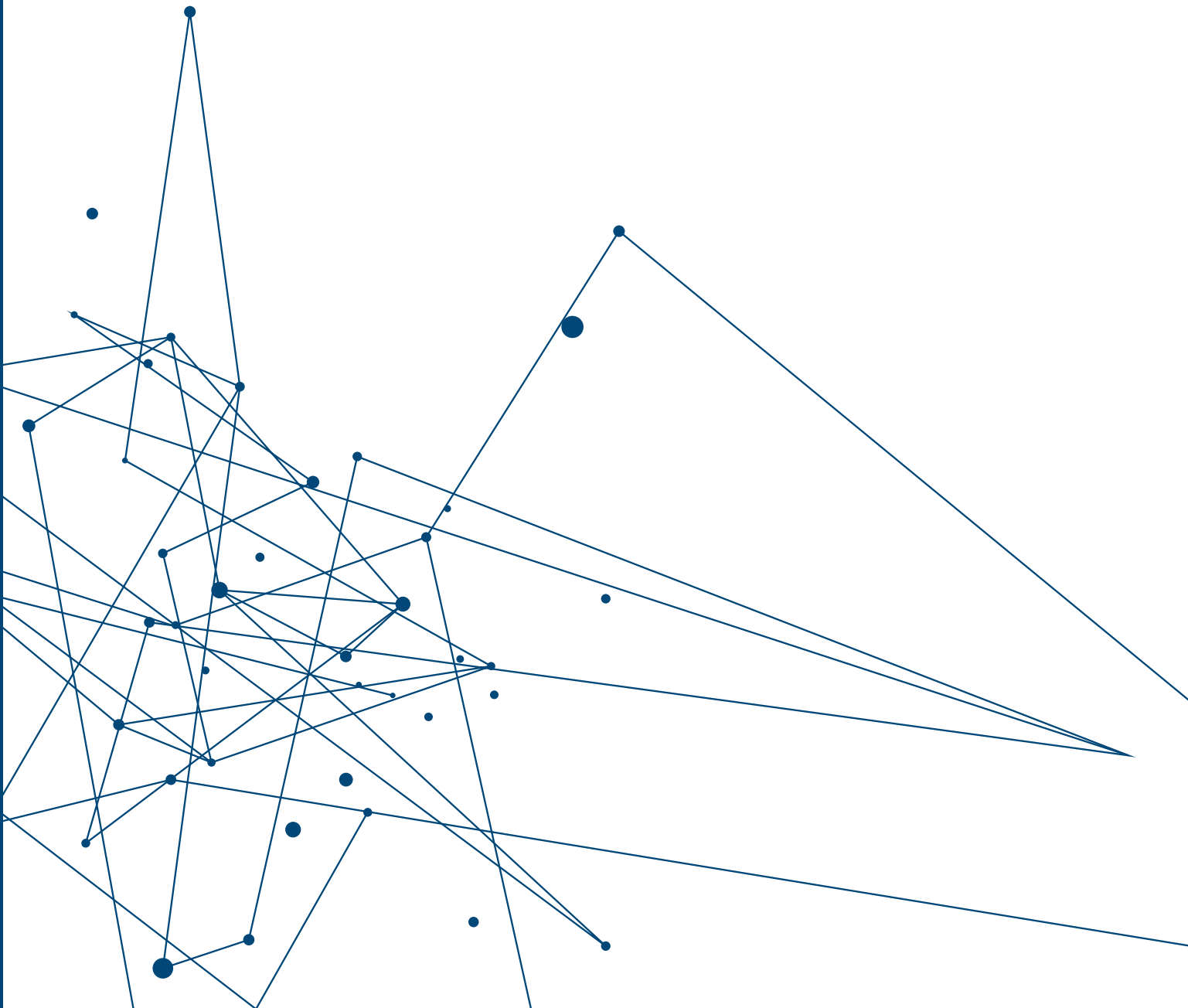


CATS NETWORK PAPER | NO. 01 | 09.04.2024

Rival, Partner, or Something in-between?

Max Montgomery



Germany is adapting its Africa strategy to changing geopolitical realities. Africa is increasingly becoming a contested ground for international competition from established players and new actors. Will this reset from Berlin result in Germany and Turkey being at odds or working together?

This paper is part of a series of six CATS Network Papers assessing Turkey's engagement with Africa from the perspectives of Germany, France, Italy and Spain, complemented by analyses from Turkey itself and two major actors on the continent, Egypt and Ethiopia.

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Table of Contents

1.	Ankara and Berlin in Africa	4
2.	Germany's Engagements in Africa	6
2.1	Germany's Economic Policy toward Africa	7
2.2	Germany's Security Agenda for Africa	12
2.3	Germany's Development Cooperation Profile in Africa	14
3.	German – Turkish Relations: Unavoidable and Volatile	18
4.	German Perspectives on Turkey's Rise in Africa	21
4.1	Economic Relations	22
4.2	Defence and Security	26
4.3	Development Cooperation	29
5.	Ankara's African Engagements in the context of Geopolitics	31
6.	The Future of German-Turkish Relations in Africa	33
	Abbreviations	36

1.

Ankara and Berlin in Africa

Turkey's emergence as a relevant actor in Africa has challenged the continent's geopolitical status quo. Since 1998, Ankara has skilfully employed a mixture of diplomatic initiatives, development assistance, economic policy, and security cooperation to pursue an autonomous foreign policy. Turkey's Africa initiative is closely associated with the regime of President Recep Tayyip Erdoğan, who has presented himself to be a regional leader and champion of African interests, in line with Ankara's ongoing efforts to increase its geopolitical influence. Ankara's foray into Africa has been noticed in German business, journalistic, and political circles. Prominent media outlets, such as Die Zeit, Frankfurter Allgemeine Zeitung, and Deutsche Welle have featured Turkey's growing economic, security, and development footprint in Africa in their reporting. Even the recently released Africa Strategy of the German Federal Ministry for Development and Economic Cooperation (BMZ) cites Turkey's activities in Africa.

