

A Precarious Interdependence Between Russia and Turkey: Economic Cooperation, Energy Ties, and Sanctions

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This paper addresses three crucial questions that keep pundits and scholars busy: (1) The growth of bilateral trade in 2023 was astounding, yet we can see that it has grown even more asymmetrical (i.e., Russia benefits more than Turkey does). What should we make of the 70 billion USD per annum trade volume? (2) In what areas does Turkey comply with EU and US sanctions against Russia? Can Ankara be enticed to comply more, and how? (3) Turkey seeks to diversify its dependence on Russian energy, but how realistic is this quest? What alternatives are there for diversifying Turkey's energy resources? Finally, its conclusion offers practical policy recommendations.

Introduction

For policymakers in Ankara, Russia's invasion of Ukraine in February 2022 was a grim reminder of the ongoing volatility in the wider Black Sea region. Resorting to its age-old conventional diplomatic tool of neutrality, the Ankara government has sought to keep equidistance from warring parties but also made clear that it does not condone Russia's land grab. Even before the invasion, Turkey condemned Russia's recognition of the so-called "Republics of Donetsk and Luhansk," claiming that this was "a violation of Ukraine's territorial integrity... [effectively] undermining the Minsk Process" (MFA, 2022a). On the day of the invasion, Turkey rejected Russian claims and stated that "the military operation [was] an unacceptable violation of international law," and called for an immediate cessation of "this illegal and unlawful act of violence (MFA, 2022b).

Then, on the third day of the invasion, Turkey invoked Article 19 of the Montreux Convention, declaring that the developments amounted to war in the region, shut down the passage of warring countries' warships through the Turkish Straits, and asked other countries not to send their warships to the Black Sea either (See *Global Strategic Insight* No 2024/1). More than two years through the war, the

geopolitical climate remains precarious, and many observers point to the delicate nature of Russian-Turkish relations. As much as the pundits emphasize geopolitics as a dictating determinant on the ground, we should -and indeed could- not ignore the growing trade and energy ties between Ankara and Moscow, demonstrating the resilience of non-political aspects of the relations that undergird Turkey's neutrality, without which the balance of power in the Black Sea region could easily tip.

Indeed, the impact of economic connections on Turkish-Soviet/Russian relations has largely been ignored in political analysis, weakening their ability to explain the various intricacies of the partnership. Since the early 1920s, Ankara and Moscow have carefully used economic cooperation to manage their conflicting interests. The two states have inhabited a post-imperial space with a legacy of geopolitical confrontation that cannot be easily aligned. However, they have developed a strong trade connection and economic ties that rendered armed conflict too costly for both sides. Indeed, co-existing episodes of conflict and cooperation defined Turkish-Russian relations across the past century.

Early Years of Economic Cooperation

In the aftermath of the First World War, Moscow extended aid to Ankara because Turkish revolutionaries, like their Russian counterparts, faced the consequences of rejecting the terms of the post-World War One international order. Between 1920 and 1922, Soviet military and financial assistance helped Turkish forces defeat European occupying armies. By the 1930s, Moscow was able to send equipment and engineers to build two textile factories (in Kayseri and Nazilli) that were the centerpieces of Turkey's First Five-Year Plan - accidentally the first Soviet-advised plan voluntarily adopted by a foreign state.

The tensions between Turkey and Russia unleashed during the early years of the Cold War (roughly between 1945 and 1954) have never been fully put to rest, but as early as 1957, Moscow and Ankara began to temper political conflict in the name of economic cooperation. At the height of the Cold War and despite membership in opposing blocs, Moscow revived the earlier commitment to industrialize Turkey and contribute to building several factories across Anatolia. For example, the factory completed in Seydişehir in 1972 remains Turkey's only large-scale aluminum production site. The steelworks opened in İskenderun in 1975 is still the biggest in the country. The oil refinery built with Soviet support in Aliğa in 1972 was the third [MA1] [O12] refinery built in Turkey after Batman and İzmit and supplies 25% of the country's petroleum even today. Moscow also built a sulfuric acid plant in Bandırma and a lumber factory in Artvin but did not complete two intended projects that were clearly seen as less vital to state interests: the expansion of the glass factory in Çayırova and the addition of a vodka facility to the Turkish state distillery with an annual capacity of two million liters (Hirst and İsci 2020).

Beyond the engineering support and types of machinery received for various factories in Turkey from Russia, Turkey also became the country that received the largest amount of foreign economic aid from the Soviet Union during the Cold War, apart from Comecon countries. In the post-Cold War era, Russian-Turkish economic relations and energy ties

developed extensively. As before, economic cooperation persisted despite numerous conflicts of interest. Throughout the 1990s, compartmentalizing their relations, Moscow and Ankara suppressed the issues that divided them and furthered bilateral economic and trade relations. More than anything else, a revived and shared commitment to economic development undergirds the rapprochement between the two countries. The frequency of high-level state visits devoted to economic cooperation in the 2010s matched the exchanges in the 1930s and 1960s. The barter system that existed from the 1920s until the 1980s is gone, but Presidents Erdoğan and Putin have repeatedly spoken about the need to move Russian-Turkish trade off the dollar and into local currencies (Kommersant December 2, 2016; Cumhuriyet October 2, 2016). The TurkStream pipeline, whose construction between 2014 and 2018 halted only temporarily after the downing of the Russian jet, was one more step in the deepening ties between Ankara and Moscow.

