

REPORT

Türkiye's Strategic Choices Amid America's Middle East Recalibration

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Executive Summary

The United States aims to reduce the costs of prolonged military engagements and state-building efforts in the Middle East while preserving its military superiority in the region and its capacity to intervene directly when necessary.

The 2025 National Security Strategy and the counterterrorism and arms transfer policies introduced in 2026 reflect Washington's efforts to shift a greater share of the security burden onto regional partners and strengthen American defence production. Containing Iran, ensuring Israel's security, keeping strategic maritime passages open and safeguarding energy flows remain central priorities of U.S. policy. Intensifying technological competition with China and the need to secure critical supply chains have also given regional partnerships a new significance. Under these circumstances, Washington increasingly assesses the strategic value of its partners through their military capabilities, defence production, intelligence resources and logistical infrastructure, alongside their diplomatic alignment. The emphasis on regional burden-sharing that gained prominence under Biden has continued under Trump, now guided by a stronger cost-benefit calculus and a more pronounced defence-industrial rationale.

Türkiye possesses considerable strategic capacity to capitalise on the opportunities arising from this transformation. Its expanding defence industry, NATO membership, military experience in Syria and Iraq, deepening partnerships with Gulf countries and transport networks connecting Europe and Asia have strengthened Ankara's regional position.

Nevertheless, Washington's political and military support for Israel has deepened the divergence between the two countries' security priorities in the Middle East. Israel's war on Gaza, its expansion of illegal settlements in the occupied Palestinian territories and military attacks undermining Syria's sovereignty directly affect Türkiye's regional security interests. Netanyahu's statements concerning the vision of Greater Israel, efforts to annex the West Bank and Israel's expansionist policies are placing increasing pressure on the region's political and territorial order. Washington's response to Israeli attacks, even as it supports the establishment of a stable Syrian state, exposes contradictions within American strategy.

For Türkiye, these developments constitute a strategic challenge that extends beyond Palestine to Syria's future, border security and the regional balance of power.

Syria is one of the clearest areas in which this divergence of interests has emerged. Steps toward dissolving the YPG and integrating the SDF structure into Syrian state institutions mark a new stage in establishing a unified, legitimate chain of command. For Türkiye, the decisive test is whether these measures are implemented in practice through the transfer of heavy weapons, border control, security institutions and detention facilities. Within the Terror-Free Türkiye process, verifiable disarmament must be accompanied by stronger social cohesion and measures to prevent provocations that conflate citizens of Kurdish origin with the PKK.

The PKK's dissolution may not eliminate illicit financing, narcotics-trafficking and smuggling networks previously linked to the organisation, as some could reorganise under new criminal structures, requiring sustained intelligence monitoring, financial investigations and cross-border law-enforcement cooperation.

Meanwhile, Israel's military activities in Syria complicate the rebuilding of state capacity and increase the risk of direct military confrontation with Türkiye. American military pressure on Iran

and disruptions to energy flows through the Strait of Hormuz have also raised the economic and security costs of instability in Türkiye's immediate neighbourhood. Against this backdrop, the Makkah Joint Defence Agreement and the R4 consultative framework offer new opportunities for sharing regional security responsibilities, while also creating obligations for Türkiye whose scope must be carefully defined.

Shifting regional dynamics have also increased the importance of Türkiye's geoeconomic opportunities. Crises in the Strait of Hormuz and the Red Sea have raised the strategic value of alternative routes such as Ceyhan, the Development Road and the Middle Corridor. Greater cooperation with Azerbaijan, Kazakhstan, Georgia and other partners on infrastructure, diplomacy and corridor security could strengthen this capacity. Safeguarding Türkiye–Azerbaijan relations against attempts to foment artificial tensions is essential to the corridor's political stability and economic security. The potential responses of regional actors, including Iran and Israel, to changing transit dynamics should be monitored through concrete developments and risk indicators.

Critical minerals add a new economic dimension to Türkiye's international position. Developing domestic separation, refining and advanced manufacturing capabilities based on the rare-earth potential of Beylikova/Eskisehir, in particular, could strengthen Türkiye's position in the technological competition between the United States and China. The strategic value of these resources will depend on the production and processing capabilities established within the country.

This paper proposes five complementary policy tracks for Türkiye in response to the changing U.S. strategy in the Middle East. Key priorities include verifying the ongoing security and integration process in Syria, ensuring that Terror-Free Türkiye strengthens social cohesion, and maintaining diplomatic opposition to Israel's occupation and expansionist policies. The responsibilities of the Makkah Joint Defence Agreement and the R4 consultative framework, together with the obligations they may create for Türkiye, should be clearly defined. Türkiye should strengthen institutional channels for negotiations with the United States on defence, trade, and technology. At the same time, Middle Corridor security and critical-mineral processing capabilities should be pursued within a common geoeconomic strategy. Opportunities arising from Trump–Erdoğan leader-level diplomacy should be translated into tangible gains on the F-35 programme, sanctions, Syria and economic cooperation. The durability of these gains should be secured through lasting relationships with Congress, the U.S. bureaucracy and multilateral institutions. Türkiye's strategic objective should be to strengthen its independence in decision-making through security, industrial and diplomatic capabilities that extend beyond the political preferences of any single administration.

Regional Transformation at a Glance

Development	What changed?	Why does it matter for Türkiye?
U.S. strategy	Burden-sharing has become a more explicit principle, while the option of coercive military intervention remains.	Creates greater scope for capable regional allies but preserves Washington's ability to escalate rapidly.
Terror-Free Türkiye	The parliamentary commission adopted its report in February, and Law No. 7595 entered into force in August 2026.	Links verified disarmament and security developments in Syria and Iraq to the domestic process, while highlighting the risk that illicit financial and smuggling networks may survive the organisation's dissolution.
Syria	The dissolution of the YPG and integration of the SDF structure into Syrian state institutions were announced; Ankara stressed on 19 September that implementation and the effective removal of the threat were decisive.	Moves the debate from declarations to verifiable integration of command, weapons, borders and institutions.
Greater Israel Project / Syria	Netanyahu's association with the vision of Greater Israel in 2025, E1 settlement expansion in the West Bank, and attacks on Syrian military infrastructure in 2026.	Connects the preservation of Palestinian statehood, Syria's territorial integrity and Turkish–Israeli deconfliction as questions of regional order.
Regional ownership	The Makkah Agreement creates a collective-defence mechanism, while R4 operates as a looser diplomatic consultation format.	Provides Ankara with two distinct regional layers that complement rather than replace NATO and bilateral relations with the United States.
Energy / connectivity	Oil flows through Hormuz fell from 21.6 million barrels a day in late 2025 to 4.9 million in Q2 2026; Iraq tested alternative exports through Ceyhan.	Increases Türkiye's strategic value as an energy, logistics and overland connectivity hub.
Critical minerals	In 2026, the United States prioritised domestic or allied sourcing of defence-critical materials; Beylikova has a pilot plant associated with an ore resource of 694 million tonnes containing 12.5 million tonnes of rare-earth oxides.	Could increase Türkiye's value through defence manufacturing and mineral-processing capabilities as well as strategic geography.
Gulf / Red Sea	Houthi attacks affected Bab el-Mandeb and Saudi security. Reports of military preparations and emergency consultations emerged on 2 October; the Makkah Agreement committee discussed collective-defence implementation on 5 October.	Turns the legal limits of collective solidarity, force contributions, mediation and escalation management into concrete decisions for Türkiye.
Israel	The 2016 memorandum covers $38 billion in assistance over 2019–2028; two Senate votes challenging arms sales in April 2026 attracted 40 and 36 supporters.	Makes the external conditions of Israeli military operations and the future terms of US support relevant to Türkiye's policy planning.

Introduction

A defining feature of the current Middle East balance of power is the reconfiguration of U.S. engagement. The Trump administration seeks to reduce the costs of long-term military and political commitments in the region while retaining the option to use high-intensity force when American interests are at stake. The 2025 National Security Strategy argues that growing U.S. energy production should reduce American dependence on the Middle East, while identifying Gulf energy supplies, freedom of navigation through the Strait of Hormuz and the Red Sea, counterterrorism and Israel's security as enduring interests (White House, 2025). The May 2026 counterterrorism approach and the February 2026 arms transfer strategy reinforce Washington's preference for transferring operational responsibilities to capable partners and supporting American defence production (White House, 2026).

Türkiye is a major NATO ally bordering Syria, Iraq and Iran, with extensive military operational experience and a defence industry whose capabilities have been tested in conflicts such as those in Ukraine and Karabakh. These attributes place Washington's burden-sharing policy at the centre of Ankara's agenda. Arms transfers, sanctions, maritime security, intelligence, energy, trade, and regional diplomacy are all areas where shared interests coexist with political disagreements.