Reports of Turkey's growing footprint in Africa have found a receptive audience in Berlin, which is in the process of adapting to the geostrategic realities of the 21st century. German Chancellor Olaf Scholz's declaration of an epochal turning point ("Zeitenwende") in the wake of Russia's invasion of Ukraine in February 2022 prompted a fundamental reassessment of German foreign and security policy on the premise of reducing dependence on partners with divergent values and interests, such as Russia and China. In this context, German policymakers increasingly recognise Africa as an opportunity to build geostrategic partnerships, safeguard energy security, and diversify Germany's export structure. This comes at a time when geopolitical competition over access to Africa's resources and promising markets has intensified over recent years, as global powers have increased their attention, investments, and interests on the continent. While China, Russia, and others have stepped up their ambitions, African governments, long discontent with the asymmetrical power relations with the United States (US) and European countries, are now able to be more selective in their choice of partners.

This has prompted a reassessment of the German engagement model with the African continent, which was hitherto dominated by Germany's extensive role in the provision of traditional development assistance and concerns about irregular

migration. The “Africa Strategy” of the German Ministry for Development and Economic Cooperation (BMZ), released in January 2023, acknowledges the failures of the past—primarily the asymmetrical relationship and Germany’s paternalistic approach to the continent—and centres German-African cooperation within the context of geostrategic competition: Germany must make more “attractive offers” to African states than other geopolitical players such as China, Russia, and increasingly Middle Powers, such as Turkey.

2.

Germany's Engagements in Africa

Berlin's Africa policy has transformed substantially since the early 2000s, as the northern European nation shifted from a long-term relevant but relatively passive actor to a significantly more influential player in Africa. Today, Germany ranks among Africa's most important bilateral donors and trade partners. It has increased its security engagements by participating in multiple peacekeeping missions (such as in Mali and South Sudan) and coordinating multilateral diplomatic efforts for peace and conflict resolution.

Nonetheless, Germany's growing interest in Africa has failed to produce a substantial and sustainable increase in economic, political, or security engagements. Since 2011, multiple federal and ministerial initiatives have sought to ground Germany's approach to the continent in a coordinated strategy, with mixed results at best. The German Federal Government introduced its first comprehensive strategy in 2011, followed by the Policy Guidelines for Africa in 2014, and An Enhanced Partnership with Africa in 2019. Migration has been a central aspect of Germany's relations with Africa since 2015. Consequently, Germany stepped up its security engagements in North Africa and the Sahel region and recalibrated its development policy to combat the causes of irregular migration.

The last Angela Merkel-led government (2017-2021) proclaimed Africa to be a "continent of opportunity" and launched a multi-sectoral attempt to promote African development by mobilising private-sector engagement for development purposes in Africa. These included the Compact with Africa (CwA) during Germany's G20 Presidency in 2017, the Marshall Plan with Africa outlined by the Ministry for Cooperation and Development (BMZ), and the Pro! Afrika Initiative by the Ministry for Economic Affairs and Energy. The most recent document, the BMZ's Africa Strategy from 2023 aims to redefine German-African cooperation as mutually beneficial partnerships with a focus on African ownership.

The current centre-left government has initiated a reassessment of Germany's engagement with Africa, recognizing the continent's growing global significance. In the context of the geopolitical upheaval following Russia's invasion of Ukraine and

heightened global competition for African resources and partnerships,¹ Chancellor Scholz proclaimed “a multipolar world in which Africa will become [...] a global centre of gravitation.”² Consequently, Berlin has intensified its diplomatic outreach to African countries. In May and June of 2022, Scholz embarked on an official tour of Senegal, Niger, and South Africa, marking his first state visit to Africa just about half a year after taking office. This was followed by a visit to East Africa in April 2023. In contrast, it took his predecessor Angela Merkel more than two years for an official visit to Africa. Furthermore, the Minister for Economic Affairs and Climate Action, Robert Habeck, visited Namibia and South Africa in December 2022 to promote investments in green hydrogen and participate in the fourth German–African Business Summit in Johannesburg.

2.1

Germany’s Economic Policy toward Africa

Germany’s economic activity in Africa is robust but remains geographically and sectorally concentrated. Trade levels experienced significant declines during the commodity–price crisis of 2014–2016 and the COVID–19 pandemic but quickly recovered. Although the volume of German–African trade even reached a new peak of \$63.1 billion³ in 2022, this growth was mainly attributed to the catch–up effect following the COVID–19 pandemic and global price increases, especially for oil and gas.⁴ The nominal increase in the volume of African exports to Germany is expected to continue because of the Russian invasion of Ukraine and its effect on energy availability and global prices. Germany’s direct investment (FDI) portfolio in Africa grew slightly from \$11.9 to \$13.0 billion between 2017 and 2018, but has remained mostly stagnant since.⁵ Between 2016 and 2020, German companies invested around \$9.7 billion in Africa, which is less than one–seventh of Chinese investments (\$70.6 billion) and less than half of US (\$23.7 billion) and French (\$19.7 billion) investments

¹ Fonteh Akum and Denis Tull, *Strategic Competition and Cooperation in Africa*, Policy Brief 13 (Berlin: Megatrends Afrika, February 2023)

² German Government, “Speech by Federal Chancellor Olaf Scholz at the Presentation of the German Africa Award”, Berlin, 25 November 2022, <https://www.bundesregierung.de/breg-en/news/speech-by-federal-chancellor-2157042>

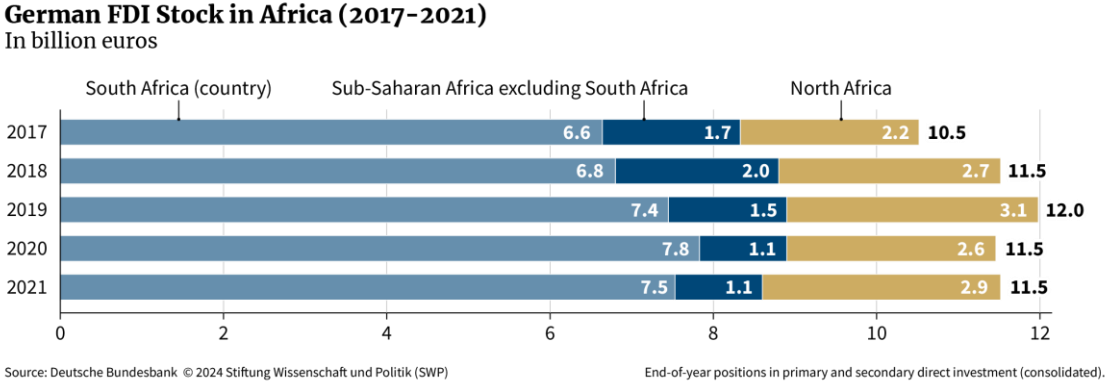
³ Author’s calculation based on Statistisches Bundesamt (Destatis), *Database of the Federal Statistical Office of Germany: 51000: Exports and imports (foreign trade)*, 2023, <https://www-genesis.destatis.de/genesis/online>