The apogee of today's Russian-Turkish economic development -the nuclear power station under construction in Akkuyu- offers the most apparent evidence of the past century's patterns. If completed, Akkuyu will be a Russian-owned hamlet on the Mediterranean and is very much in the tradition of joint enterprises. The 2010 agreement signed between the Russian Federation and the Turkish Republic stipulates that the Russian side will own a minimum of 51% of the plant's shares for the entirety of its existence. As with previous projects, the terms of payment for Turkey are generous. Ankara pays nothing until the electricity arrives and then pays through a guaranteed purchase of set quantities from each reactor for fifteen years (*Resmi Gazete*, October 6, 2010).

The War in Ukraine has the potential to change this delicate equilibrium. In addition to its political evaluations, the Turkish government refuses to comply fully with the Western sanctions to avoid incurring the ire of Moscow and benefit from the increased trade opportunities for its frail economy. Still, Ankara is acutely aware that there needs to be some level of cooperation with the US and the EU, given its strong economic ties with the West.

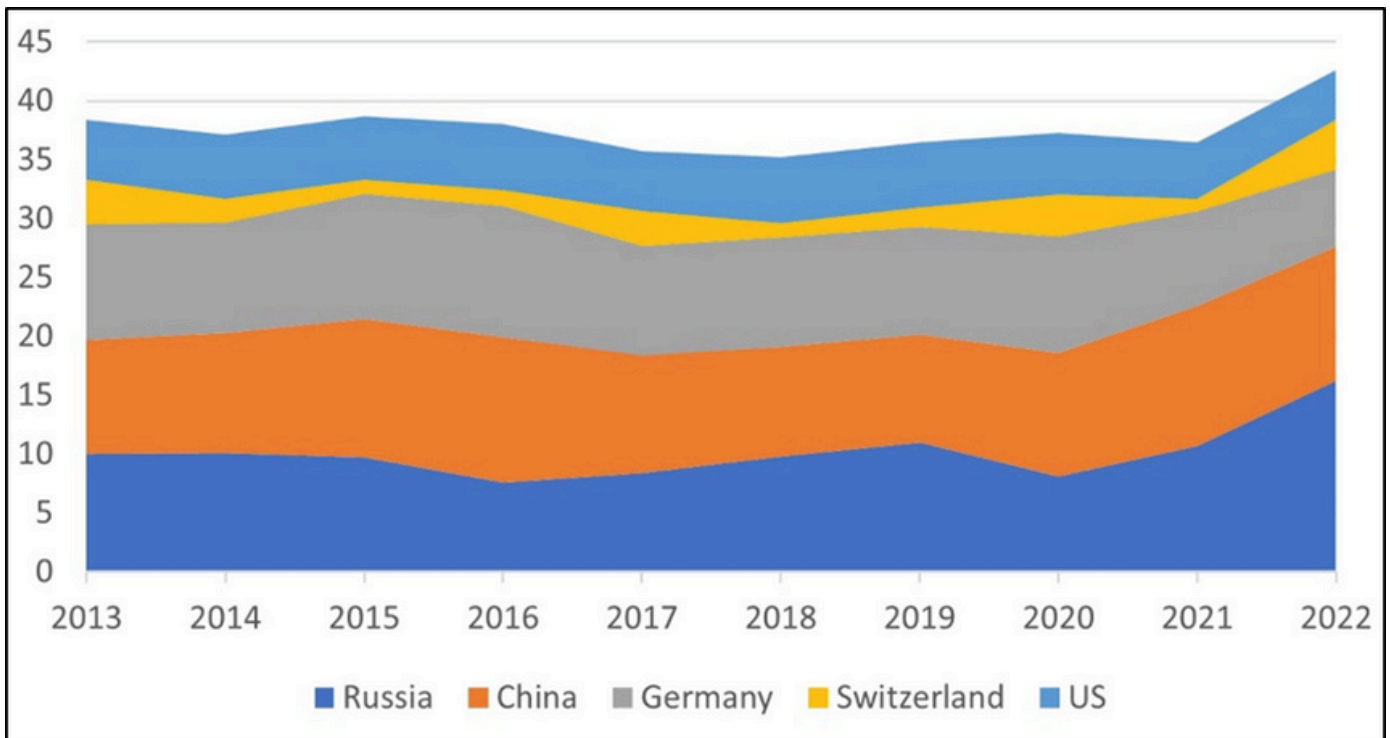
Economic Partnership vs Dependency

Turkey maintains strong economic relations with Western countries and their adversaries, including Russia and China. Turkey's reliance upon Russia -the largest supplier of Turkey's energy imports (TUİK 2023)- is particularly striking and has raised questions about political dependency. Indeed, before February 2022, scholars described the Russian-Turkish relationship as an asymmetric interdependence (Köstem 2018: 10-32), pointing to Turkey's massive deficit in bilateral trade and Moscow's successful leveraging of economic power through imposing sanctions after the downing of a Russian jet by the Turkish forces on the Turkish-Syrian border in November 2015. Today, more than two years after the Ukraine invasion began, that interdependence has grown, but Russia's international isolation makes the power asymmetry less pronounced. Gamio and Swanson (2022), in their piece in *The New York Times*, used dramatic visuals to highlight Turkey's increased trade volume (+198%

increase compared to the previous year) with Russia in their study of Moscow's financing of the war effort.