The scale of economic relations between the two countries is equally important. According to Türkiye's Ministry of Trade, bilateral merchandise trade exceeded $38 billion in 2025, while the figure for 2026 was projected to reach $42–43 billion (Republic of Türkiye Ministry of Trade, 2026). The reported total, including services, stood at approximately $47 billion. On 22 September 2026, President Recep Tayyip Erdoğan reiterated the bilateral trade target of $100 billion, highlighting nuclear energy, LNG, civil aviation, advanced technology and the defence industry as areas of cooperation (Directorate of Communications, 2026). These figures also illustrate the gap between existing trade volumes and the political ambition to expand economic ties.

Shared interests, however, have not eliminated disagreements over the regional order. Türkiye regards the reconstruction of Syria as a unified and sovereign state, the complete dismantling of the PKK/YPG structure and an end to Israel's occupation of Palestinian territories as fundamental security objectives. Ankara calls for an end to the devastation and genocide caused by the war against Palestine. It supports the establishment of an independent Palestinian state based on the 1967 borders, with East Jerusalem as its capital (Republic of Türkiye Ministry of Foreign Affairs, 2026). Israel's repeated attacks on Syria and its occupation policies undermine the country's military and institutional reconstruction (Salhani, 2026). Washington, meanwhile, seeks to support a stable Syria while maintaining its strong commitment to Israel's security.

For Ankara, the challenge extends beyond deciding whether to move closer to Washington or distance itself from the United States. Türkiye must preserve its ability to act in accordance with its own security priorities while benefiting from its alliance relationships. The restoration of state authority in Syria, the prevention of direct military confrontation between Türkiye and Israel, Gulf security, the Terror-Free Türkiye process and industrial capacity are closely interconnected. Disagreements in one area should not obstruct cooperation in others.

What Is Changing in U.S. Middle East Strategy?

Three developments stand out in Washington's current approach. First, the United States is narrowing the political ambitions associated with its long-term regional interventions while retaining the capacity to use decisive military force when necessary. Strategic maritime passages, energy flows, counterterrorism and the capabilities of regional partners are assuming greater importance.

The Broader Middle East and North Africa Initiative of 2004 must be understood within the historical context of Washington's military interventions since 2001. While the Bush administration presented democratic reform as an instrument of regional security, its neoconservative foreign policy agenda pursued regime change and placed military power at the forefront (Girdner, 2005). Afghanistan was invaded in 2001 and Iraq in 2003, before the initiative was formally announced. Nevertheless, the language of political transformation also served to legitimise American interventions as part of a broader effort to



(Osmancan Gürdoğan - Anadolu Agency)

reshape the region. The programme had been developed with limited consultation with the very societies it sought to transform, raising questions about the credibility of its democratic promises from the outset (Carothers & Ottaway, 2004). Türkiye's invitation to the 2004 Sea Island G8 Summit as a 'democratic partner' also reflected the role Washington envisaged for Ankara in its broader regional plans (U.S. Department of State, 2004).

What has changed today is primarily the means through which Washington pursues its objectives. Containing Iran, ensuring Israel's security and protecting strategic passages remain important, but economic pressure, selective military operations, arms transfers and regional partnerships now play a greater role (White House, 2025). Türkiye's value to the United States has evolved accordingly. The earlier discourse of Türkiye as a 'model country' has given way to greater interest in its operational capabilities, domestic defence production, connectivity and access to strategic resources. American policy therefore shows continuity in its fundamental interests, even as the instruments used to pursue them have changed considerably (Yüksel, 2024).

The emerging American approach nevertheless contains a structural tension: Washington seeks to transfer more regional security responsibilities to its partners without relinquishing decisive influence over the regional security order. Burden-sharing does not necessarily entail a corresponding redistribution of strategic authority. Partners may be expected to provide military capabilities, assume operational risks and contribute financial resources while remaining dependent on American weapons systems, intelligence networks, technological infrastructure and political approval. For Türkiye, the distinction is consequential. Greater responsibility can strengthen Ankara's bargaining position, but it can also deepen dependence if the terms of cooperation leave little room for independent decision-making. The strategic question is therefore not simply how much responsibility Washington is willing to delegate, but how much operational and political discretion its partners can exercise in return.

This shift is also taking place at a time when Washington must divide its attention and resources across several strategic theatres. Competition with China over technology, industrial supply chains and influence in the Indo-Pacific is occupying an increasingly prominent place among American priorities. At the same time, Russia's threat to European security and recurring crises in the Middle East continue to demand resources (White House, 2025). Israel occupies a distinct position within this equation. Decades of military assistance, congressional support and defence-industrial interests have given the relationship an institutional weight that extends well beyond the preferences of any single president (U.S. Department of State, 2016). Israeli military operations and the regional responses they may provoke can draw Washington back into the very Middle Eastern crises from which it seeks to reduce its exposure. As the United States attempts to redirect its resources towards competition with China, the strategic cost of these commitments becomes increasingly apparent (Yüksel, 2025). Türkiye thus faces a Washington that increasingly relies on the military and logistical capabilities of its regional partners, yet still retains both the capacity for direct intervention and, at times, the political will to exercise it.

From Biden to Trump: Continuity and Recalibration

Dimension	Biden administration	Trump administration
Regional objectives	Avoid "grand designs"; prioritise stability, de-escalation and regional integration.	Narrowly defined core interests; avoidance of overextension and selective engagement focused on outcomes.
Partners' role	Enable partners to defend themselves; integrated air and maritime defence and coalitions.	Burden-sharing and burden-shifting; partners assume primary responsibility within their regions.
Arms transfers	Instrument supporting security partnerships and interoperability.	Also, an instrument of U.S. reindustrialisation, defence output and critical supply chains.
Iran	Diplomacy to prevent a nuclear weapon, with other instruments if diplomacy fails.	More intensive coercive pressure and military leverage while retaining channels for negotiation.
Israel / Palestine	Strong commitment to Israel's security alongside emphasis on a viable two-state solution based on the 1967 lines.	Greater emphasis on Israeli security, peace arrangements in Gaza and Arab–Israeli regional integration.
Geoeconomics	Energy security, partner capacity and regional economic ties.	Defence industry, critical materials, AI and nuclear technology, supply chains and commercial reciprocity assume greater prominence.

Trump has made this recalibration more explicit, although the shift began before his return to office. The Biden administration's 2022 National Security Strategy had already emphasised practical measures over ambitious projects of regional transformation, prioritising regional partners' defence capabilities, integrated air and maritime security, freedom of navigation, and diplomacy aimed at reducing tensions (White House, 2022). Under Trump, however, the cost of security commitments has become a more decisive consideration. Regional partners are expected to assume greater responsibility, while arms transfers are increasingly tied to American industrial policy (White House, 2026).

For Türkiye, this distinction has implications that extend beyond the current presidency. Washington's growing reliance on regional partners may continue under future administrations. In contrast, pressure on Iran, conditions attached to arms sales, the priority given to Palestinian statehood, and the importance of personal diplomacy are more susceptible to changes in the White House.

Second, burden-sharing is increasingly shaping Washington's operational decisions. The February 2026 arms transfer order prioritises partners that invest in their own defence and occupy strategically important regions. The counterterrorism strategy similarly envisages transferring operations to capable partners while maintaining pressure until that transition takes place (White House, 2026). Countries with military capabilities, intelligence access, industrial depth and strategic geographical positions have consequently become more valuable to Washington. Türkiye possesses many of these attributes. In September 2026, the U.S. State Department approved a possible $24.3 billion sale of 48 F-35 fighter jets to Saudi Arabia, subject to congressional review. The proposed sale shows how Washington is using arms transfers to strengthen regional partners' capabilities and reinforce American deterrence (AFP, 2026).

Third, shifting routine security responsibilities to regional partners has not diminished Washington's willingness to use military force. Iran illustrates this tension particularly clearly. The 2026 Counterterrorism Strategy identifies Tehran as the principal regional threat to the United States and retains direct military operations, intelligence and cyber capabilities among the instruments available to Washington (White House, 2026). Yet on 22 September, Trump stated that talks with Iran were continuing and that an agreement remained possible (Reuters, 2026). Negotiation and coercive military pressure therefore operate as complementary elements of the same policy. Israeli attacks, regional retaliation and renewed threats to American forces

could generate pressure for Washington to expand its security commitments once again, complicating its efforts to redirect resources towards competition with China (Yüksel, 2025).