⁴ While German exports to Africa increased by 14 per cent from 2021 to 2022, but 5.6 per cent of this increase was explained by rising export prices. For African imports to Germany, price increases drove 13.5 per cent of the 17.1 per cent increase from 2021 to 2022.

⁵ Author’s calculation at 2017 exchange rates based on Deutsche Bundesbank (German Federal Bank), *Direct Investment Statistics*, 2022, 51–52, <https://www.bundesbank.de/en/statistics/external-sector/direct-investments/direct-investment-statistics-811578>

during the same period.⁶ Although its investments are dwarfed by others, Germany remains an important investor, ranking as the sixth largest bilateral investor in Africa.

Figure 1⁷



Germany’s and the European Union’s (EU) economic relevance has abated slightly in recent years, as more countries, foremostly China and the rising middle powers such as Turkey, Brazil, the United Arab Emirates, India, and Saudi Arabia have expanded their economic stakes in Africa. Nonetheless, Germany still ranks as the continent’s ninth-largest bilateral trade partner and fourth-largest within the EU, following France, Spain, and Italy. The EU remains Africa’s most important trade partner, although its share of the overall trade volume has dropped from 27.7 per cent in 2016 to 25.8 per cent in 2022. However, Africa will remain a marginal economic destination for the export-oriented German economy in the foreseeable future. Trade with African countries amounted to only 1.9 per cent of total German trade between 2018 and 2022.⁸ In the same period, more than half of Germany’s trade (53 per cent) took place within the EU single market and with other major trading partners China (9.1 per cent), the US (7.7 per cent), and the United Kingdom (UK) (4.3 per cent). South Africa—Germany’s most important trade partner on the African continent by far—was only ranked twenty-eighth among German trade partners by volume.⁹

This is particularly striking, as German economic relations with Africa are influenced by the special relationship with South Africa. German-South African accounts for 40

⁶ Ernest and Young Africa (EY), *EY Attractiveness Report: Africa*, (November 2021): 20, https://assets.ey.com/content/dam/ey-sites/ey-com/en_za/topics/attractiveness/reports/ey-aar-reset-for-growth-final.pdf

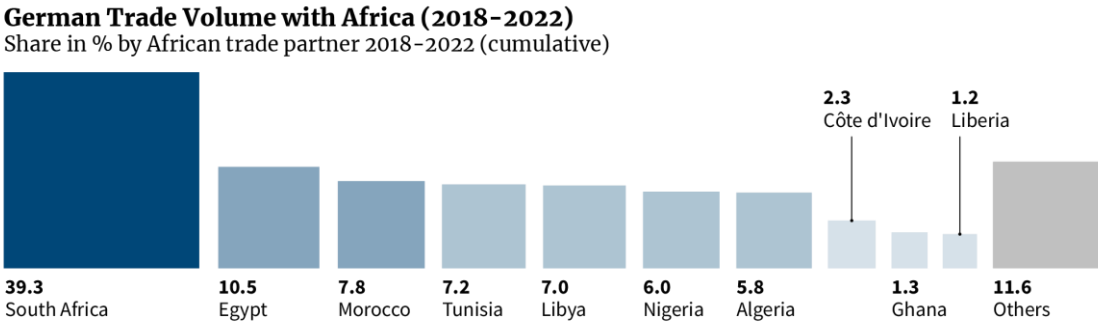
⁷ End-of-year positions in primary and secondary direct investment (consolidated). Author’s calculation based on Deutsche Bundesbank (German Federal Bank), *Direct Investment Statistics*, 17 August 2023, <https://www.bundesbank.de/en/statistics/external-sector/direct-investments/direct-investment-statistics-811578>

⁸ Author’s calculation based on Statistisches Bundesamt (Destatis), *Database of the Federal Statistical Office of Germany: 51000: Exports and imports (foreign trade)*, 2023, <https://www-genesis.destatis.de/genesis/online>

⁹ Ibid

per cent of German total trade with Africa and almost two-thirds (64 per cent) of German trade with Sub-Saharan Africa.¹⁰ South Africa serves as a central destination in the global automotive industry supply chain with German car companies establishing manufacturing facilities in the country. Consequently, in 2021, German FDI positions in South Africa stood at \$7.53 billion or around 65 per cent of all German FDI to Africa and 88 per cent of German FDI to Sub-Saharan Africa. Most cars produced in South Africa are destined for European markets.¹¹ German imports from Africa in the automotive sector are almost always driven by South African imports comprising 13 per cent of German total imports from Africa.¹²

Figure 2¹³



Source: Federal Statistical Office of Germany (Destatis) © 2024 Stiftung Wissenschaft und Politik (SWP)

In general, Germany exports sophisticated technological and industrial products to Africa in exchange for imports of commodities and raw materials. Machinery, including electrical machinery, constitutes 31.7 per cent of Germany's exports to Africa, followed by automotive vehicles (17.8 per cent) and chemical products (14.5 per cent).¹⁴ On the import side, fossil fuels and ores alone make up 39.2 per cent of German imports from Africa, with precious metals adding another 9 per cent.

