



<https://doi.org/10.48269/2451-0610-ksm-2023-1-005>

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Turkey – the big winner or the big loser of the Russo-Ukrainian war?

Introduction

Turkey skilfully exploits its geographical position and advantages to gain status as a regional power and an important international player.¹ Shortly after the Russian aggression against Ukraine, voices criticized Turkey for its balancing posture between NATO and Russia. More than a year after the beginning of the Russian-Ukrainian war, it is clear that Ankara is trying to look after its interests, including economic ones. It is also hoping to gain the status of a mediator who has helped to bring peace between Moscow and Kyiv. Turkey is keen on peace and the return of its interests with both countries before 24 February 2022. Analysing Turkish-Ukrainian and Turkish-Russian

¹ The article was realized as part of the Preludium 16 project of the Polish National Science Center (NCN): Ankara balancing between Washington and Moscow. Turkish-American and Turkish-Soviet bilateral relations in 1945–1952, Agreement No. UMO-2018/31/N/HS3/00661 (2019–2022).

relations for more than a year since the war's outbreak and the conflict's impact on Turkey, one can ask whether it will gain or lose more in the international context with its stance. Will it become the big winner or the big loser of this conflict, and how will President Recep' Tayyip Erdoğan's balancing policy affect the domestic situation in the country?

Turkish-Russian relations

Due to its strategic location as a 'gateway' between the Middle East and the Balkans and guarding the passage from the Mediterranean to the Black Sea, Turkey has been an important ally or dangerous adversary in various conflicts. After the experience of the First World War, when the Ottoman Empire sided with the Central Powers, which lost the war and paid for it with the loss of a large part of its territory, the Turkish elite wanted to avoid entangling the state in another war at all costs. It balked for most of the Second World War, declaring war on the Third Reich and Japan only in February 1945. Given the situation of the Cold War period, Ankara could not remain in a neutral stance.²

In the 21st century, after the Justice and Development Party (Adalet ve Kalkınma Partisi, AKP) came to power, it returned to a policy of balancing between 'East' and 'West,' defined as Russia and the US/NATO. Turkey's attitude after the Russian aggression against Ukraine represents one dimension of this balancing act.

When analyzing the consequences that the Russo-Ukrainian war will have for Turkey, it is essential to realize the interests the countries shared before the outbreak of the conflict. Turkish-Russian relations in the 21st century were shaped correctly and depended on mutual interests and areas of rivalry. The biggest crisis of recent years occurred in 2015 when a Turkish F-16 shot down a Russian Su-24 aircraft that was alleged to have violated Turkish airspace.³ The Russian side disagreed with this version of events, which believed that the plane had not violated Turkish airspace, so the use of force was unjustified.⁴ After the incident, the rank of mutual diplomatic relations

² More K.W. Olszowska, "The significance of the Black Sea in Turko-Soviet relations in 1939–1946", *Folia Historica Cracoviensia*, vol. 27, no. 2, 2021, pp. 43–61.

³ *Eadem*, "Trudne sojusze Turcji", [in:] *Konteksty dla Trójmorza. Turcja, Bałkany Zachodnie i Europa Środkowo-Wschodnia w polityce międzynarodowej*, red. *eadem*, Kraków: Regionalny Ośrodek Debaty Międzynarodowej, 2020, p. 104.

⁴ "Главнокомандующий ВКС России представил фактическую картину атаки 24 ноября турецкого истребителя F-16 на российский самолет Су-24М в небе над Си-

dropped significantly. The Russian administration imposed an embargo on Turkish food products, cooperation in the economic and military spheres was suspended, and the number of Russian tourists traveling to Turkey dropped by 90%.⁵ It was Ankara that first bent to improve relations. Both sides tried to escape the crisis ‘with a face’; according to the Turkish side, President Recep Tayyip Erdoğan sent a statement to President Vladimir Putin explaining how important Moscow was for Ankara and was said to regret the situation. On the other hand, the Russian side maintains that the Turkish president apologized for the downing of the plane.⁶ Regardless of the actual content of the message, the goal was achieved, and on 27 June 2016, the two countries re-established close cooperation.

Gazprom immediately declared its readiness to resume talks with Turkey’s BOTAŞ Petroleum Pipeline Corporation regarding constructing the Turkish Stream offshore gas pipeline. Both parties are keen to build this pipeline; the contract for Türk Stream (then Turkish Stream) was signed on 10 November 2016. Construction of the first line of the offshore part started on 7 May 2017.⁷ This investment is necessary for Moscow, as it reduces Russia’s dependence on transit through Ukraine.