The economic consequences of this instability further strengthen Türkiye's interest in de-escalation. Data from the U.S. Energy Information Administration (EIA) show that flows of crude oil and petroleum liquids through the Strait of Hormuz fell from 21.6 million barrels per day in the fourth quarter of 2025 to 4.9 million barrels per day in the second quarter of 2026. This disruption has prompted producers and importers to seek alternative routes, increasing the importance of the Red Sea, the Mediterranean and overland transport infrastructure (EIA, 2026). For Türkiye, the implications go well beyond conventional energy-security concerns. The disruption has enhanced the strategic value of Ceyhan, the Iraq–Türkiye corridor and wider projects designed to diversify trade and energy flows away from vulnerable maritime chokepoints.

Türkiye's Strategic Position: Alliance, Autonomy and Regional Ownership

Türkiye continues to regard NATO deterrence as an important component of its national security. At the same time, it has faced occasional double standards within the Alliance and restrictions on defence procurement. Ankara has responded by investing in domestic production, diversifying its partnerships, and developing regional security arrangements (Yüksel, 2026).

The industrial foundations of this autonomy have expanded considerably. According to official Turkish figures, defence and aerospace exports exceeded $10 billion in 2025. SAHA 2026 brought together 1,763 companies and saw the signing of 182 agreements with a reported total value of $8 billion, of which $6 billion was export-oriented (Directorate of Communications, 2026). These figures matter because domestic defence production serves three distinct policy objectives. It strengthens national resilience against foreign procurement restrictions, contributes to deterrence within NATO and enables Türkiye to develop bilateral and regional security partnerships beyond traditional Western supply channels.

The expansion of Türkiye's defence capabilities has also become an important factor in its negotiations with Washington, where political progress on certain issues has yet to remove the remaining legal obstacles. On 24 June 2026, Vice President JD Vance stated that the administration was examining how a potential F-35 sale to Türkiye could be brought into compliance with U.S. law (Reuters, 2026s). President Trump later announced on 7 July that sanctions would be lifted and that he would decide whether to sell F-35 aircraft to Türkiye. Nevertheless, neither a completed sale nor Türkiye's formal return to the programme had been established (Al Jazeera, 2026). Turning presidential willingness into an implemented decision will require further engagement with Congress, the relevant sanctions legislation, and the programme's technical requirements.

Direct communication between Trump and Erdoğan could help revive difficult negotiations on defence, Syria and trade. Yet an understanding between the two presidents alone cannot resolve the F-35, S-400 or CAATSA disputes. Ankara should therefore make use of the current political momentum while maintaining close engagement with the American institutions responsible for turning diplomatic agreements into lasting outcomes (Yüksel, 2025).

The S-400 dispute brings together Türkiye's genuine air and missile defence requirements and the technical and legal restrictions associated with the F-35 programme and CAATSA. The system's future can be addressed through negotiations, but protecting Turkish airspace cannot depend on a single foreign supplier or the outcome of one procurement dispute. Indigenous capabilities, including SİPER, Steel Dome, radar networks, early-warning systems, electronic warfare and command-and-control infrastructure, should be developed as part of an integrated, layered national defence architecture. This process must also take account of the operational requirements of the Turkish Air Force and interoperability with NATO (Congressional Research Service, 2026; Presidency of Defence Industries, n.d.).

Indeed, prolonged restrictions on defence procurement have already encouraged Ankara to seek alternative suppliers, expand domestic manufacturing, and diversify its technological capabilities. Strategic autonomy is consequently becoming a lasting institutional and industrial transformation, accelerated in part by external constraints. When assessing the immediate pressure that sanctions place on Türkiye, Washington must also consider how these measures could strengthen Ankara's procurement independence over the medium term (Yüksel, 2025).

Beyond the procurement disputes, the expansion of U.S. military access in the Eastern Mediterranean and the Aegean has broadened Washington's operational options. Souda Bay in Crete hosts an established American naval operations and logistics facility. At the same time, the port of Alexandroupolis serves as a transit point for deploying U.S. forces into Europe. The growing availability of alternative routes and deployment locations matters to Ankara because it affects the military balance, the distribution of logistical responsibilities and the political room for manoeuvre among NATO allies. Türkiye should seek greater transparency and mutual consultation concerning allied military activities in the region while continuing to strengthen its own deterrence capabilities and transport infrastructure (U.S. Navy, n.d.; U.S. Army, 2024).

Israel's diplomatic pressure on Türkiye's position within NATO adds another layer to this picture. In July 2024, then Israeli Foreign Minister Israel Katz called on NATO members to expel Türkiye from the Alliance. Because the North Atlantic Treaty contains no explicit procedure for expelling a member against its will, the call amounted to an attempt to exert political pressure rather than initiate an established membership process (Reuters, 2024; North Atlantic Treaty Organisation, 1949). Türkiye can respond by strengthening its contribution to allied security and sustaining its relationships with NATO institutions and the American defence establishment.

A different form of political pressure emerged in Washington through the Turkey Diplomatic Realignment Act of 2025. Introduced as H.R. 1890, the bill proposed transferring responsibility for Türkiye within the U.S. Department of State from the Bureau of European and Eurasian Affairs to the Bureau of Near Eastern Affairs. The legislation was referred to the House Foreign Affairs Committee but did not result in an implemented administrative change (U.S. House of Representatives, 2025). Its political significance nevertheless remains clear. While the president may seek closer cooperation with Ankara, certain members of Congress can pursue initiatives to redefine Türkiye's place within American foreign policy institutions. This makes lasting engagement with Congress and executive agencies just as important as direct access to the White House.

Alongside these developments in its relations with Western allies, Türkiye has been expanding the institutional foundations of regional security cooperation. The Makkah Joint Defence Agreement, signed by Türkiye, Pakistan and Saudi Arabia on 7 August 2026, has strengthened the institutional dimension of regional ownership (Fraser & Ahmed, 2026). Its collective-defence commitment, political and military committee, and Riyadh-based secretariat underline the arrangement's defensive character. The R4 format, which also includes Egypt, provides a separate platform for diplomatic consultations on Palestine, Iran, regional tensions and maritime security. On 5 October 2026, the Makkah Agreement committee met in Riyadh, adopted decisions concerning the practical implementation of collective-defence commitments and appointed its first secretary-general. On 12 October, it was announced that Türkiye would submit the agreement to the Grand National Assembly for approval. These developments highlight the importance of coordinating institutional decisions with the ratification procedures required under national law (Directorate of Communications, 2026; MFA Türkiye, 2026; Reuters, 2026).

Taken together, these arrangements demonstrate that Türkiye's pursuit of strategic autonomy should not be understood as isolation from alliances. In operational terms, strategic autonomy is better defined as the capacity to maintain alternative diplomatic channels, suppliers, partners and policy instruments when national interests do not fully coincide with those of allies. The central policy challenge is to ensure that these different layers of cooperation reinforce one another rather than create conflicting commitments.

Türkiye's approach to strategic autonomy increasingly reflects a deliberate effort to expand its regional influence while avoiding strategic overextension. Its growing military capabilities and diversified partnerships have strengthened Ankara's ability to shape regional security arrangements without compromising its freedom of action. The Makkah Joint Defence Agreement illustrates this approach. Rather than establishing an automatic mechanism for military intervention, the agreement offers a flexible framework for political consultation, differentiated contributions and calibrated deterrence, allowing participating states to determine the nature and extent of their involvement in accordance with their respective strategic priorities. This emphasis on flexibility enables Türkiye to contribute to collective security while retaining control over its military commitments and maintaining diplomatic channels with competing regional actors. More broadly, Ankara's strategy reflects an understanding that effective regional leadership depends not on assuming ever-expanding responsibilities, but on balancing solidarity with strategic discretion. The strength of Türkiye's emerging security architecture lies precisely in its capacity to combine credible deterrence with diplomatic flexibility, thereby expanding its strategic options without becoming entangled in conflicts beyond its immediate priorities.



(Osmancan Gürdoğan - Anadolu Agency)

Terror-Free Türkiye and the Syria–Iraq Security Continuum

No assessment of Türkiye's policy options in the Middle East in 2026 can treat the Terror-Free Türkiye process as purely domestic. The government's stated objective is increasingly being linked to the concept of a 'Terror-Free Region', reflecting the cross-border nature of the PKK terrorist organisation's activities and Ankara's position that lasting disarmament must also encompass organisational structures and armed capabilities beyond Türkiye's borders. The process has also acquired a more formal parliamentary and legal framework.

The National Solidarity, Brotherhood and Democracy Commission began its work in August 2025 with a mandate that brought together the objective of removing terrorism from Türkiye's agenda with efforts to strengthen social cohesion, national unity, democracy and the rule of law. Its final report was adopted on 18 February 2026 by 47 votes in favour, two against and one abstention. In August, the Grand National Assembly of Türkiye passed the Law on Strengthening National Solidarity and Social Cohesion with broad cross-party support. Speaker of Parliament Numan Kurtulmuş described the mechanism as a temporary and specific legal framework tied to the dissolution of the PKK/KCK, rather than a general amnesty. He also emphasised that its implementation would depend on verified disarmament and the termination of organisational ties (TBMM, 2026).