In the case of North Africa, energy imports, mainly oil and natural gas, comprise more than half of German imports (50.3 per cent). Nonetheless, the well-established energy sectors and transportation networks of North African countries', along with their geographic proximity to the European mainland, contribute to their elevated position in Germany's overall economic portfolio in Africa. Combined, the North African countries account for 38.4 per cent of Germany's trade with Africa and 25 per cent of German FDI stocks in the whole continent.¹⁵ Recently, Morocco has surpassed Egypt

¹⁰ Ibid
¹¹ Julian Hinz, Sonali Chowdhry, Anna Jacobs and Rainer Thiele, *Effects of the AfCFTA for German and European Companies* (Kiel: Kiel Institut für Weltwirtschaft, 10 November 2022), [giz2022-en-effects-afcfta-germany-europe.pdf](#); Author's calculation based on Deutsche Bundesbank (German Federal Bank), 2023
¹² Author's calculation based on Statistisches Bundesamt (Destatis), 2023
¹³ Ibid
¹⁴ Ibid
¹⁵ Author's calculation based on Deutsche Bundesbank (German Federal Bank), 2023

as the second most important destination for German FDI, holding around 13 per cent of FDI in 2021. More than a quarter of German companies moving to Morocco over the last decade operate in the automotive sector. North Africa's oil and gas sectors have also attracted German investments. Primarily, these were conducted by Wintershall Dea AG, which operates several concessions in Egypt, Libya, and Algeria.

Berlin has repeatedly emphasised the importance of increasing economic relations with other African regions, primarily West and East Africa, but meaningful trade increases have not yet been realised. Many German companies hesitate to enter African markets due to political instability, unreliable infrastructure, complex administrative structures, and small middle classes.¹⁶ However, as African markets are growing, more German companies are considering an expansion of their African business activities. According to recent surveys, 43 per cent of German companies plan to increase their investment in Africa¹⁷ and more than half of the German companies in Africa expect growth in 2023.¹⁸

Germany is set to increase its economic activities in several African sectors. Germany's automotive industry is seeking to capitalise on Africa's growing car markets by establishing local production capacity beyond South Africa and North Africa. German automotive investment has recently targeted West Africa (Nigeria, Ghana) and East Africa (Rwanda, Kenya). Nonetheless, this appears to be more of an experiment than a long-term commitment to maintain a presence in these markets. The assembly plants set up by German companies in these countries are currently small and contribute little to manufacturing value.¹⁹

Debates over how to recapture lost market share in the infrastructure sector have intensified both in Germany and the EU. German construction companies and infrastructure developers have mostly withdrawn from the continent, despite the ongoing infrastructure boom in Africa. German construction leaders consider African projects too risky and charge uncompetitively high prices. A perceived lack of government support further reduces companies' appetite to enter the African construction market. The German government is not known to engage in extensive bilateral lobbying efforts in favour of its own companies and offers only limited investment risk guarantees (so-called "Hermes covers").²⁰ In the past decade,

¹⁶ Author's interview with members of a German business association, December 2022

¹⁷ Rene Wagner, "German companies plan to invest more in Africa in 2023", *Reuters* (online), 27 December 2022, [https://www.reuters.com/business/german-companies-plan-invest-more-africa-2023-2022-12-](https://www.reuters.com/business/german-companies-plan-invest-more-africa-2023-2022-12-27/#:~:text=BERLIN%2C%20Dec%2027%20(Reuters),by%20Reuters%20on%20Tuesday%20showed)

¹⁸ Association of German Chambers of Industry and Commerce (AHK), *AHK World Business Outlook Fall 2022* (Berlin, November 2022), <https://www.dihk.de/resource/blob/86472/14f259c5b3daa908b1c2964383ff3c63/ahk-world-business-outlook-fall-2022-data.pdf>

¹⁹ Ashutosh Pandey and Insa Wrede, "German car industry raises African ambitions", *Deutsche Welle* (online), 01 July 2021, [https://www.dw.com/en/german-cars-auto-africa-vw/a-](https://www.dw.com/en/german-cars-auto-africa-vw/a-56156343#:~:text=While%20many%20of%20the%20German,over%20the%20past%20few%20years)

²⁰ "How Chinese firms have dominated African infrastructure", *The Economist* (online), 19 February 2022, https://www.economist.com/middle-east-and-africa/how-chinese-firms-have-dominated-african-infrastructure/21807721?utm_medium=cpc.adword.pd&utm_source=google&ppccampaignID=1815173

European companies in general have lost their once dominant position in the African construction market, as they were unable to compete with Chinese companies. Chinese builders—propped up by state subsidies and diplomatic lobbying—can build at much lower prices and larger scales than German construction companies. To date, Chinese companies accounted for 31 per cent of all large-scale construction projects in Africa in 2020.

Recent high-level efforts indicate a willingness to strengthen Germany's and the EU's role in the African infrastructure sector. In 2021, Germany secured the first large-scale infrastructure project in years, namely Siemens's \$8.7 billion new high-speed railway system for Egypt. This was achieved with political support from the German government and substantial public risk insurance in the form of Hermes guarantees²¹ contributed to the award of the project.²²

In the same year, the EU launched the Global Gateway initiative, which aims to mobilise \$331 billion in investments to support infrastructure development worldwide, with half of the funds (\$165.5 billion) earmarked for Africa. Global Gateway seeks to provide favourable conditions for infrastructure projects in African countries, promote the EU's strategic autonomy, enhance economic integration with the African continent, and serve as a counterbalance to China's Belt and Road Initiative (BRI). In Africa, Global Gateway primarily focuses on investments in multi-country transport infrastructure, food security, and facilitating the transition from fossil fuels to renewable energy.

Russia's invasion of Ukraine in 2022 has underscored the importance of strategic autonomy and energy transition for German energy security.²³ In search of short-term solutions to German dependence on Russian gas, Germany has a keen interest in developing and procuring liquefied natural gas (LNG) in Africa.²⁴ On a recent visit to Dakar in May 2022, Chancellor Olaf Scholz indicated his interest in discussing a German contribution to the development of Senegal's gas fields.²⁵

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²¹ Hermes guarantees (state export credit guarantees) provide an instrument by the German government to protect German companies and banks operating in international settings from payment default.

²² "Egypt signs €8 billion deal with Siemens for high-speed rail", *Deutsche Welle* (online), 29 May 2022, <https://www.dw.com/en/egypt-signs-8-billion-deal-with-siemens-for-high-speed-rail-system/a-61967258#:~:text=The%20German%20industrial%20group%20Siemens,based%20company's%20175%20year%20history>

²³ Interview with representative of German business association, January 2023

²⁴ The German interest in African LNG development comes in spite of the government's commitment to achieve climate neutrality by 2045 and rely on renewable sources for 80 per cent of its energy by 2030 and "almost exclusively" by 2035.