Russia is one of Turkey’s most important trading partners. The volume of trade between the two countries reached in 2019. USD 26 309 billion, with Turkish exports worth USD 3 854 billion and imports worth USD 22 454 billion.⁸ In August 2021, Trade Minister Mehmet Muş announced that Turkey and Russia aim to increase trade volumes to USD 100 billion and increase cooperation in energy, industry, agriculture, and tourism.⁹ In 2022, Turkish exports to Russia rose to USD 9,340 billion, and Russian imports to Turkey

рией”, Министерство обороны Российской Федерации (Минобороны России), https://function.mil.ru/news_page/country/more.htm?id=12066900 [accessed: 12.04.2023].

⁵ K.W. Olszowska, “Przyjaciół Ameryki, sojusznik Rosji? Zawłóści tureckiej polityki zagranicznej”, *Zeszyty Naukowe Towarzystwa Doktorantów Uniwersytetu Jagiellońskiego. Nauki Społeczne*, nr 18(3), 2017, p. 32.

⁶ *Eadem*, “Trudne sojusze Turcji”, *op. cit.*, p. 104.

⁷ *More Eadem*, “The intricacies of (un)lasting Turkish-Russian alliances”, *The Warsaw Institute Review*, nr 3(14), 2020, pp. 82–83.

⁸ “Relations between Turkey and the Russian Federation”, *Republic of Türkiye – Ministry of Foreign Affairs*, www.mfa.gov.tr/reasons-between-turkey-and-the-russian-federation.en.mfa [accessed: 12.04.2023].

⁹ “Turkey vows to rev up trade with Russia to reach mutual \$100B goal”, *Daily Sabah*, 1.08.2021, www.dailysabah.com/business/economy/turkey-vows-to-rev-up-trade-with-russia-to-reach-mutual-100b-goal [accessed: 12.04.2023].

were USD 58,850 million.¹⁰ Turkey has not joined the Western sanctions on Russia. It has even become a trading platform between Russia and Western countries. Of course, the US is aware of Turkish assistance in circumventing sanctions. In April 2023, the US State Department imposed sanctions on a minimum of four entities based in Turkey that assisted in the transfer of 'dual-use' goods and thus helped the Russian war effort.¹¹

An important issue for the Turkish economy was Russian tourists, who continue to be one of the largest groups, and tourism is an important sector of the Turkish economy. It is also worth noting that the Russian authorities have already used tourists as a tool to put pressure on Turkey. An example from 2021 is worth mentioning when Turkish Bayraktary TB2 drones sold to Ukraine bombed Russian positions in the Donbas. President Erdoğan stressed internationally that Crimea should be returned to Ukraine. Russia responded by halting air links with Turkey. Moscow justified the move with the epidemiological situation related to the SARS-Cov-2 virus outbreak. Anna Popova, Russia's chief sanitary doctor, reported that among Russians who had returned from abroad and tested positive, as many as 80% were in Turkey. Initially, flights were halted from 12 April to 1 June, a decision taken even though 533,000 Russians had already purchased trips to Turkey during this period. The ban was then extended further until 21 June.¹² After the outbreak of war, Russians were no longer just a tourist movement. Russians also became the largest group of foreigners to buy property in Turkey, among them the Russian oligarch Roman Abramovich, who rented property in Istanbul for \$50,000 a month. Turkey has enabled the Russian capital to evade sanctions, with Russians launching more than 1,300 companies in the Bosphorus country in 2022, 670% more than the year before.

The construction of the Akkuyu nuclear power plant in Mersin province was also an essential joint venture; the contract for its construction was concluded in 2010. Rosatom built the plant, and nuclear fuel is to be supplied by the Russians. The investment will officially open at the end of April 2023.¹³

¹⁰ H.F. Büyük, "Turkey's Foreign Trade Deficit Spikes, Imports from Russia Double", *Balkan Insight*, 31.01.2023, <https://balkaninsight.com/2023/01/31/turkeys-foreign-trade-deficit-spikes-imports-from-russia-double> [accessed: 16.04.2023].

¹¹ J. Spicer, "U.S. sanctions Turkey-based entities it says helped Russia's war", *Reuters*, 12.04.2023, www.reuters.com/world/us-sanctions-turkey-based-entities-it-says-helped-russias-war-2023-04-12 [accessed: 16.04.2023].

¹² "Rusya Türkiye'ye uçuş yasağını 21 Haziran'a uzattı", *Deutsche Welle*, 1.06.2021, <https://p.dw.com/p/3uFud> [accessed: 12.04.2023].