This legal framework changes Türkiye's regional security calculations in two important ways. First, developments in Iraq and Syria become more directly relevant to the credibility of progress achieved at home. If armed structures, command relationships, financing networks or territorial control persist across the borders, Ankara is likely to regard domestic gains as incomplete. Second, successful disarmament could create opportunities to redirect some state capacity from sustained counterterrorism operations towards reconstruction, cross-border trade, infrastructure development and political normalisation. How these two possibilities unfold will depend largely on developments in Syria.

Yet the success of Terror-Free Türkiye cannot be measured through disarmament alone. Any rhetoric that conflates citizens of Kurdish origin with the PKK terrorist organisation risks eroding a distinction Türkiye has maintained for

years and undermining the objective of social cohesion. As President Erdoğan emphasised in October 2026, Türkiye's security concerns are defined by terrorism, violence and threats to national security, not ethnic identity. For the process to gain acceptance across broader sections of society, the political, cultural and social belonging of citizens of Kurdish origin must remain separate from counterterrorism debates (Directorate of Communications, 2026).

Remaining organisational networks seeking to undermine Terror-Free Türkiye, provocative incidents and polarising social media campaigns could encourage perceptions that equate Turkish citizens of Kurdish descent with the PKK terrorist organisation. Addressing this risk requires inclusive language from public institutions, effective channels of local representation, equal treatment under the law and regular public communication on the disarmament process. Türkiye's lasting achievement would be strengthened national unity through the end of terrorism.

Disarmament also raises a less visible security challenge: the possible survival of illicit financial and logistical networks previously associated with the PKK. The US Treasury has documented the organisation's involvement in narcotics trafficking as a source of financing. Such networks may not disappear with the dissolution of the armed organisation; they could fragment, operate independently or become embedded in wider criminal markets, including smuggling and money laundering. Türkiye should therefore complement disarmament verification with financial intelligence, criminal investigations and cross-border law-enforcement cooperation, while monitoring emerging risks associated with migrant smuggling and human trafficking.

Progress in Syria is equally important to this process. Political and institutional steps towards the dissolution of the PYD/YPG/SDF terrorist structure and its integration into Syrian state institutions mark a new stage in a long-standing security dispute (AP, 2026). Türkiye's priority is to ensure that the announced arrangements are implemented on the ground through the transfer of heavy weapons, the establishment of a central chain of command, effective border security and functioning public institutions. As Foreign Minister Hakan Fidan emphasised in September, the decisive questions are whether the threat is eliminated in practice and Syria's territorial integrity is preserved. This approach should advance alongside Syrian Kurds' participation in political and social life based on equal citizenship (MFA Türkiye, 2026).

The success of integration will depend more on the actual transfer of security authority than on changes in organisational names or structures. Heavy weapons, border control, the administration of detention facilities and the continuity of local public services are the principal indicators. If Washington's security partnership with the SDF terrorist organisation, previously justified through the fight against Daesh, continues within Syria's new state structure, it could perpetuate distrust in U.S.–Türkiye relations. An orderly and verifiable transfer of security responsibilities to legitimate Syrian institutions would therefore serve both Türkiye's border security and Syria's sovereignty (MFA Türkiye, 2026, TRT World, 2025).

Ankara's insistence on verifiable integration stems from its security experience over the past decade. In October 2023, U.S. F-16 aircraft shot down a Turkish unmanned combat aerial vehicle near Hasakah, demonstrating how two NATO allies working with different security partners in Syria could become involved in direct military friction. The Pentagon stated that there were no indications that Turkish forces had deliberately targeted American troops. The incident nevertheless highlighted why command structures, weapons and border control must ultimately be consolidated under a single state authority (U.S. Department of Defence, 2023; CENTCOM, 2024).

Iraq, alongside Syria, remains central to Türkiye's cross-border security calculations. Ankara links the Terror-Free Türkiye process to the cessation of the PKK's armed activities on Iraqi territory while expanding cooperation with Baghdad and Erbil in energy, trade, water management and transportation. The Development Road and the Ceyhan pipeline offer concrete opportunities to deepen economic interdependence as border security improves. In this way, the objective of a Terror-Free Region brings disarmament, infrastructure security and cross-border development together within a shared policy agenda.



(Bakr Al Kasem - Anadolu Agency)

Syria as the Principal Test of the Emerging Regional Order

The Greater Israel Project has emerged as a central political concept for understanding the foundations of Israel's occupation, annexation and expansionist policies. The discourse surrounding the Promised Land, the objectives of religious-nationalist movements, the expansion of settlements in occupied territories and the use of military force to alter borders are closely interconnected issues with significant implications for regional security. Within the United States, political support for Israel has been shaped not only by the strategic partnership between the two countries but also by Evangelical electoral networks and organised lobbying activities. Although the influence of these factors varies across policy areas, they help explain the political resistance surrounding the occupation of Palestinian territories, the status of East Jerusalem and military activities around the Golan Heights (Yüksel, 2024).

Netanyahu's declaration of his commitment to the vision of Greater Israel in August 2025, which prompted reactions from regional countries, particularly Jordan, demonstrated that the issue extends beyond an abstract historical debate (Times of Israel, 2025). President Erdoğan has described Israel's annexation policies in the West Bank and its efforts to depopulate Gaza as components of the Greater Israel Project (Directorate of Communications, 2025). For Türkiye, the central concern is how Israel's expansionist ideology translates into occupation, settlement expansion and military attacks against neighbouring states. Syria represents the most critical point of contact between this project and Türkiye's security interests.

Syria is where Türkiye's core security objectives, Washington's burden-sharing approach, Israel's security doctrine, and regional reconstruction intersect most directly. Tür-

kiye supports Syria's sovereignty and territorial integrity, the integration of armed forces under the central government, counterterrorism, reconstruction and the voluntary return of displaced Syrians. These objectives can reinforce one another only if the Syrian state succeeds in building credible institutions without reproducing the exclusionary practices that fuelled conflict in the past. The Syrian government has already taken significant steps towards political and institutional normalisation.

Türkiye has also welcomed the closure of Syria's nuclear file at the International Atomic Energy Agency and U.S. decisions aimed at reducing the country's international isolation. The challenge now is to translate the announced arrangements into functioning state institutions that can maintain public security, support reconstruction and investment, and advance security-sector reform (MFA Türkiye, 2026).

Syria's stability and migration are particularly important to Türkiye. In April, Turkish authorities reported that approximately 650.000 Syrians had returned to Türkiye since the fall of the Assad government. These figures require careful interpretation, as conditions vary across provinces and voluntary return depends on housing, employment, public services and security. Nevertheless, the scale of these returns shows why Ankara has a direct interest in building a functioning Syrian economy rather than maintaining a fragmented security landscape (Anadolu Agency, 2026).

A more effective transfer of security responsibilities to Syria's legitimate state institutions could also bring Washington's burden-sharing approach closer to Türkiye's security interests. Border control, intelligence, the administration of detention facilities and public services form the practical foundations of this transition.

Daesh/ISIS has lost its former territorial control and conventional military strength, but scattered cells and networks linked to detention facilities could still exploit security gaps during the transition. The resurgence of such groups could provide new justifications for maintaining separate armed formations and extending foreign military deployments. Israel's military attacks and its contacts with local groups in southern Syria, in particular, require Ankara to assess how external actors might exploit tensions between communities. Israel may seek to extend its influence through certain local networks in an effort to limit the consolidation of a unified Syrian security authority. New armed formations emerging around radical Islamist narratives could likewise exert pressure on the government in Damascus while providing further justification for a continued foreign military presence. These dynamics could affect Türkiye's security even without a direct military confrontation between Türkiye and Israel. Ankara should therefore support the development of Syrian state capacity while closely monitoring the financing, weapons supplies and foreign connections of militant networks that may emerge.

Syria Stress Test: Indicators for Implementation

Indicator	What to monitor	Why it matters for Türkiye
Command structure	A single, verifiable national chain of command and the dissolution of parallel armed formations.	Shows whether integration is substantive rather than symbolic.
Weapons and borders	Transfer of heavy weapons, border control and critical security facilities to legitimate state authority.	Directly affects Turkish assessments of cross-border threats and Syrian sovereignty.
Residual Daesh/ ISIS threat	Syrian institutions assume responsibility for detention facilities, intelligence and monitoring of cells during transition.	Limits exploitation of security gaps by residual networks without justifying parallel armed structures.
Citizenship and governance	Equal citizenship in a unified state, protection of identity and functioning local administration.	Links security consolidation to political legitimacy and lasting stability.