See Federal Government of Germany, *Amendment to the Renewable Energy Sources Act (EEG 2023)* (Berlin, 28 August 2022), <https://www.bundesregierung.de/breg-de/schwerpunkte/klimaschutz/amendment-of-the-renewables-act-2060448>

²⁵ Karamba Diaby, "Wo bleibt die Augenhöhe?", *Internationale Politik und Gesellschaft (IPG)*, 02 February 2023, <https://www.auswaertiges-amt.de/en/aussenpolitik/regionaleschwerpunkte/afrika/afrika-leitlinien-node>

In the medium- to long-term, however, Germany's primary agenda for the energy sector is the promotion of renewables to boost Africa's economic integration, create opportunities for well-positioned German renewables companies in Africa, and import surplus energy in the future to satisfy the growing domestic demand. The National Hydrogen Strategy 2020 is currently being updated to reflect the importance of green hydrogen. Currently, only 5 per cent of the hydrogen used in Germany is green, but the demand for it is expected to rise substantially over the coming years. As domestic production capacities in Germany can only cover up to 14 Terawatt-hour (Twh)—15 per cent) of the projected demand in 2030—Berlin will have to import most of its projected hydrogen consumption.

2.2

Germany's Security Agenda for Africa

Germany's security footprint in Africa primarily revolves around contributing to peacekeeping and stability efforts, supporting regional security initiatives, such as the African Peace and Security Architecture (APSA), and providing substantial development assistance to crisis prevention, stabilisation, and peacebuilding. Germany is in the process of winding down its military presence in the region following the failure of the United Nations Multidimensional Integrated Stabilization Mission in Mali (MINUSMA) and intends to increase the deployment of soft-power tools to promote African security. The African continent as a whole has not been a major destination for German arms exports, but Germany has exported substantial quantities of weaponry to a select number of African partners.

Berlin—intent on demonstrating more international responsibility—joined the French-led MINUSMA with a small contingent of 170 soldiers in 2013. This marked an end to the two-decade-long hesitance to engage in foreign military engagements. The onset of the so-called refugee crisis of 2015 prompted a major paradigm shift in Germany's—and the EU's—strategic security agenda for Africa. Although most refugees came from Syria and Iraq, curbing irregular migration from Africa through the Mediterranean route became the primary driving force behind then-chancellor Angela Merkel's post-2016 engagement with the African continent. The updated federal guidelines on Africa, launched in March 2019 proclaimed “managing and shaping migration and tackling the causes of refugee movements” to be one of the five objectives of Germany's action in Africa.²⁶

To this end, German civilian and military efforts have increasingly focused on the Sahel region, which sits at the crossroads of several migration routes to Europe. Notably, military engagements in Mali in the context of MINUSMA subsequently

²⁶ Federal Foreign Office, 2019

developed into Germany's largest post-World War II military mission with a peak deployment of 1,200 soldiers in 2018. However, a recent string of coups among central partners in the region has upended Europe's and Germany's designs for the region.

German participation in MINUSMA is coming to an end following the deterioration of relations between the West and Mali's military junta, which has been in power since the 2021 coup. The Malian government's increasingly hostile attitude toward the West and concomitant turn toward the Wagner Group—the notorious Russian mercenary outfit—prompted France to withdraw its troops in 2022 after more than a decade in the country. Germany started to withdraw in May 2023 and completed the total phase-out in December 2023.²⁷ The failure of MINUSMA to bring about stability in the region has resulted in another reversal of Germany's policy approach to the Sahel.

The recent “Sahel-Plus-Initiative” from May 2023, prioritises the contribution of economic aid and partnership programs to peacebuilding and stability efforts.²⁸ However, its implantation has currently been placed on hold following a coup in Niger in July 2023, which ousted the democratically elected government of Mohamed Bazoum. Niger had received substantial military and financial assistance for counterterrorism after emerging as the West's most important strategic partner following the Mali coup and subsequent military withdrawal of European forces. In response to the 2023 Niger coup, Germany has frozen development funds earmarked for Niger. The future of a planned deployment of 60 soldiers to the EU Military Partnership Mission in Niger (EUMPM Niger), which was to serve as a substitute in the Sahel region for the recently suspended European Union Training Mission in Mali (EUTM), is unlikely to go ahead.

Outside of the Sahel region, the German military participates in several other multilateral and UN peacekeeping missions: the counter-piracy military operation at sea off the Horn of Africa and in the Western Indian Ocean Operation Atalanta, formally European Union Naval Force (EU NAVFOR) Somalia; the United Nations Mission for the Referendum in Western Sahara (MINUSRO); the North Atlantic Treaty Organization (NATO) Operation Sea Guardian, a maritime security operation taking place in the Mediterranean Sea; and the UN peacekeeping mission in South Sudan (UNMISS).

The German defence industry has mostly been oriented toward the EU and NATO countries, with the Gulf states emerging as recent major clients. German arms exports to Africa have contributed only slightly more than one-tenth (12.6 per cent) of total arms exports since 2000. The German arms export portfolio to Africa is dominated by three recipients, South Africa (38.5 per cent), Egypt (37.9 per cent), and Algeria (18.4

²⁷ Matthias Gebauer and Marina Korbaki, “Bundeswehr startet Abzug im Juni”, *Der Spiegel* (online), 31 March 2023, <https://www.spiegel.de/politik/deutschland/mali-bundeswehr-startet-abzug-im-juni-a-od34f1a1-7713-455a-9476-13d2a31b3294>

²⁸ Federal Foreign Office, “The Federal Government realigns its Sahel policy”, Press release (Berlin, 03 May 2023), <https://www.auswaertiges-amt.de/en/newsroom/news/-/2595298>

per cent). However, German military equipment deals with Algeria and South Africa date back to 2014 and 2005 respectively, with Egypt being the only major recipient of German arms on the African continent in recent years. In 2021, EUR 4.34 billion — close to half of German arms exports — were destined for Egypt, despite the country's dire human rights record and meddling in deadly regional conflicts, such as in Yemen. The main share of German arms exports to Africa consists of military vessels, such as frigates and submarines, armed personal carriers (APC), and weapons systems, such as surface-to-air missiles (SAM) and short-range air-to-air-missiles (SRAM).²⁹

2.3

Germany's Development Cooperation Profile in Africa

Germany disbursed \$33.3 billion in official development assistance (ODA) in 2021, ranking as the second-largest donor in the world behind the US (\$47.8 billion).³⁰ Africa has increasingly become one of the top priorities of German development cooperation, which is reflected in the substantial increase of German official development assistance (ODA) to Africa in absolute and relative terms. German ODA to Africa rose from \$4.9 billion in 2017 to \$7.1 billion in 2020, contributing 18.9 per cent and 25.5 per cent to Germany's total aid budget respectively.