¹³ K. Byzdra, "Putin z wizytą w Turcji? Ma otworzyć elektrownię budowaną przez Rosatom", *Energetyka24*, 1.04.2023, <https://energetyka24.com/gaz/wiadomosci/put>

Of course, relations with Russia are not only about economic cooperation. They are also about competition for influence in Syria, Libya, and the Caucasus. The Russian-Ukrainian war led to some relaxation in the Syrian war. Erdoğan, due to internal economic problems and public dissatisfaction with many migrants, is keen to expand the ‘security zone’ so that Syrians can be moved there. In the last year, when the Turkish side warned of the possibility of another offensive, Iran pressured Russia not to give way to Turkey, which showed unequivocally that it would not give way to Ankara in its sphere of influence.

Turkish-Ukrainian relations

However, when looking at the implications of the Russian-Ukrainian war, Turkish relations with Kyiv should not be overlooked. Trade turnover between Turkey and Ukraine in 2019 was USD 4.8 billion (USD 2.09 billion exports from Turkey, USD 2.72 billion imports from Ukraine). Turkish drones were already 2021 used during the Donbas War. Even under Russian aggression against Ukraine, on 3 February 2022, Erdoğan traveled to Kyiv for a meeting with President Volodymyr Zelenskiy. This visit was pre-planned and linked to the 30th anniversary of establishing diplomatic relations between Ukraine and Turkey. At that time, a free trade zone and a framework agreement on cooperation in high aerospace technology were signed in Kyiv. An agreement was also signed on establishing a drone factory and a training center for drone operators near Kyiv, jointly to produce Bayraktar Akinci heavy combat drones, with the Ukrainian side responsible for building the engines. It is worth noting that at the beginning of April 2023, the Bayraktar Akinci drone with Ukrainian motors passed tests. Cooperation in the defense sector is thus developing despite the ongoing war in Ukraine.

We must determine how many Bayraktar TB2s and other weapons Turkey has sold or transferred to Ukraine. This is hardly surprising, as it is sensitive data. There is mainly unofficial information provided by Foreign Policy that since November 2022, Ankara has been supplying Kyiv with Dual Purpose Improved Conventional Munition (DPICM), which Turkey produced with the US during the Cold War.¹⁴ In addition, there have been reports of

in-z-wizyta-w-turcji-ma-otworzyc-elektrownie-budowana-przez-rosatom [accessed: 16.04.2023].

¹⁴ Unofficially: “Turcja przekazuje Ukrainie amunicję kasetową”, *Rzeczpospolita*, 11.01.2023, www.rp.pl/konflikty-zbrojne/art37756721-nieoficjalnie-turcja-przekazuje-ukrainie-amunicje-kasetowa [accessed: 16.04.2023].

sales to Kyiv of Kirpi transport vehicles, helmets, and bulletproof vests. However, accurate and official figures must wait until the war ends.

Turkey is sending humanitarian aid to Ukraine. By August 2022, it was estimated at 98 trucks. It is also negotiating between the Ukrainian and Russian sides on the transfer of prisoners. It was to the territory of Turkey that the now legendary defenders of Azovstal were transported, where they were reunited with their families as, according to the agreement, they could not return to Ukraine. It is estimated that there are currently around 100,000 Ukrainian refugees in Turkey. Of course, this aid also brings concrete benefits to Ankara. On 18 August 2022 (a dozen days after the Turkish-Russian meeting in Sochi), President Erdoğan visited Lviv and met with his Ukrainian counterpart. The composition of the Turkish delegation was comprehensive, but the Turks returned to the country with separate agreements for the reconstruction of Ukrainian infrastructure after the war. A joint working group was also set up to attract Turkish companies and capital after the war.

Ukrainian-Turkish economic cooperation is crucial for Ankara (and Kyiv), even though there are claims that it is not a long-term cooperation for either side.¹⁵ However, observing how essential sectors it is, we could not be sure of heralding its temporary nature. Moreover, the Turkish market is open to economic cooperation; in March 2023, it was reported that it opened up to Ukrainian fish and seafood exports.

Big winner or big loser?

The importance of Turkey became apparent very soon after the war began. The subject of the Black Sea straits of the Bosphorus and the Dardanelles, over which Turkey has control under the Montreux Convention of 1936, resurfaced. This allowed it to close the passage to countries at war (but then it had to enable the return of the Black Sea fleet), or if it feared the threat of war, it could close it completely. Ankara chose the first option, which was predictable; otherwise, it would have suggested that it feared Moscow's aggression. However, this situation has shown that despite the development of the arms sector and the world since the Cold War, Turkey's geographical location still makes it an important ally.

¹⁵ I. Kusa, "From Ally to Mediator: How Russia's Invasion Has Changed Ukraine-Turkey Relations", *Carnegie Endowment for International Peace*, 7.10.2022, <https://carnegieendowment.org/politika/88097> [accessed: 16.04.2023].