Iran, Strategic Chokepoints and Türkiye's Interest in De-escalation

Türkiye and Iran have historically pursued divergent interests on numerous regional issues. Nevertheless, Ankara has a strong interest in preventing the collapse of state authority or uncontrolled military escalation along its eastern border. This position is consistent with Türkiye's broader commitment to protecting the sovereignty and territorial integrity of neighbouring states. The U.S. war against Iran has demonstrated the importance of this interest, with consequences extending to energy prices, trade routes, migration flows and security across Iraq, the Gulf and the Caucasus.

The scale of the resulting energy shock provides a measurable indication of the wider disruption. According to estimates by the U.S. Energy Information Administration (EIA), total petroleum flows through the Strait of Hormuz fell from 21.6 million barrels per day in the fourth quarter of 2025 to 14.9 million in the first quarter of 2026 and 4.9 million in the second quarter. The disruption demonstrated how quickly interruptions to maritime trade can increase the value of alternative routes, bringing Türkiye's interests in energy diversification, overland connectivity and regional de-escalation into sharper focus (EIA, 2026; Reuters, 2026).

Against this backdrop, Turkish diplomacy has generally emphasised negotiation and regional ownership. In June, the R4 statement welcomed the U.S.–Iran Islamabad Memorandum of Understanding as a step towards de-escalation, explicitly linking the conflict to risks facing energy markets, maritime routes, supply chains and international trade. On 22 September, the R4 foreign ministers reaffirmed Saudi Arabia's right to self-defence against Houthi attacks while reiterating the importance of dialogue and diplomacy. This emphasis on both the sovereign right to defence and diplomatic de-escalation is significant because it treats deterrence and negotiation as complementary instruments rather than mutually exclusive alternatives (MFA Türkiye, 2026).

For Ankara, the most challenging scenario would involve mounting pressure on several fronts simultaneously: renewed escalation between the United States and Iran, Houthi threats to Red Sea shipping routes, instability in Iraq and rising Turkish–Israeli tensions in Syria. Such a combination would restrict Türkiye's strategic room for manoeuvre and increase its economic costs. Conversely, stronger regional maritime security, supported by a negotiated framework between Washington and Tehran, could allow Ankara to devote more political capital to consolidating the Syrian state, connectivity with Iraq, and economic diplomacy.

Gulf Security and the Rise of Regional Ownership

The Makkah Joint Defence Agreement represents one of the most significant recent developments in Türkiye's regional position, moving cooperation with Saudi Arabia and Pakistan beyond individual defence arrangements toward a framework of collective defence. Under the agreement, an armed attack against one party is considered an attack against all three. This commitment has been followed by institutional measures, including the establishment of a Strategic Political and Defence Committee and a Saudi-based secretariat. Turkish official statements emphasise collective deterrence, defence-industrial cooperation and interoperability, while making clear that the agreement does not target any third country or seek to replace NATO or Türkiye's existing international commitments (Directorate of Communications, 2026).

The R4 format, bringing together Türkiye, Egypt, Pakistan and Saudi Arabia, provides a broader platform for diplomatic consultation. Its June 2026 statement addressed de-escalation with Iran, Palestine, energy markets, maritime routes and international trade. While the Makkah Agreement is intended to establish defence commitments and develop operational capabilities, R4 provides a diplomatic framework in which participating countries can maintain dialogue despite differences in their positions. Preserving this distinction will help make Türkiye's region-

al diplomacy and military engagements more predictable (MFA Türkiye, 2026).

The escalation of Houthi attacks in late September quickly brought the Makkah Agreement's practical implementation to the forefront. Meeting in Riyadh on 5 October, the Strategic Political and Defence Committee adopted decisions on implementing collective-defence commitments, force readiness, and institutional coordination. The announcement on 12 October that the agreement would be submitted to the Turkish parliament also highlighted the need to align foreign-policy decisions with domestic legal approval procedures. Ankara should continue to provide defence and technical assistance within a clearly defined mandate that keeps the risk of military escalation under control (MFA Türkiye, 2026).

The initial implementation of the Makkah Agreement will test the circumstances under which collective solidarity translates into military engagement and how far such commitments may extend. Responding to an attack against a member, securing international shipping routes, and pursuing mediation can occur simultaneously, but each requires distinct legal authorisation and operational decisions. Türkiye should therefore support maritime security and collective defence while clearly establishing the conditions under which it would participate in offensive operations and maintaining diplomatic channels for de-escalation.

The consolidation of these arrangements faces two potential obstacles: differing perceptions of regional threats and overlapping institutional responsibilities. Türkiye, Saudi Arabia, Pakistan and Egypt share interests in preventing uncontrolled escalation, protecting freedom of navigation and strengthening state sovereignty. Their strategic perspectives, however, do not necessarily coincide on every regional dispute. A collective-defence mechanism can function effectively when its activation rules, command arrangements and scope are clearly established. Similarly, a consultation framework becomes valuable when it can bridge differences without disregarding them. The central question is whether these two levels of cooperation can reduce coordination difficulties during crises or instead create uncertainty over the distribution of responsibilities.

Institutional design is therefore a central consideration for Türkiye. A regional security arrangement with a transparent mandate, compatible with NATO obligations and supported by practical capabilities, could strengthen resilience and defence-industrial cooperation. Conversely, ambiguous commitments, overlapping chains of responsibility or arrangements that encourage perceptions of competing blocs could restrict Ankara's room for manoeuvre. Regional ownership will strengthen Türkiye's strategic autonomy only if it creates clearly defined institutions that avoid new dependencies or increased risk of unintended military escalation.



(Mustafa Hatipoğlu - Anadolu Agency)

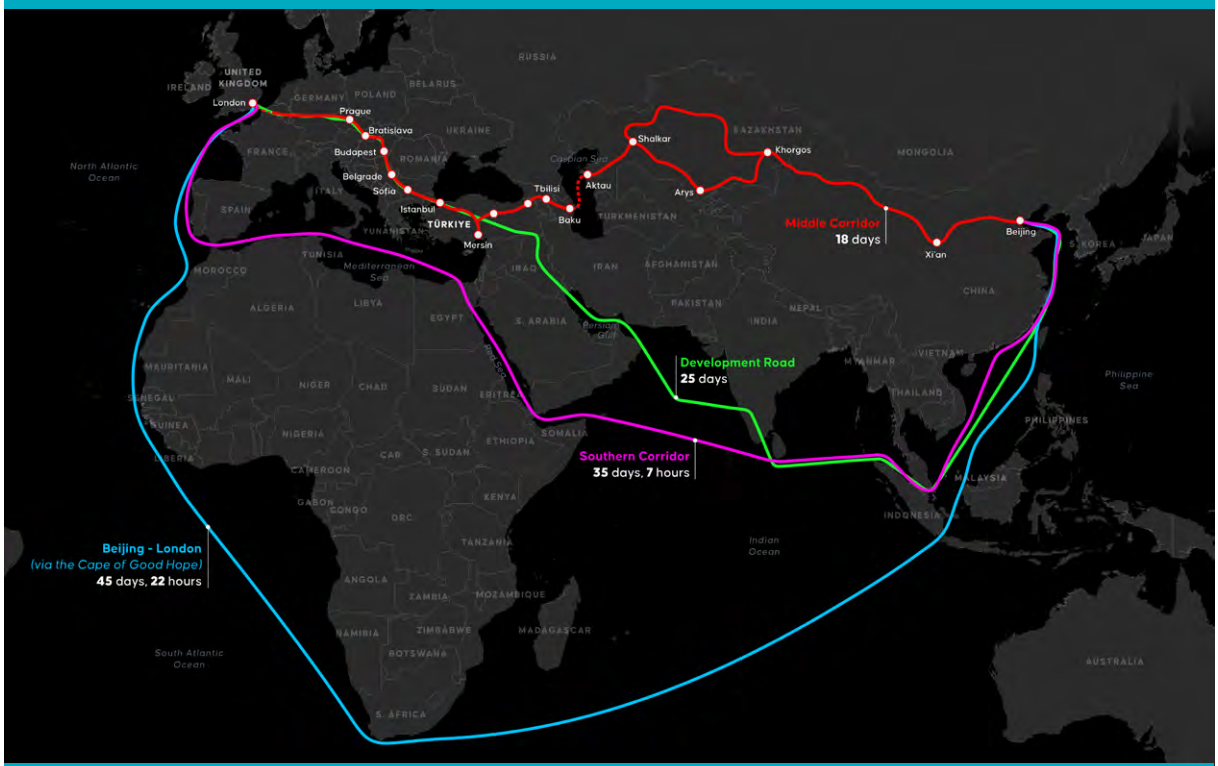
Connectivity and Economic State Capacity

Security arrangements alone cannot stabilise Türkiye's neighbourhood. Ankara's comparative advantage also lies in its geography, which lets it connect Gulf and Iraqi trade routes to Europe, provide export infrastructure through the Mediterranean, and link reconstruction markets with Turkish industry. The conflict with Iran has brought this economic dimension into sharper strategic focus. When flows through the Strait of Hormuz are disrupted, reliable alternative routes become increasingly valuable.