The figures dropped slightly in 2021, down to \$6.7 billion (24.4 per cent) because of increased spending on multilateral and global initiatives in the context of the COVID-19 pandemic. A slight downward trend in German ODA is expected in the coming years, as the government is intent on reducing spending to return to the debt brake or *Schuldenbremse*, a constitutionally enshrined limitation on government spending.

Germany has taken a broad-based approach to development cooperation with Africa, spreading its contributions across more than 40 partners.³¹ The increasing weight of Germany's development cooperation with Africa is largely driven by contributions to Sub-Saharan Africa and continental initiatives, including contributions to the African Union (AU). Sub-Saharan Africa received almost two-thirds (63.4 per cent) of German ODA to Africa, with close to one-fifth (21.76 per cent) going to North Africa and 14.25

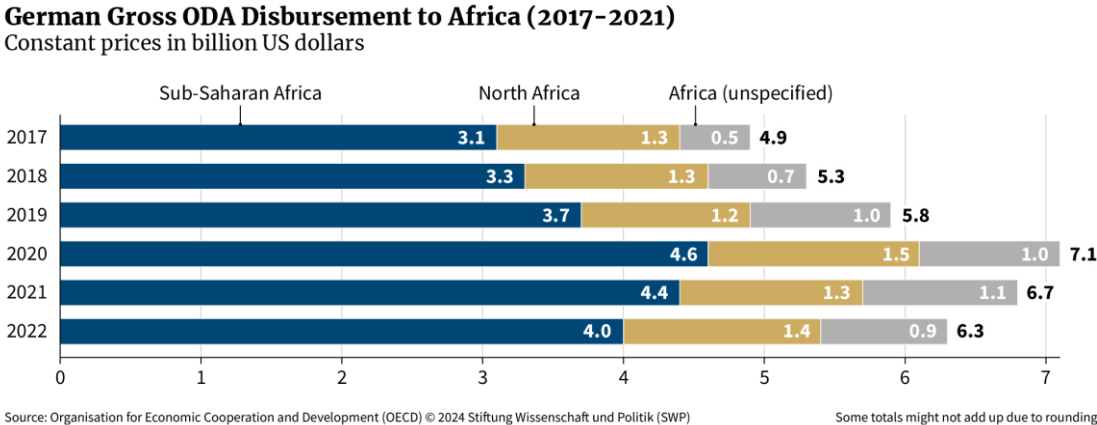
²⁹ Stockholm International Peace Research Institute (SIPRI), SIPRI Arms Transfers Database, Trade register, (Stockholm, 13 March 2023), <https://www.sipri.org/databases/armstransfers>

³⁰ Organisation for Economic Cooperation and Development (OECD), *Total flows by donor [DAC1]* (Paris, 12 April 2023a), <https://stats.oecd.org/>

³¹ Germany has development partnership agreements with 41 African countries. Exceptions include Western Sahara, Gambia, Guinea, Guinea-Bissau, Liberia, Equatorial Guinea, Gabon, Republic of Congo, Central African Republic (CAR), Angola, Botswana, Zimbabwe, Burundi, Eritrea. Federal Ministry for Economic Cooperation and Development (BMZ), *Countries* (Berlin), <https://www.bmz.de/en/countries>

per cent dispensed on continent-wide initiatives.³² However, the North African countries of Morocco (10.4 per cent), Tunisia (10 per cent), and Egypt (4.1 per cent) are Germany’s largest bilateral development partners by share of German bilateral ODA to Africa, although their relative importance has declined somewhat. Germany’s main development partners in Sub-Saharan Africa include Ghana (6.1 per cent in 2021), the Democratic Republic of Congo (4.3 per cent in 2021), and Ethiopia (4.0 per cent in 2021). The latter’s receipts of German ODA have decreased substantially, down from 9.9 per cent in 2020, following the onset of the Tigray war in 2020.

Figure 3³³



German humanitarian assistance is primarily directed toward the Horn of Africa and amounts to \$3.1 billion in multilateral and bilateral initiatives between 2017 and 2021.³⁴ The share of single-country contributions in Germany’s humanitarian aid portfolio has been declining in recent years, as Berlin has prioritised multilateral and regional approaches to humanitarian relief. Somalia, the largest bilateral recipient, received \$500 million in German development assistance (14.8 per cent of German humanitarian aid to Sub-Saharan Africa), South Sudan \$420 million (12.3 per cent), and Ethiopia \$220 million (6.4 per cent). Germany intends to continue its humanitarian engagements in the Horn of Africa and has contributed \$210 million to a \$2.4 billion UN donor fund to provide humanitarian relief to the countries in the Horn of Africa in 2023 and 2024 following the outbreak of the crisis in Sudan in April 2023.³⁵

Germany ties its development cooperation to political conditionalities, which are usually enshrined in a statement of shared goals and commitments. Areas of

³² Organisation for Economic Cooperation and Development (OECD), *Aid (ODA) disbursements to countries and regions [DAC2A]* (Paris, 23 December 2023), <https://stats.oecd.org/>
³³ Author’s calculations based on Organisation for Economic Cooperation and Development (OECD), 2023b
³⁴ Ibid
³⁵ Michelle Nichols “UN gets \$2.4 bln in pledges for Horn of Africa aid efforts”, *Reuters*, 25 May 2023, <https://www.reuters.com/world/africa/un-gets-24-bln-pledges-horn-africa-aid-efforts-2023-05-24/>

conditionality include partner countries' progress on policy reforms, good governance, democracy, and human rights.³⁶ This is particularly evident in the CwA-reform partnerships Germany has entered with 12 African countries since 2017. These are partnerships intended to promote private investment conditions and were built on the idea of amplifying the conceptual link between reform progress and ODA disbursements.

