for the youth.

Turkey will flex its muscles to make sure that it is respected in the region but will also behave in a manner that will not jeopardize its security in any way. Turkey's government will also be flexible enough to maintain good relations with any new regimes that come to power in the Middle East and North Africa.

Scenario 2: Maintaining the Status Quo (Likelihood 45%)



In this scenario, Turkey will maintain the status quo. There will be continued but more limited growth, reasonable inflation, and a reasonable export deficit. Political conflicts that arise with neighbors and others in the international community will mainly be addressed through peaceful and diplomatic means. The PKK terrorist threat will not be eliminated, but it will be kept under control.

Scenario 3: Internal and Regional Conflicts Hinder Prosperity (Likelihood 10%)

Turkey is located in a very volatile region that is undergoing many political and economic changes. Emboldened by domestic and regional support and prosperity, the government could potentially make foreign policy decisions that result in powerful enemies. These enemies could create economic problems such as cutting off trade or energy transport, which could threaten successes. A major security challenge will continue to be the ongoing conflict with the separatist PKK. Additionally, unemployment and inflation will have a negative impact on growth. As well, earthquakes and a lack of emergency preparedness could create major problems for the country. Finally, relationships with neighbors might be threatened as a result of terrorist activities and the curtailment of energy flows.



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