Iraq's pilot operation in September, which involved transporting crude oil from the south to the north by tanker trucks, illustrates this point. During a two-day trial aimed at increasing exports through Ceyhan, 209 tanker trucks carried more than six million litres of oil, approximately 38,000 barrels, from southern oilfields towards Kirkuk. Existing flows through Ceyhan were reported at around 200,000 barrels per day, below pre-conflict levels but strategically significant as Baghdad sought alternatives to its dependence on maritime exports from the south (Reuters, 2026). Although the trial involved relatively modest volumes, its strategic implications were considerable. Infrastructure once regarded as secondary can become a key source of resilience when maritime chokepoints are disrupted.

The Development Road offers Türkiye and Iraq an opportunity to reinforce security cooperation through greater economic interdependence. The route could expand production and trade in border regions, connect Gulf goods to Turkish ports and railways, and contribute to Iraq's economic stability. Its success will depend on financing, customs coordination, physical security and commercial compatibility with other transport corridors. Ankara should therefore approach the project as a long-term investment in state capacity.

Trade Corridors in Euroasia



(Mustafa Hatipoğlu - Anadolu Agency)

The Middle Corridor forms the principal east–west axis of Türkiye's connectivity strategy. This multimodal route, in which Kazakhstan and Azerbaijan play central roles, extends to Europe through the Caspian Sea, the South Caucasus and Türkiye. A 2023 World Bank study estimated that transport volumes could triple by 2030 with appropriate investment and administrative reforms. A more comprehensive assessment published in September 2026 suggested that trade volumes could more than triple by 2040, journey times could be halved, and millions of new jobs could be created across the region. Achieving these projections will require coordinated investment in ports, railways, customs procedures and digital data systems (World Bank, 2023; World Bank, 2026). The Middle Corridor and the Development Road should therefore be understood as complementary components of Türkiye's broader connectivity strategy.

Azerbaijan and Kazakhstan occupy pivotal positions along the Middle Corridor and remain important partners in Türkiye's engagement with the Turkic world. At the same time, Baku's energy and defence cooperation with Israel, Astana's engagement with the Abraham Accords process, and Iran's position on regional transit routes illustrate the increasingly complex interplay of diplomatic and economic partnerships across the region. These diverse relationships need not detract from Türkiye's longstanding ties with Azerbaijan or its growing cooperation with Kazakhstan. Rather, Ankara should continue strengthening mutual trust and advancing shared interests with Baku and Astana through deeper cooperation in trade, strategic infrastructure and transport security (Republic of Kazakhstan Ministry of Foreign Affairs, 2025).

As the Middle Corridor develops, it will alter the distribution of transit opportunities, commercial revenues and regional bargaining power. This could encourage regional actors, including Iran and Israel, to seek greater diplomatic or technological influence over countries along the route. Their different foreign partnerships could also be exploited to amplify artificial disagreements, particularly in Türkiye–Azerbaijan relations, which are crucial to the corridor's political resilience. To counter such pressures, Ankara should strengthen continuous political dialogue with Baku and Astana while developing coordinated public communication, port security, railway connections, customs data-sharing and cooperation against cyber threats. The Organisation of Turkic States can provide a framework for political coordination, while arrangements that also include Georgia should help secure the entire physical route (Organisation of Turkic States, 2026; World Bank, 2026).

Joint risk assessments, cyber exercises, alternative freight plans, mutually verifiable data-sharing and direct diplomatic communication channels during crises would give this cooperation a more practical foundation.

Critical Minerals, Rare Earth Elements and Geoeconomic Strategic Value

The emerging U.S. strategy towards the Middle East and its allies extends beyond military burden-sharing. A presidential executive order issued in July 2026 established a policy of sourcing critical materials used in defence systems from the United States or allied countries. Ten days later, a determination under the Defence Production Act identified shortages of critical minerals and materials as a direct risk to national defence and security. Rare earth elements, battery minerals and inputs for permanent magnets have consequently become part of alliance politics, extending their importance beyond their commercial value (White House, 2026).

This shift reflects the growing concentration of global supply chains. According to the U.S. Geological Survey, China controlled approximately 71 per cent of global rare-earth mining and 87 per cent of processing capacity in 2024. The International Energy Agency (IEA) estimates that China accounted for 91 per cent of refining capacity for magnet rare earth elements and 94 per cent of sintered permanent-magnet production that year. Such concentration has made Washington's efforts to develop alternative sources of supply, separation, refining and magnet-production capabilities among allies and partners a strategic priority (USGS, 2026; IEA, 2026).

Against this backdrop, Beylikova's strategic potential will depend on how much of the production chain Türkiye can develop domestically. According to the Ministry of Energy and Natural Resources, the 694-million-tonne ore resource in Eskisehir contains thorium, barite, fluorite and bastnäsite, including approximately 12.5 million tonnes of rare-earth oxides. The Ministry has also announced a pilot plant to develop recovery technology. Building domestic

capabilities in separation, purification, metallurgy, alloy production and permanent-magnet manufacturing will be essential to turning this resource potential into industrial strength. A model centred on raw-material exports could deepen technological dependence, whereas developing processing capacity within Türkiye would bring the defence industry and critical-mineral policy together under a shared production strategy (Republic of Türkiye Ministry of Energy and Natural Resources, 2026).

Beylikova could also give Türkiye new negotiating leverage in its industrial and security relations with the United States and Europe. As Washington seeks alternative supplies of critical minerals and additional processing capacity, Ankara can negotiate technology transfer, financing, environmental safeguards and conditions that support higher value-added production. These opportunities could be discussed within the broader strategic agenda, including the F-35 programme and CAATSA. However, the different legal procedures involved mean that no automatic trade-off can be assumed. Realistic planning must also distinguish between the size of an ore resource, economically recoverable reserves and the capacity to process minerals on a commercial scale (Republic of Türkiye Ministry of Energy and Natural Resources, 2026).

The diplomatic value of Beylikova/Eskisehir will therefore depend on its contribution to domestic production rather than the transfer of raw materials or mining licences to foreign partners. Technology licensing, separation and magnet-production facilities located in Türkiye, the development of domestic suppliers, intellectual-property arrangements and access to export markets can all be incorporated into partnership agreements. By diversifying its investors while maintaining public oversight, environmental safeguards and national decision-making authority, Türkiye can negotiate agreements that turn its mineral potential into lasting industrial gains rather than short-term commercial returns.

Achieving this objective requires a clear industrial development process. The priority should be independent feasibility studies to establish the resource's metallurgical characteristics, commercial viability, separation yields and environmental costs. The next stage would involve moving from pilot operations to commercial production of selected elements, followed by developing domestic alloy and permanent-magnet manufacturing. Given China's dominant position in processing and magnet production, Türkiye's strategic value should extend well beyond the volume of minerals it possesses (International Energy Agency, 2026; U.S. Geological Survey, 2026).

Critical minerals also place Türkiye's connectivity strategy within a broader geoeconomic framework. Ceyhan and the Development Road provide infrastructure for energy and trade flows, the defence industry contributes security capabilities, and Beylikova and similar resources supply strategic inputs for industrial production. Together, these assets could position Türkiye as a strategic hub capable of strengthening industrial, logistical and critical-material resilience across Europe, the Middle East and Asia, increasing its value to the United States beyond its traditional role as a military ally or regional transit country.

Policy Options for Türkiye: Five Strategic Tracks

Although the five policy tracks address different challenges, they share a common objective: strengthening Türkiye's ability to act independently when regional interests diverge. Security integration in Syria and the prevention of unintended military confrontation with Israel require sustained diplomatic attention, while defence commitments in the Gulf must rest on clearly defined legal limits. Institutional engagement with Washington, transport diplomacy through Iraq and the Turkic world, domestic defence production and investment in critical mineral processing will broaden Ankara's strategic options. Progress should be assessed through implementable decisions and verifiable outcomes on the ground, while preserving the flexibility to respond to changing regional circumstances.

The effectiveness of these policy tracks will depend not only on their individual merits but also on how Türkiye prioritises them when strategic objectives compete. A useful distinction can be drawn between immediate security imperatives, medium-term diplomatic opportunities and long-term investments in national capacity. Preventing military escalation along Türkiye's borders, consolidating security arrangements in Syria and avoiding unintended confrontation should take precedence where immediate

national security is at stake. Institutional engagement with Washington and carefully defined regional partnerships should then be pursued in ways that preserve diplomatic flexibility and avoid commitments that exceed available resources. Defence industrialisation, critical-mineral processing and transport connectivity, meanwhile, require sustained investment whose benefits will materialise over a longer period. These priorities should not be treated as rigid or mutually exclusive. Rather, decisions should be assessed against three criteria: their contribution to Türkiye's immediate security, their effect on its freedom of strategic choice and their capacity to generate durable national capabilities. The objective is not to pursue every available opportunity, but to ensure that short-term commitments do not undermine long-term autonomy.