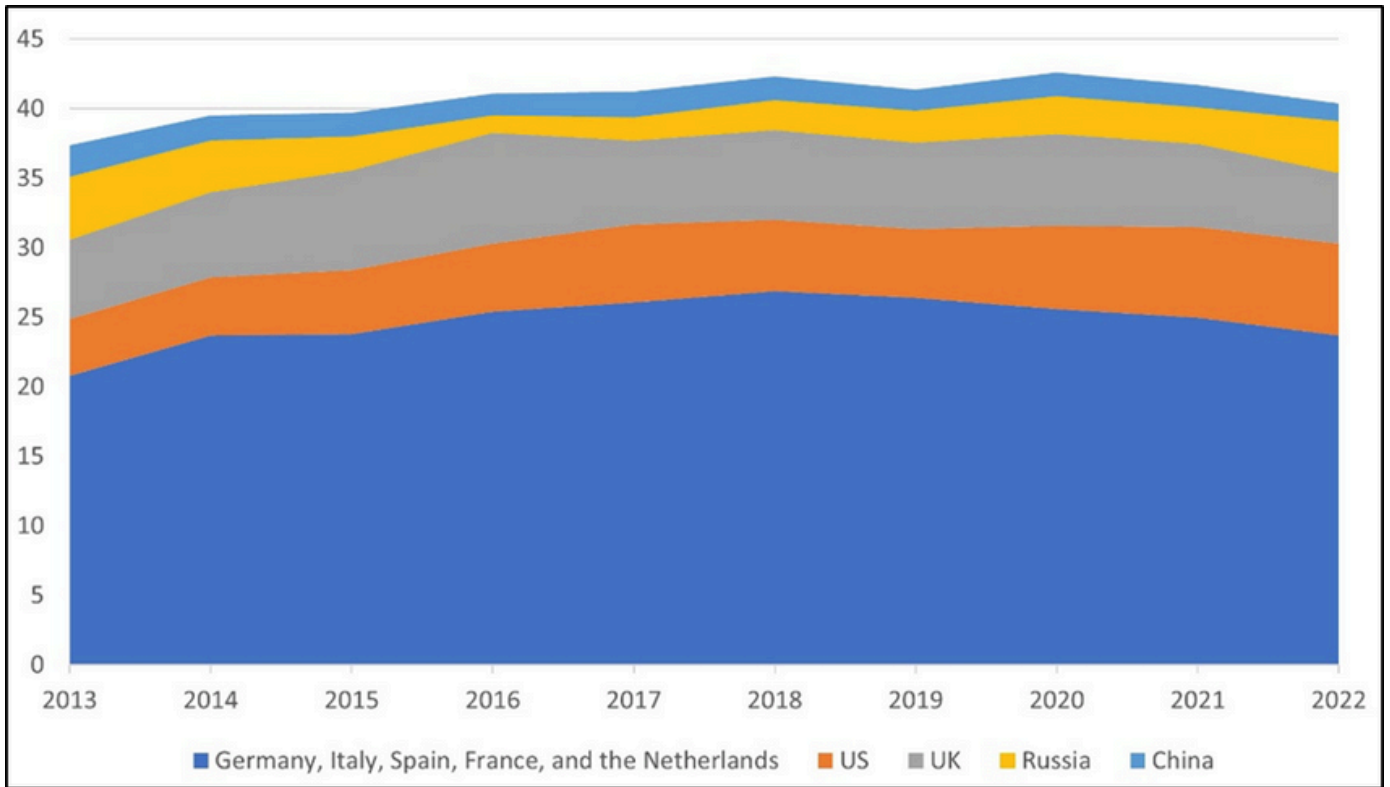
However, Russia's significance for Turkey's economy should not be overstated, as the West remains a critical component of Turkey's economy. Turkey's per capita gross domestic product tripled in the first decade after the Justice and Development Party (AKP) came to power in 2002, and economic success was overwhelmingly dependent upon integration into European markets. While Turkey's financial performance has been less impressive in the 2010s, it continues to benefit from cheap labor for manufacturers oriented towards the European market. As cliched as the platitude about Turkey being a bridge between East and West is, it helps to describe trade flows: Turkey imports energy from Russia and goods from China (Figure 1) to cover domestic demand, and local factories assemble components for Europe (Figure 2). Turkey's most significant trade surpluses are close to home -with countries like Azerbaijan and Iraq- but the European market allows Turkey to maintain an export-oriented manufacturing sector of scale.