While Germany does not have an official policy on making development cooperation conditional on partner countries' actions to curb irregular migration, this has been applied in practice. One notable example is the partnership between the EU and African countries known as the "EU Emergency Trust Fund for Africa".³⁷ Germany, along with other EU member states, has contributed to this \$5 billion fund, which aims to address the root causes of irregular migration and forced displacement in Africa. Conversely, Germany's development cooperation does not directly benefit German companies, as the northern European country has gone to great lengths to untie its development cooperation from regulatory and administrative hurdles. Berlin has sought to open procurement according to the Organisation for Economic Co-operation and Development (OECD) Donor Assistance Committee's (DAC) recommendations. Less than 20 per cent of projects funded by German grants and loans are awarded to German companies.³⁸

Germany's current development cooperation regime for Africa, enshrined in the BMZ's Africa Strategy launched in January 2023, seeks to ground German-African relations in strategic cooperation among partners.³⁹ The Africa strategy emphasises "Africa's growing weight in the world" and aligns itself with the African blueprint for development—the Agenda 2063 plan. By following Africa's lead on policy priorities, Berlin intends to reiterate Germany's commitment to the Sustainable Development Goals (SDGs). The BMZ document also brings Germany's approach to migration from Africa more in line with the current centre-left government coalition's ambition to attract skilled workers in order to revert the increasing shortage of qualified labour. Instead of combatting the causes of (irregular) migration, German development cooperation will seek to facilitate legal migration from Africa by establishing migrant advisory centres in African partner countries.

³⁶ Federal Ministry for Economic Cooperation and Development (BMZ), *Guidelines for bilateral Financial and Technical Cooperation with cooperation partners of German development cooperation* (Berlin, 01 July 2021), <https://www.bmz.de/resource/blob/92794/7639a6b5542630243f506a36978faaa8/guidelines-for-bilateral-financial-and-technical-cooperation-data.pdf>

³⁷ Kira Schacht, "How Germany manages EU funds in Africa", *Deutsche Welle* (online), 14 April 2022, <https://www.dw.com/en/how-germany-manages-eu-funds-in-africa/a-61375626#:~:text=German%20implementers%20target%20western%20and,with%20German%20participation%20goes%20there>

³⁸ Organisation for Economic Cooperation and Development (OECD), *2022 Report on the Implementation of the DAC Recommendation on Untying Official Development Assistance* (Paris, 05 September 2022), [https://one.oecd.org/document/DCD/DAC\(2022\)34/FINAL/en/pdf](https://one.oecd.org/document/DCD/DAC(2022)34/FINAL/en/pdf)

³⁹ Federal Ministry for Economic Cooperation and Development (BMZ), 2023

Furthermore, the Africa Strategy reflects the recent German orientation toward a value-driven, feminist foreign policy in line with guidelines released by the Foreign Office⁴⁰. Another central element of the strategy is energy cooperation, as the BMZ's seeks to promote the socially equitable and environmentally friendly sustainable transformation of African economies. Germany has created several funding measures for green hydrogen, which will eventually ramp up to approximately \$9.95 billion.⁴¹ Also, Berlin has established two designated hydrogen diplomacy offices Angola and Nigeria in 2022 as part of the German network of foreign commerce chambers in Africa. Finally, the German government is funding demonstration projects in Africa to commence the build-up of local hydrogen capacity in Namibia, Morocco, and Angola.

⁴⁰ Ibid

⁴¹ Kai Imolauer and Maria Uelzen, "Hydrogen Strategy Germany and international positioning: goals and funding programmes", *Rödl & Partner*, 01 September 2022, <https://www.roedl.com/insights/renewable-energy/2022/september/hydrogen-strategy-germany>

3.

German – Turkish Relations: Unavoidable and Volatile

Germany and Turkey share a unique relationship, characterised by both close ties and frequent diplomatic disagreements.⁴² This relationship is reinforced by economic and strategic interdependencies, as well as a large diaspora of around three million people of Turkish origin living in Germany. Although official statements sometimes suggest otherwise, Berlin and Ankara share the mutual recognition of an inevitable bond between the two countries. Germany is Turkey's most important trading partner and one of the country's biggest foreign investors. Bilateral trade between both countries has increased steadily and reached a record high of \$57 billion in 2022.⁴³ More than 8,000 German companies or Turkish firms with German equity operate in Turkey.⁴⁴

The EU-Turkey refugee deal in 2016 was instrumental in former chancellor Merkel's approach to handling domestic political upheaval following the influx of large numbers of migrants to Germany starting in 2015. While it has been controversial in Germany, Turkey, and internationally, the agreement has significantly reduced the number of irregular migrants crossing the border from Turkey to Greece. The current German government seems intent on leaving the agreement intact, despite Berlin's new, value-driven foreign policy under the auspices of Foreign Minister Anna-Lena Baerbock and her Green Party's criticism of the refugee deal prior to the 2021 elections. A continuation of the EU-Turkey refugee deal looks even more likely following Erdoğan's 2023 election victory and the current political dynamics within the EU and Germany on restricting migration to Europe through strategic partnerships on cross-border mobility with neighbouring countries.⁴⁵

⁴² Federal Foreign Office, *Bilateral Relations with Turkey* (Berlin, 11 October 2023), <https://www.auswaertiges-amt.de/en/ausserpolitik/laenderinformationen/tuerkei-node/turkey/228290>

⁴³ Statistisches Bundesamt (Destatis), *Türkei: Statistisches Länderprofil* (Wiesbaden, 08 June 2023), https://www.destatis.de/DE/Themen/Laender-Regionen/Internationales/Laenderprofil/tuerkei.pdf?__blob=publicationFile