The Ministry of Foreign Affairs should lead political coordination. At the same time, the Ministry of National Defence and relevant intelligence agencies should set objectives within their respective areas of responsibility, particularly on Syria and military deconfliction. The ministries responsible for trade, transport and infrastructure; industry and technology; and energy and natural resources should likewise set objectives for trade, transport corridors, and critical minerals. Regular interagency assessments would help translate opportunities created through leader-level diplomacy into lasting institutional arrangements, ensuring that the different policy tracks reinforce one another.

Option A – Institutional Management of Relations with the United States

Türkiye should conduct its discussions with the United States on defence, Syria, trade, energy, technology and critical minerals through separate but coordinated institutional channels. The relationship between Trump and Erdoğan offers opportunities to advance the F-35 and CAATSA dossiers, strengthen cooperation on Syrian security and expand commercial ties. Lasting agreements, however, require sustained engagement with Congress, US government institutions and the defence bureaucracy. Ankara should ensure that an impasse in one area does not halt negotiations on other matters.

The air defence dimension of bilateral negotiations requires particular attention. While maintaining its existing position on the S-400 and accounting for its security requirements, Ankara should continue negotiations on the F-35 and CAATSA within an institutional framework. At the same time, it should maintain and strengthen investment in indigenous air and missile defence systems, radar, electronic warfare and cyber security. The value of any agreement in the defence sector should be measured not simply by procurement decisions, but by its contribution to Türkiye's own technological and manufacturing capabilities. Progress in the domestic defence industry must also be supported by independent capabilities in data processing, military software, satellite communications and cyber security. In modern warfare, technological superiority depends as much on control over the data, software and communications networks governing weapons systems as on the ability to manufacture those systems.

Congress has a particularly important role in placing US–Türkiye relations on a more institutional footing. The F-16 sale considered in 2024, following Türkiye's ratification of Sweden's accession to NATO, provides a relevant example. After the US administration notified Congress of the proposed sale, valued at about $23 billion, an attempt to block it in the Senate failed 79 to 13 (U.S. Senate, 2024). The episode demonstrated that, despite disagreements within the American legislature, political support can be built around shared security interests. Ankara should therefore look beyond its relationship with the White House and maintain regular engagement with members of the Senate and House of Representatives, relevant congressional committees, defence institutions, business organisations and think tanks. Transparent, professional lobbying conducted in accordance with US law could also help communicate Türkiye's security concerns, economic contributions, and role within NATO more effectively to American decision-makers.

This approach aims to build a bilateral relationship that can endure beyond the political understanding between incumbent presidents. Sanctions legislation, congressional objections and changes of administration can delay or prevent the implementation of agreements supported at the presidential level. Stronger institutional ties, by contrast, could prevent disagreements in one area from disrupting cooperation across the wider relationship. For Türkiye, tangible measures of progress should include legally enacted decisions, regularly functioning technical negotiation mechanisms, mutual gains in defence and technology, and institutional contacts that continue through changes of administration. Ankara should capitalise on the political opportunities of the Trump presidency while building a capacity for cooperation and negotiation that can be sustained under future US administrations.

Option B – One State, One Security Chain in Syria

This policy track brings the objectives of a Terror-Free Türkiye and a Terror-Free Region together with Syria's sovereignty and reconstruction within a single security framework. Its principal instruments are the verification of the YPG's dissolution and integration at the level of command structures, heavy weapons, border control, detention facilities and security institutions; the uninterrupted transfer of counter-Daesh responsibilities to legitimate Syrian institutions; and the advancement of equal citizenship and local governance guarantees alongside the consolidation of security.

An effective, unified chain of command in Syria could narrow a longstanding area of disagreement between Ankara and Washington while reducing the risk posed by autonomous armed groups along Türkiye's border. Formal integration, however, will be insufficient if command arrangements or heavy weapons remain outside state control. An excessively rapid transfer of security responsibilities could also leave gaps in efforts to monitor and contain Daesh's remaining networks. The principal benchmarks should therefore be the surrender of heavy weapons, state control over border crossings and detention facilities, and the effective dismantling of parallel command structures. Nor should the indirect benefits Israel derives from terrorist organisations of this kind in the region be overlooked.

Option C – A Layered Regional Architecture for Gulf and Maritime Security

This policy track treats the Makkah Joint Defence Agreement, the R4 framework, Türkiye–Iraq security mechanisms and maritime security arrangements as distinct but complementary layers of a regional security architecture. Collective defence, diplomatic consultation, maritime security in the Bab el-Mandeb Strait and the Strait of Hormuz, air and missile defence, intelligence sharing and mediation should be governed by clearly defined decision-making procedures rather than placed under a single institution with ambiguous responsibilities.

When defence commitments, intelligence arrangements and diplomatic channels operate in coordination, regional countries can manage a greater share of security crises through their own capabilities. The principal danger lies in partners with different threat perceptions becoming drawn into a conflict before their obligations are clearly established. The Bab el-Mandeb–Houthi crisis provides a practical test of command arrangements, activation procedures and the boundary between defensive support and offensive operations. Even as collective defence provisions are considered, channels for mediation should remain open.

Option D – Geoeconomic Autonomy and the Technology Value Chain

Türkiye should develop Beylikova's rare-earth potential as part of a long-term industrial strategy supporting defence and advanced technology production, rather than treating it primarily as a source of revenue from raw ore exports. The central objective should be to establish a domestic value chain encompassing separation, refining, metallurgy, alloy production and permanent magnets. In partnerships with technology providers from the United States, Europe and Asia, domestic value added, environmental standards, water and energy requirements, and national decision-making authority should be among the conditions governing investment agreements.

The strategic rationale lies in the concentration of production and processing capabilities within critical mineral supply chains. China's dominance, particularly in refining and permanent magnet manufacturing, has encouraged the United States and Europe to develop alternative suppliers and processing centres. However, owning mineral resources does not automatically translate into technological superiority. Where separation technologies, skilled labour, and high-value manufacturing remain concentrated abroad, raw-material exporters may find themselves dependent on foreign technology. The diplomatic and economic leverage Türkiye can derive from Beylikova will therefore depend directly on the capabilities it establishes along the production chain (International Energy Agency, 2026).

Ankara should consequently negotiate terms with foreign investors that go beyond financing and export revenues. Processing facilities established in Türkiye, access to technology for Turkish engineers, joint research and development, intellectual property arrangements, and the participation of domestic suppliers in production could all be incorporated into investment contracts as specif-



(Zekeriya Albayrak - Anadolu Agency)

ic obligations. Such provisions would help Türkiye retain decision-making authority over its strategic resources while creating opportunities for more balanced industrial partnerships with the United States and other countries. Working with a range of investors and technology partners would also reduce dependence on any single country or company.

Beylikova's economic potential must nevertheless be assessed realistically. Independent feasibility studies should establish the ore's metallurgical characteristics, separation efficiency, commercial viability, and environmental costs. Decisions on commercial production should be informed by which elements can be processed at competitive costs, as well as energy and water requirements, the availability of specialised personnel and long-term offtake agreements. This would allow Türkiye to direct investment toward commercially viable production rather than commit resources based on the deposit's reported size alone.

The industrial strategy should also be integrated with Türkiye's transport and energy connections. The Development Road, the Middle Corridor and Ceyhan should be regarded as infrastructure linking production and distribution networks, rather than simply as routes through which goods pass. Connecting critical mineral processing facilities with industrial zones, ports, railways and export markets could strengthen Türkiye's geoeconomic position. Ankara would thereby be better placed to negotiate with different partners amid US–China technological competition, process critical inputs domestically and contribute to advanced manufacturing.

The success of this policy should be assessed primarily through the productive capacity actually established, rather than announced investment figures or the estimated size of mineral resources. Commercially operational facilities, domestic engineering and manufacturing participation, technology transfer achieved in practice, environmental performance and diversified export markets would indicate the extent to which Türkiye has converted its critical mineral potential into lasting industrial strength.

Option E – Managing Türkiye–Israel Tensions

Türkiye's military experience, NATO membership and expanding indigenous defence industry provide it with substantial deterrent capabilities vis-à-vis Israel. Ankara's

strategy towards Israel should therefore not be shaped solely by the prospect of a direct military threat. The risks arising from Israel's regional activities must also be assessed beyond conventional military capabilities. Türkiye's security institutions should closely monitor potential cyberattacks against strategic facilities, foreign intelligence networks, and attempts to exploit social tensions through disinformation and illicit financial channels.