Figure 1: Turkish Imports (as a percentage of total)



Source: <https://data.tuik.gov.tr/Bulten/Index?p=Dis-Ticaret-Istatistikleri-Aralik-2022-49633>

Figure 2: Turkish Exports (as a percentage of total)

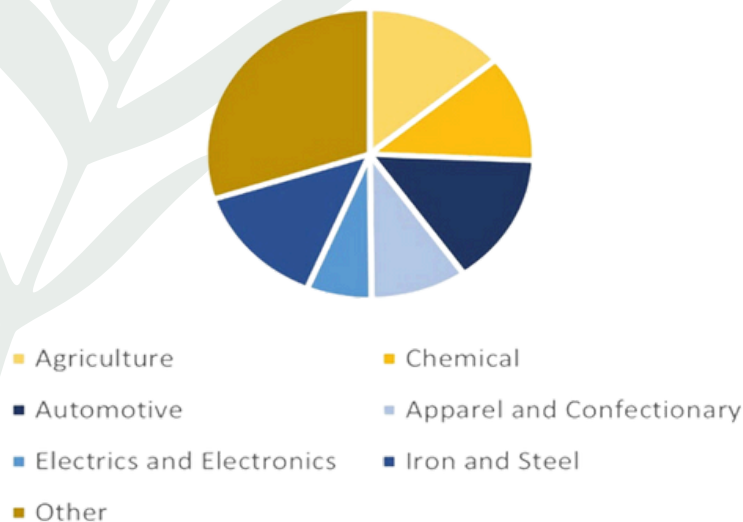


Source: <https://data.tuik.gov.tr/Bulten/Index?p=Dis-Ticaret-Istatistikleri-Aralik-2022-49633>

In their study, Gamio and Swanson (2022) showed a 113% increase in Turkish exports to Russia over the year since the war, but that was growth from a low starting point and still represents a fraction of Turkey's total. The automotive, textile, and steel industries account for an enormous share of Turkey's exports (Figure 3), and European consumers buy much of that production. For the past decade,

Germany has consistently been the largest purchaser of Turkish exports, with the automotive and textile industries accounting for more than half of Turkish sales (TÜİK December 2022). Considering the Turkish economy's dire need to earn/attract large amounts of hard foreign currency, Europe's role in Turkey's near-to-mid-term future is unquestionable.

Figure 3: Composition of Turkish Exports (Avg. 2019-2022)



Source: <https://data.tuik.gov.tr/Bulten/Index?p=Dis-Ticaret-Istatistikleri-Aralik-2022-49633>

Official trade statistics tell only part of the story, but almost any sector would confirm Turkey's simultaneous ties to the West and its competitors. While US officials complain about reexporting Western-produced microchips and critical chemicals from Turkey to Russia (Spicer, 2023), Turkish leadership continues to insist that it prohibits the export of materials that would aid Russia's military (Reuters, February 20, 2023). Beyond this, however, what seems to be the real source of apprehension in the West is the steady increase in trade volume, including Western-produced goods, since the beginning of the Russia-Ukraine War.

If we look at the long curve of Russian-Turkish trade relations since the end of the Cold War, it is possible to see a pattern. Turkey needs to pay for energy imports with revenue from a manufacturing sector integrated into European markets. Given the breadth of Western sanctions against Russia, aggravated in 2023 and 2024 with added measures such as the price cap on Russian oil, Turkey's foreign policy decisions get complicated by its economic dependencies on both sides. Indeed, Turkey has significant investments in Russia. Numerous Turkish construction companies work in Russia, the largest being Renaissance Holding. Renaissance built the Lakhta Center in St. Petersburg and the Federation Tower in Moscow City -the two tallest buildings in Europe. Turkey's economic growth has reversed some of the previous patterns: The operations of the Turkish glass company Şişecam - state-founded and owned by the largest commercial bank in Turkey- were dramatically expanded in the late 1950s with the opening of the Soviet-built factory in Çayırova, moved into the post-Soviet market in 2000 and now operates five factories in Russia (Hirst and İşçi 2020, 857).