President Erdoğan cared precisely about showing that Turkey was a regional power to be reckoned with and not to be ignored as an inferior ally. He did not care about cutting himself off from either side, as economic interests became paramount. Therefore, Turkey decided to use its balancing act to mediate between Russia and Ukraine. In doing so, it wanted, on the one hand, to gain international prominence, to show itself to be an essential member of NATO whose interests must be reckoned with, and, on the other hand, a peaceful resolution of the war and a return to the situation before it broke out would be in the interests of the Turkish economy.

The first meeting of foreign ministers took place on 10 March 2022 on the sidelines of the Antalya Diplomacy Forum.¹⁶ Negotiations in Istanbul occurred a few weeks later, on 29 March 2022. They did not yield significant results but showed that both sides considered Turkey, as a potential mediator. Turkey returned to this context a few months later when on 22 July, grain agreements were signed for 120 days (renewable) between Turkey, the UN, and Ukraine and Turkey, the UN, and Russia. Under these, it became possible to transport grain from Ukrainian ports across the Black Sea. This agreement was necessary for Ankara not only for prestige reasons – a mediator in such an important agreement, but also because by buying a significant part of the grain (at a discount), it could either sell it or give it to countries threatened by famine and thus increase its soft power. By March 2023, 23 million tonnes of grain had been exported under the agreement. Under the ‘Grain from Ukraine’ initiative, Kyiv is expected to send around 60 ships with Ukrainian grain to Africa by mid-2023. By March 2023, Ukraine had raised over \$200 million and sent 140,000 tonnes of Ukrainian grain to the poorest countries. This is undoubtedly a significant success for Turkish diplomacy, although there are also controversial reports of, among other things, Turkey buying Ukrainian grain looted by Russia.

Conclusion

The first year of the Russian-Ukrainian war has shown that Turkey primarily focuses on its interests. Huge economic problems, inflation reaching more than 80% officially and 180% unofficially, and the upcoming presidential and parliamentary elections in May 2023 have caused Turkish foreign policy to

¹⁶ K. Strachota, A. Michalski, “Ostrożność i wyczekiwanie. Turcja wobec wojny rosyjsko-ukraińskiej”, *Komentarz OSW*, 10.03.2022, www.osw.waw.pl/pl/publikacje/komentarze-osw/2022-03-10/ostrozosc-i-wyczekiwanie-turcja-wobec-wojny-rosyjsko [accessed: 6.04.2023].

change considerably. Relations with Saudi Arabia, the United Arab Emirates, and Egypt improved significantly. This turn in Turkish policy was geared towards increasing trade and gaining support from wealthy Gulf countries to reduce inflation. Turkey's attitude towards Russia and Ukraine was also geared towards satisfying its main economic objectives of increasing exports and pursuing major investment projects. Turkey sought to balance as long as possible without incurring costs.

Under the embargo of five Turkish banks by the US Treasury Department, they withdrew from using the Russian payment system 'Mir'.¹⁷ On 10 March 2023, Bloomberg news agency, citing a senior Turkish government official, confirmed that Ankara had halted the transit of EU- and US-sanctioned goods to Russia. This indicates that, on the one hand, Turkey continues to carry a propaganda message indicating independence from the US and pursuing an independent policy. Still, it must reckon with the US and Western countries when it comes to incurring costs or seeking assistance.

At this point, Turkey can be considered a winner in the Russian-Ukrainian war, as it manages to pursue a balancing policy using, especially economically, contact with both Kyiv and Moscow. However, Ankara cannot seek such a policy in the long term without incurring costs. As historical experience has shown, such indecisiveness will likely discourage all interested states once they no longer need Turkey.

Despite its efforts, it also seems to need help to mediate the peace talks. Although Turkey is safer and more neutral than Belarus, a mediator with a more robust international position than Turkey will be needed here. Despite the uncertainty about the consequences (negative or positive) of Turkey's foreign policy base, it can already be said that neutrality was what the Turks themselves expected of their leader. Unsurprisingly, much foreign policy is now conducted on domestic politics and the upcoming elections.

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¹⁷ M. Ciesielski, "Turcja beneficjentem wojny w Ukrainie", *Obserwator finansowy*, www.obserwatorfinansowy.pl/tematyka/makroekonomia/trendy-gospodarcze/turcja-beneficjentem-wojny-w-ukrainie [accessed: 25.03.2023].

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Abstract

More than a year after the Russian aggression against Ukraine, a little can already be said about Turkey's attitude and the consequences of the conflict for Ankara. Turkey is balancing between Moscow and Kiev, trying to gain ground as a mediator, but also looking after its interests, especially economic ones. The text aims to analyse Turkish-Russian and Turkish-Ukrainian relations, especially since the outbreak of the war, and to answer the question of what the possible consequences of the Russian-Ukrainian war are for Turkey, whether it will be the big winner or rather the big loser of the situation.

Key words: Turkey, Ukraine, Russia, war