Developments in Syria represent the most sensitive dimension of this security equation. Diplomatic engagement with Washington is important in seeking to limit Israeli attacks that violate Syrian sovereignty. A direct military confrontation between Turkish and Israeli forces could transform existing bilateral disagreements into a broader regional crisis. Such an incident might compel Washington to make more explicit choices between two regional partners while also heightening political tensions within NATO. Türkiye should therefore continue strengthening its deterrence capabilities while supporting the consolidation of central state authority in Syria and regional diplomatic initiatives aimed at restricting Israel's military room for manoeuvre.

The more fundamental question, however, concerns the political and economic conditions that sustain Israel's regional military power. Despite its advanced defence industry and intelligence infrastructure, US military assistance, weapons supplies, joint defence programmes and diplomatic backing play a significant role in Israel's ability to project force across the region. Washington's $38 billion military assistance memorandum covering 2019–2028 demonstrates the institutional character of this relationship, which extends beyond individual presidencies. Nevertheless, the future of this assistance remains subject to Congress's budgetary authority and decisions taken by successive US administrations. In April 2026, two initiatives in the Senate seeking to block particular arms sales received 40 and 36 votes in support, respectively, illustrating the growing debate within American politics over military assistance to Israel.

In this context, arrangements governing assistance beyond 2028 will represent an important turning point. At a time when the United States is seeking to allocate more resources to its strategic competition with China, Israel's regional military operations can impose additional costs on American weapons stocks, defence spending, force deployments and diplomatic relationships. Türkiye should make the relationship between US support for Israel and the strategic burden it creates a central consideration in its assessment of US policy. Ankara should use its institutional dialogue with Washington to draw attention to the consequences of Israeli attacks for Syria's stability, energy security, regional trade and American military commitments.

Israel's domestic political and economic circumstances constitute another important part of this strategic equation. Prolonged military mobilisation, the demand for reservists, the unequal distribution of military service obligations across different sections of society and rising public expenditure have become intertwined with existing political disagreements within the country. According to a December 2025 assessment by the Bank of Israel, the economic cost of one month of service for a reservist is approximately 38,000 shekels (around $12,300). This demonstrates that the costs of regional military operations extend well beyond the defence budget, affecting productive capacity, labour supply and long-term economic performance. Any assessment of Israel's military strength must therefore also consider how long the country can sustain such operations and at what cost to its own society.

Against this background, Türkiye should move away from placing claims that it will be Israel's next regional target at the centre of its security strategy and public debate. Instead, Ankara should concentrate on changing the conditions that enable Israel to sustain its aggressive policies. Its principal strategic objective should be to constrain the military and diplomatic support Israel receives from the United States while strengthening the conditions that would compel Israel to devote greater attention to its own political, social and economic problems rather than military interventions abroad. The conditioning and restriction of US military assistance, greater economic and legal pressure in Europe, and the deepening of existing debates within Israeli society over the costs of prolonged warfare are central elements of this strategic shift. Türkiye should do more than observe these developments. It should coordinate diplomatic initiatives, international public diplomacy, lobbying directed at decision-making processes in the United States and Europe, and its intelligence analysis and operational capabilities. Narrowing Israel's regional room for manoeuvre and reshaping the external support it relies on would enable Türkiye to protect its security interests while establishing a more effective strategic balance against Israel's aggressive regional policies.

Policy Options Matrix

Policy track	Key instruments	Potential gains	Principal risks	Indicators of success
A. Institutional management of US relations	Separate but coordinated channels for defence, F35/CAATSA, trade and technology; sustained congressional engagement; indigenous defence capabilities.	More predictable bilateral relations; reduced spillover between disputes; greater technological autonomy.	Congressional and legislative obstacles; sanctions; excessive reliance on presidential diplomacy.	Concrete defence decisions; functioning institutional channels; technological gains; cooperation sustained across administrations.
B. One state, one security chain in Syria	Verified YPG dissolution and integration; unified command; state control of heavy weapons, borders and detention facilities; continuity of counter-Daesh operations.	Reduced border threats; stronger Syrian state authority; fewer sources of friction between Ankara and Washington.	Superficial integration; persistence of parallel armed structures; security gaps exploited by Daesh; external interference.	Unified command; verified weapons transfers; state control of borders and detention facilities; dismantling of parallel security structures.
C. Layered Gulf and maritime security architecture	Makkah Joint Defence Agreement; R4 consultations; maritime security; air and missile defence; intelligence sharing and mediation.	Greater regional ownership of security; stronger collective resilience; improved protection of strategic waterways.	Entrapment in regional conflicts; divergent threat perceptions; unclear defence obligations and operational mandates.	Defined activation rules; effective command arrangements; operational coordination; maritime security in Bab el-Mandeb and Hormuz.
D. Geoeconomic autonomy and the technology value chain	Domestic rare-earth processing and magnet production; technology-transfer agreements; industrial investment; Development Road, Middle Corridor and Ceyhan connectivity.	Stronger industrial capabilities; greater technological bargaining power; more resilient supply chains.	Dependence on individual technology providers or markets; low-value raw material exports; environmental and commercial viability risks.	Operational processing facilities; verified technology transfers; domestic value added; environmental performance; diversified export markets.
E. Managing Türkiye–Israel tensions and the regional order	Diplomatic engagement on US military assistance and arms-transfer oversight; European economic and legal mechanisms; assessment of Israel's domestic war costs; Turkish deterrence and Syria-focused diplomacy.	Greater scrutiny of external support for Israeli military operations; stronger Turkish diplomatic leverage; higher political and economic costs of regional escalation.	Resistance within US institutions; divisions among European partners; unpredictable Israeli domestic politics; military escalation in Syria.	Changes in US military assistance and arms-transfer conditions; concrete EU economic or legal measures; trends in Israeli military incursions into Syria; stronger Turkish deterrence and security capabilities.

Conclusion

The transformation of US strategy in the Middle East reflects Washington's efforts to redistribute the costs of its military and political commitments without relinquishing its influence in the region. While regional partners are expected to assume greater responsibility, the United States continues to preserve its capacity for military intervention, its influence over strategic maritime routes and its strong support for Israel. The crises arising from Israel's regional military operations, in particular, complicate Washington's efforts to reduce its involvement in the Middle East and redirect resources towards strategic competition with China. For Türkiye, this creates a strategic environment in which opportunities for cooperation with the United States coexist with persistent differences in the two countries' regional priorities.

The central challenge for Türkiye is how effectively it can translate its military, diplomatic and economic capabilities into influence over regional developments. NATO membership, an expanding defence industry, regional partnerships and its geoeconomic position provide Ankara with considerable advantages. Their strategic value, however, ultimately depends on Türkiye's ability to implement its own decisions when national interests diverge from those of its allies. Strategic autonomy should therefore not be understood as disengagement from international partnerships or the pursuit of complete self-sufficiency across every sector. What matters is the development of institutional capabilities that can turn political understandings into workable decisions, manage the constraints arising from external dependencies and deploy alternative policy instruments as circumstances change. The distinction between announced agreements and their implementation, diplomatic achievements and legally enforceable outcomes, and the possession of resources and the technological value derived from them provides a more meaningful measure of Türkiye's strategic room for manoeuvre.

This perspective is equally important when assessing Türkiye's position vis-à-vis Israel. Placing claims that Türkiye could become Israel's next target at the centre of security debates risks allowing Ankara's strategic agenda to be shaped by the anticipated actions of another country. Türkiye's military experience, its position within NATO and its indigenous defence capabilities already provide a strong foundation for deterrence. Israel's ability to project military power across the region, meanwhile, depends on more than its own military resources. American military and diplomatic support, international economic relations and the domestic costs of prolonged conflicts directly affect the sustainability of its operations. Ankara's strategic priority should therefore be to strengthen international mechanisms capable of increasing the political, economic and diplomatic costs of Israel's occupation and expansionist policies. Such an approach would allow Türkiye to maintain its deterrence capabilities while developing a broader strategy aimed at influencing the conditions under which regional military interventions take place.

The opportunities created by the Trump–Erdoğan dialogue are important in this context, but Türkiye's long-term strategic position must not depend on the political preferences of the leadership in Washington. Administrations change, interests within alliances diverge, and political understandings reached today may encounter new disagreements in the future. For Ankara, lasting gains will therefore depend on translating present opportunities into institutional continuity, technological expertise and independent decision-making capacity. The true measure of Türkiye's regional power lies as much in its ability to influence the course of international developments as in its responses to them. In the changing Middle Eastern order, Türkiye's position will ultimately be determined by the extent to which it can help shape the regional order in accordance with its own strategic priorities, rather than by how closely it aligns itself with the policies of major powers.

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