Energy Ties

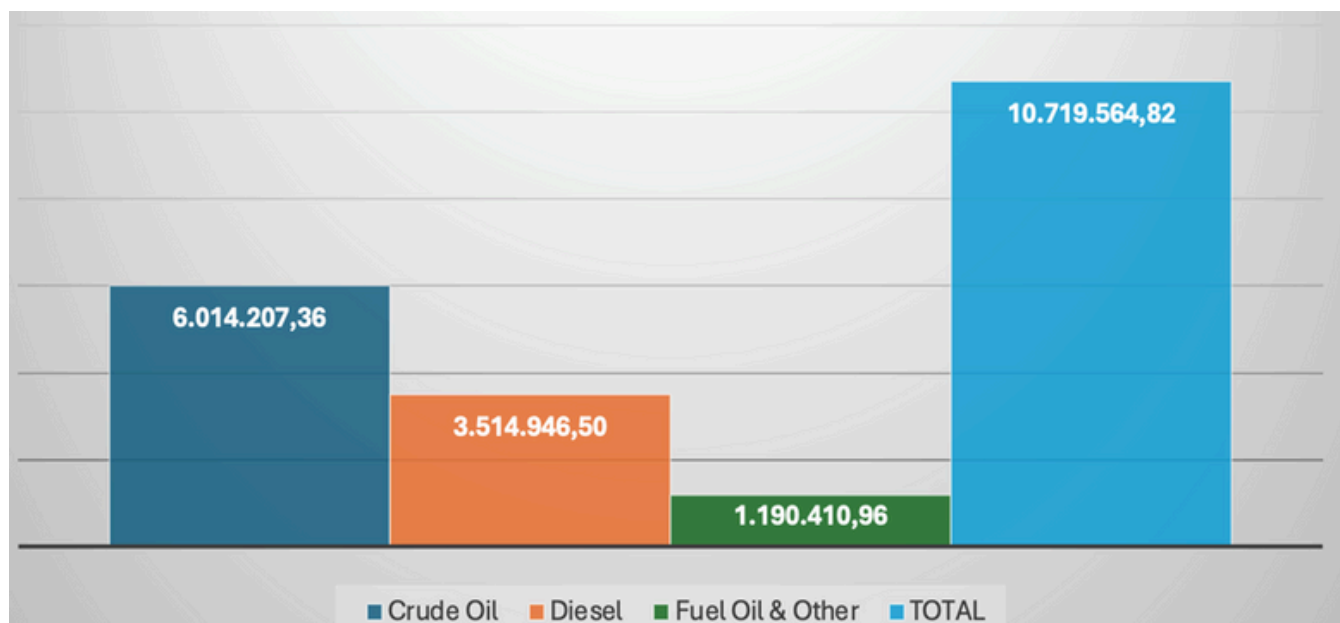
Before Russia invaded Crimea in 2014, beginning with the second half of the 2000s, as the perceived Russian threat declined, Turkey began to see that the benefits of cooperation with Moscow outweighed the dangers of geopolitical conflict (Aydın 2003: 136; Çelikkpala 2019: 6). This opened up the possibility of Turkish-Russian joint energy initiatives, replacing the intense competition of the 1990s over Eurasian energy resources. The completion

of pipeline projects from the Caspian Basin passing through their respective territories (Tengiz-Novorossiysk oil pipeline for Russia and Baku-Tbilisi-Ceyhan (BTC) oil and Baku-Tbilisi-Erzurum (BTE) gas pipelines for Turkey) helped to reduce the intensity of competition. It allowed relations to move from "geopolitical rivalry" to "strategic cooperation." So much so that the then Secretary General of the Turkish National Security Council, General Tuncer Kılınç, described Russia as 'potentially Turkey's most strategic partner' at a conference of military academies in İstanbul on March 6, 2002 (Demir and Erdem 2002).

The backbone of the intensified relations between the two countries was a shared understanding of the benefits of compartmentalizing their relations (Öniş and Yılmaz 2016: 72) and expanding their economic ties even as they competed for political influence in Eurasia (Aydın forthcoming). The decision to separate economics from political issues, including security concerns, was evident in their earlier cooperation in multilateral regional organizations such as the Black Sea Economic Cooperation Organization.

The initial area of cooperation between Russia and Turkey was energy trade (Erşen 2017: 148; Erşen 2011: 264-265). Although the two countries were competitors rather than partners in connecting the Caspian energy resources to Europe, they simultaneously expanded their direct natural gas connection. Turkey and Russia first signed an agreement in 1984 that allowed the purchase of Russian gas in exchange for Turkish products and contractual services. The delivery of 6 billion cubic meters (bcm) of natural gas in 1987 through a pipeline that crossed Ukraine, Romania, and Bulgaria increased to 27.6 bcm by the end of 2017, with two further pipelines (Blue Stream I and II) connecting them under the Black Sea. This made Turkey the second largest consumer of Russian gas to Germany. Another direct connection, the TurkStream pipeline, which would transport 31.5 bcm of natural gas through its two pipelines under the Black Sea to Turkey and Europe, was inaugurated on January 8, 2020 (Anadolu Agency 2020).

Figure 4: Turkey's Oil Imports from Russia (January-April 2024, tons)



Source: T.C. Enerji Piyasası Denetleme Kurumu

Although many questioned Turkey's almost 65 percent dependence on Russian natural gas (Bilgin 2010; Kaynak 2018; Hale 2022), as competition for Caspian resources intensified in the 1990s, successive Turkish governments chose to increase gas imports from Russia in response to rising demand (Kardaş 2012). Furthermore, in May 2010, Turkey commissioned the Russian company Rosatom to build its first nuclear power plant in Akkuyu, Mersin, at an estimated cost of 25 billion dollars. The fact that the nuclear power plant, a strategic asset by any reckoning, will be built, owned, and operated by Russia shows the extent to which the two countries have moved on. Still, frequent questioning of allowing Russia to build and operate a port next to the nuclear power plant indicates that doubts continue to exist in the minds of a section of Turkish society towards Russia.

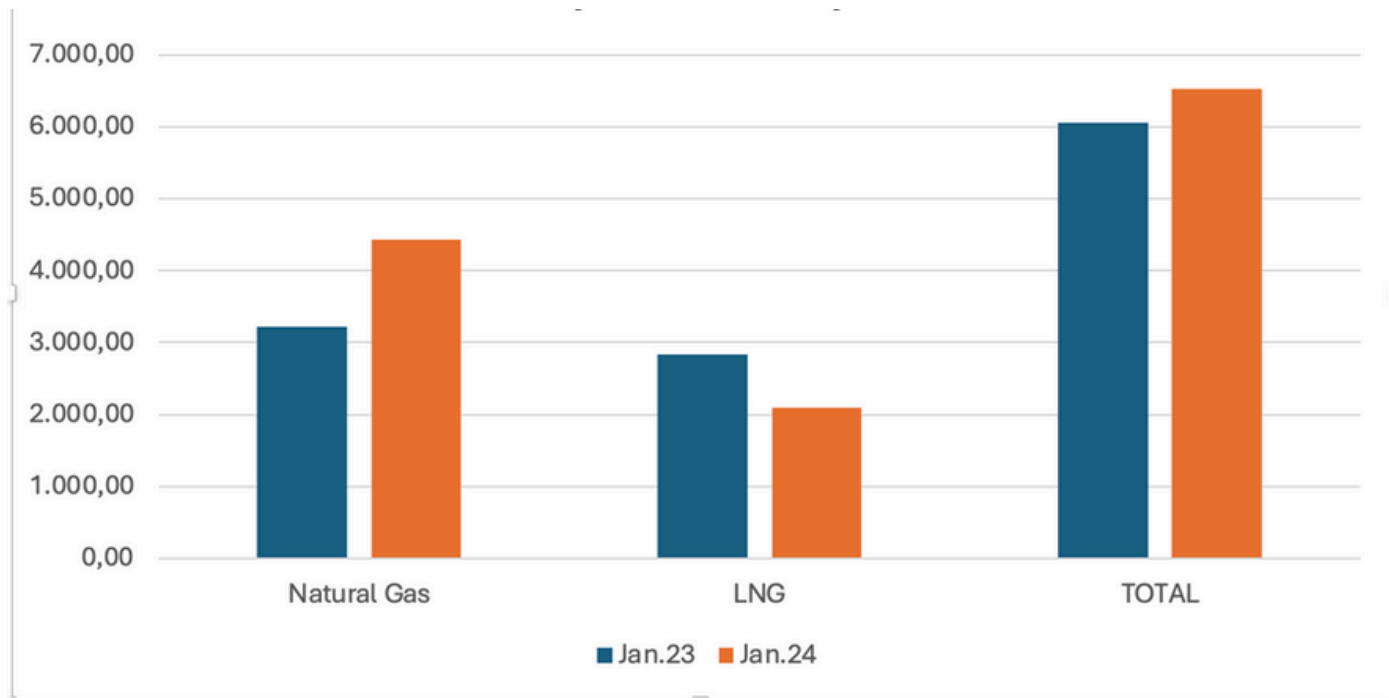
Moreover, around the same time (mid-2010s), the Ankara government signed a liquefied natural gas (LNG) agreement with the US to diversify its energy suppliers. The signature of the contract with the US was aimed at lessening its natural gas dependency on Russia, which dropped from 51-52% in the 2010s to about 38-39% in 2023. Furthermore, in a recent interview with the Financial Times, Energy Minister Alparslan Bayraktar stated that Turkey is finalizing negotiations with ExxonMobil for an annual 2.5 million tons of LNG purchase.

Bayraktar revealed that the agreement would last ten years, and Turkey would pay 1.1 billion dollars annually to Exxon.

According to the data provided by the Energy Market Regulatory Authority (EPDK), Turkey imported 50 bcm of gas in 2023, 14,270 bcm of which came as LNG, while the remaining 36,213 bcm was transported through pipelines (Sağlam 2024). In this scheme, the share of LNG was 28.37 percent, while pipelines retained 71.73 percent. In the previous year, 2022, while Turkey imported 54 bcm of gas, 27.75 percent came as LNG. What is remarkable is that in both years, the lion's share went to Russia. While the rate of gas supplied from Russia was 39 percent in 2022, this rate increased to around 43 percent in 2023. It is noteworthy that Russia maintains its position while the share of LNG in the gas import pie increases. So, where does the US stand in this picture?

Gas exchange between the USA and Turkey began in 2016 after the US lifted the export ban in 2015 and started exporting gas to the global market. Turkey bought 243 million cubic meters of gas from the US in 2016, corresponding to a modest 0.53 percent share of the Turkish market. However, this increase to 10 percent in 2022 means that the US share has grown noticeably in 6 years. In 2023, Turkey added countries such as France, Norway, and Mozambique to the list of countries from which it purchased LNG (Sağlam 2024).

Figure 5: Turkey's Natural Gas Imports, January 2023-January 2024 (Million Sm3)



Source: T.C. Enerji Piyasası Denetleme Kurumu

This was what Bayraktar meant in his *Financial Times* interview: that Turkey should not meet a vital need from a single source. Over 70 percent of the 50 bcm of gas imported in 2023 came via pipelines (Russia, Iran and Azerbaijan). In other words, pipelines are significant, but since they connect Turkey to limited suppliers (especially Russia), it is necessary to eliminate the risk of being left without gas in a political crisis or war. It is difficult because Russia retains 39 percent of Turkey's gas market via the Blue Stream and TurkStream pipelines. And yet, given the volatility in the Black Sea region, Turkey has to diversify its energy suppliers.

This brings us back to why geopolitics impacts Turkey's geoeconomic decisions. US-Turkey negotiations over LNG with a fixed agreement - when the foreign currency is short, and 20% of Gazprom payments are made in local currencies- reflect that Turkey's energy security and NATO/US relations are inextricably linked. In other words, while it may not be possible to sever the country's energy dependence on Russian resources immediately, Turkey has been striving to decrease this dependence one step at a time. There is an acute awareness in the Turkish leadership that the country's energy dependence on Russia is affecting its strategic decisions, which explains Turkey's balancing act between Russia and the West. Hence, it might

be fair to suggest that Turkey's recent attempts to decrease its energy dependence come from an uneasiness regarding the Russian factor in Turkey's foreign policy and a pivot back to the West.

Sanctions Compliance

Turkey's (non)compliance with sanctions against Russia has been a subject of criticism and analysis. The net response is not a straightforward "yes" or "no." The level of Turkey's compliance with sanctions against Russia has evolved over time and has been influenced by various factors such as economic interests, geopolitical considerations, and diplomatic relations.

Turkey, a significant geopolitical actor straddling Europe and Asia, has often needed to navigate complex diplomatic waters. As a NATO member and a candidate for EU accession, Turkey's foreign policy decisions naturally attract international attention, particularly concerning its relationship with Russia. The imposition of sanctions on Russia by Western nations in response to various geopolitical tensions, including the annexation of Crimea and involvement in the conflict in Eastern Ukraine, has placed Turkey in a difficult position.

First, despite geopolitical differences, economic cooperation between Ankara and Moscow has widened over the years, particularly in energy trade, creating an interdependency that cannot be simply discarded. Moreover, existing pipelines like TurkStream and Blue Stream and the Akkuyu Nuclear Power Plant construction underscore Turkey's significant energy ties with Russia. While Turkey benefits from trade and energy cooperation with Russia, it also seeks to maintain strong economic ties with Western allies. Balancing these interests requires careful calibration. Compliance with Western sanctions at the earliest stages would have allowed Turkey to demonstrate solidarity with its NATO partners and align with the broader Western bloc, but it would have heard its painstakingly established connections with Russia.

Moreover, Turkey, in principle, does not comply with international sanctions unless imposed by the UN or NATO. Current Western sanctions are neither. In addition, President Erdoğan, when questioned about them early on, complained that Turkey's Western Allies make decisions without consulting Turkey and then expect Turkey to follow them blindly. Erdogan stated that "a significant portion of the country's natural gas comes from Russia," that "Turkey is building the Akkuyu Nuclear Plant with Russia," and that "he cannot reboot the country's industry without Russian energy" (TASS 2022). Finally, Turkey's past experiences with sanctions imposed on its neighbors by the US and/or the West have not been very pleasant, always costing Turkey more than benefits. Besides, by the time Russia was sanctioned, Turkey itself was facing declared sanctions (such as US CAATSA sanctions) or various types of undeclared embargoes (such as multiple EU countries' ban on selling military goods to Turkey since its operations in Northern Syria) from the West.

Thus, when faced with Western sanctions on Russia, it was not a long step for Turkey to declare its non-participation. However, non-participation does not mean complete non-compliance, primarily because of the possibility of secondary sanctions on countries openly flouting Western sanctions on Russia. As a result, the Ankara government officially has not declared sanctions against Moscow. Yet, over 2024, Turkey has shown a growing willingness to mostly, if not entirely, align with Western

sanctions -especially in reexporting Western-produced goods.

Although sanctions are not binding and Turkey, as a sovereign state, has no legal obligation to participate or comply, Ankara is acutely aware that if the country's corporations want to continue playing a role in global trade, which is conducted through US-controlled banking payment system (SWIFT), a certain degree of alignment with Western sanctions is necessary. In other words, evading sanctions is undesirable for Turkish companies with significant assets in Western countries since the risks are too high.

On the other hand, the US and its European allies cannot sever their trade relations with Russia completely. As a result, Moscow's energy resources continue to flow through Turkey to Europe. According to a recent study by the Centre for Research on Energy and Clean Air (CREA) and the Center for the Study of Democracy (CSD), Russian oil is arriving in the EU via Turkey. The scheme is neither illegal nor secret due to a loophole in the EU sanctions package about the wholesale of "blended" fuels into the EU if they're labeled as non-Russian (CREA-CSD 2024). Another research by Politico suggests that this trade generated up to €3 billion for Moscow from three ports, namely Ceyhan, Mersin, and Marmara Ereğlisi, alone in the 12 months after the EU banned Russia's fuels in February 2023 (Politico 2024). In other words, "Turkey has emerged as a strategic pit stop for Russian fuel products rerouted to the EU, generating hundreds of millions in tax revenues for the Kremlin's war chest," said Martin Vladimirov, a senior energy analyst at CSD.

Aside from oil, Turkey is a strategic pit-stop for various Russian-made Turkey-labelled products, from pasta to wood pellets. Although exports of Russian pellets to Europe -including Denmark, Belgium, Italy, and the UK- have been brought to naught since the beginning of the Russia-Ukraine War, shipments to Turkey surged. Experts claim that "deliveries to Turkey from Russia began in July 2022 and, by the end of that year, reached a total volume of 200,000 tons" (Walker, Olgun, and Tedesco, 2023). Turkey seems unlikely to consume all the pellets domestically, raising questions about Turkey's significantly increased exports to the EU countries -an eight-fold increase in January-October to more than 82,000 tons, with exports

to Italy more than trebling to 5,800 tons. Turkish Statistical Agency figures were considerably more modest than the WhatWood data, showing the country imported 64,000 tons of wood pellets in January-November 2022, of which almost all were from Russia and Belarus.

However, other measures, such as the “price cap” on Russian oil and petroleum products, with which Turkey is compelled to comply, albeit halfheartedly, limit Russian revenues. Energy security has been pivotal in Turkey’s policy calculus vis-à-vis Western sanctions. While Russia remains a key energy supplier, Turkey has sought to diversify its sources to reduce dependency. Investments in renewable energy and exploration projects in the Black Sea and Eastern Mediterranean reflect Turkey’s efforts to enhance energy security. Turkey’s nuanced compliance with Western sanctions against Russia could be part of this broader strategy to diversify energy sources and reduce vulnerability to geopolitical fluctuations. Hence, Turkey’s compliance with Western sanctions against Russia primarily intersects with its regional aspirations and security concerns. For instance, the conflict in Syria, where Turkey and Russia back opposing factions, underscores the complexities of their relationship. While Turkey has cooperated with Russia on specific issues, such as the Astana peace process, it remains wary of Moscow’s influence in the region. As such, increasing compliance with Western sanctions reinforces Turkey’s alignment with and signals its commitment to the broader Western security architecture.

Put succinctly, Turkey’s partial compliance with Western sanctions against Russia is a testament to its diplomatic balancing act. Economic considerations, energy security imperatives, regional dynamics, and diplomatic pragmatism all shape Turkey’s stance on the issue. By broadly aligning with Western sanctions without openly admitting, Turkey reaffirms its commitment to its allies and demonstrates solidarity with its NATO partners while not unduly alienating or confronting Russia. Ankara’s approach is likely to remain nuanced, reflecting its broader foreign policy objectives and the complexities of its relationship with Russia. As Turkey navigates geopolitical challenges, its compliance with Western sanctions against Russia will remain critical to its policy calculus.

Conclusion and Recommendations

Turkey’s geographic proximity to Russia, along with its historical, cultural, and economic ties, add layers of complexity to its diplomatic stance on the War in Ukraine since 2022. Ankara has often emphasized the importance of maintaining open communication channels with Moscow, pursuing a policy of engagement alongside containment.

Almost exclusively, Turkey’s foreign policy approach is characterized by pragmatism and maneuverability. While it seeks to maintain cordial relations with Russia, particularly on issues like Syria and counterterrorism, Turkey also values its ties with Western allies. Although, as a sovereign state, Turkey is not legally bound to do so, Ankara’s varying degrees of compliance with Western sanctions against Russia reflects the country’s diplomatic pragmatism, allowing Turkey to balance competing interests and navigate a complex geopolitical landscape. It would be fair to suggest that Turkey could enhance its credibility as a reliable partner within the transatlantic alliance by further aligning with Western sanctions.

While Turkey complies more with Western sanctions against Russia in 2024, its overall stance is nuanced and shaped by the abovementioned factors. As Turkey navigates its relations with Russia and the West, its approach to sanctions enforcement will remain dynamic and contingent on evolving geopolitical realities and energy ties. In this context, its Western allies should be sympathetic to Turkey’s balancing act, considering the economic challenges Ankara faces and the instability in the energy-rich countries in its neighborhood. Given Ankara’s recent efforts to diversify its energy sources and routes, further Western support to prop up Turkey’s needs could bring Ankara closer to the Western world in the medium and long term. Western allies have tolerated Ankara’s behavior in the face of sanctions, at least until now. Given that the limits of this tolerance will depend on the evolution of the war and the extent of Russia’s aggressive behavior, Turkish decision-makers must be aware of the rugged terrain ahead. Decision-makers in Ankara should be

prepared for possible challenging scenarios and formulate alternative solutions.

Russia did not use the energy card against Turkey even after the downing of the Russian fighter jet in 2015. In this context, maintaining the mutual trust between Ankara and Moscow and relatively balancing the asymmetric trade volume are topics that Moscow should address. At least in the medium term, the image of only Moscow benefiting from the increasing trade volume needs to be corrected.

Ankara's priority is to dispel the image that bilateral trade benefits Moscow's war machine. It should be remembered that addressing this issue is crucial not only for a sustained relationship with Western allies but also for putting Ankara on a sound footing with the Black Sea littoral states, notably Ukraine, which perceive threats from Russia.

As Ankara develops its new energy strategy, it would be prudent to keep the channels of diversity and cooperation with Western elements open, keeping in mind that the instabilities in the north and south are long-lasting. Developing energy relations with the US is only one aspect of this. It would be appropriate for Western allies, especially the US, to act to convince the Turkish public that this new trade will create reliable and sustainable alternatives to Russia.

Finally, considering that the energy issue has influenced and determined Turkey's foreign and security policies as much as its economic policies in the last two decades, the importance of maintaining relations with all parties in a way that does not negatively affect each other should be kept in mind.

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