⁴⁴ Federal Foreign Office, 2023

⁴⁵ Council of the EU, "Migration policy: Council reaches agreement on key asylum and migration laws", Press release (Brussels, 08 June 2023), <https://www.consilium.europa.eu/en/press/press-releases/2023/06/08/migration-policy-council-reaches-agreement-on-key-asylum-and-migration-laws/#:~:text=22%3A50->

Nonetheless, ample lines of disagreement continue to exist between Germany and Turkey. Germany has expressed concerns over Turkey's rule of law and human rights record, particularly with President Erdoğan's increasingly authoritarian turn. The Turkish government's crackdown on prominent dissidents and civil society in general, the withdrawal from the Istanbul Convention, military actions against the Kurds in Iraq, and Turkey's controversial and deadly engagement in Syria have also strained the relationship. Conversely, Turkey has not forgotten about Germany's pivotal role since 2013 in blocking new rounds of accession talks in response to Erdoğan's increasingly repressive approach to internal opposition, the curtailing of civil liberties, and the lack of progress in Ankara's normalising relations with Cyprus, an EU member.

Although Turkey remains an important partner in the European security order, relations between Turkey and several EU member states have grown increasingly tense since the abandonment of accession talks in 2013. Ankara's new geopolitical imperative of an independent foreign policy has produced a more assertive stance on regional security issues in North Africa and the Middle East. Its aggressive foray into contested hydrocarbon exploration zones has intensified pre-existing disagreements with Greece, Cyprus, and France. In seeking to protect the special relationship with Turkey, Germany has remained the strongest advocate for an accommodating approach toward Turkey and played a pivotal role in thwarting an initiative by a group of EU states led by France to impose sanctions on Turkey in response to the Aegean dispute in 2020.⁴⁶

Geopolitically, Germany perceives Turkey as a strategically important but unreliable partner due to its quest for autonomy and transactional approach to foreign policy under Erdoğan. This is exemplified in Ankara's ambiguous overtures to Russia in the wake of Moscow's illegal invasion of Ukraine. On the one hand, Turkey has joined its NATO allies in condemning the invasion and demanding the restoration of Ukraine's territorial integrity, even going so far as to provide Ukraine with critical military support in the form of drones. On the other, Ankara has opted out of the sanction regime against Russia, maintains diplomatic relations with Moscow, and has deepened economic ties with the Eurasian country. Turkey's geopolitical strategic considerations are driven both by necessity and opportunity. Economically, Turkey depends on Russian imports, in particular in energy and grain.⁴⁷ Given the dire state of the Turkish economy, Ankara can only afford to substitute Russian imports at great costs and has instead opted to exploit the current situation by offering sanctuary to

, Migration%20policy%3A%20Council%20reaches%20agreement%20on%20key%20asylum%20and%20migration, asylum%20and%20migration%20management%20regulation

⁴⁶ Günter Seufert, *Germany's New Government and Its Foreign Policy on Turkey: Lines of Conflict and Areas of Cooperation*, SWP Comment 2021/C 55 (Berlin: Stiftung Wissenschaft und Politik [SWP], 25 October 2021), <https://www.swp-berlin.org/publikation/germanys-new-government-and-its-foreign-policy-on-turkey-lines-of-conflict-and-areas-of-cooperation>

⁴⁷ Galip Dalay, *Deciphering Turkey's Geopolitical Balancing and Anti-Westernism in Its Relations with Russia*, SWP Comment 2022/C 35 (Berlin: Stiftung Wissenschaft und Politik [SWP], 20 May 2022), https://www.swp-berlin.org/publications/products/comments/2022C35_Turkey_RelationsRussia.pdf

sanctioned Russian businesses desperate for international markets. Furthermore, Ankara has leveraged its influence in the West's alliance against Russia to satisfy domestic priorities. Up until summer 2023, Erdoğan stalled the NATO bids of Sweden and Finland to extract concessions from both countries in their relationship with the Kurdistan Workers' Party (PKK), which is banned in Turkey.⁴⁸

⁴⁸ Ben Hubbard and Safak Timur, "Talks in Turkey on Sweden's bid to join NATO end with no progress reported.", *New York Times* (online), 14 June 2023, <https://www.nytimes.com/2023/06/14/world/europe/erdogan-turkey-sweden-nato.html>

4.

German Perspectives on Turkey's Rise in Africa

Turkey is a relatively new player in the concert of global actors in Africa. In recent years, Turkey has dramatically increased its long-standing economic, cultural, and political ties with the countries of North Africa and sought to extend its reach to other regions of Africa. The enlargement of Turkey's footprint in Africa kicked off in 1998 with the launch of the "African Action Plan in 1998". Although bilateral relations were gradually institutionalised in the following years, it was not until Ankara's declaration of the "Year of Africa" in 2005 that Turkey's strategy gained momentum. This was followed by the first Turkey Africa Partnership Summit in 2008, which has been held every five years since then and the AU's acceptance of Turkey as a strategic partner. Turkey has followed an autonomous and idiosyncratic approach to engaging African countries by employing a coordinated strategy of soft and hard power.

Ankara's strategic approach to the continent offers African countries the chance to diversify their partnerships beyond the dominant duality of Western countries and China. Africa's discontent with Europe's paternalistic approach to Africa has grown increasingly vociferous in recent years, as many African countries see relations with Europe as exploitative, lacking in mutual benefit, and failing to incorporate African perspectives. Primarily, this applies to the former French colonies and their exasperation with the frequent political meddling of their former coloniser. The disastrous French actions in the Sahel and Libya have amplified anti-French and, through association, anti-Western sentiments. However, Western countries are not alone in facing image problems in Africa.

China, which enjoyed enormous growth in economic and political influence in Africa for over a decade, has started to face occasional resentment and resistance from African countries. African criticisms of the Chinese approach are directed at China's debt-financing model, which is perceived as dependency-building, and its vertically integrated construction sector, which does not generate African employment and often produces short-lived results.⁴⁹ Turkey, on the other hand, does not tie its development assistance to political conditionalities, unlike the West, and does not

⁴⁹ Alex Vines, Creon Butler and Yu Jie, *The response to debt distress in Africa and the role of China* (London: Chatham House, December 2022), <https://www.chathamhouse.org/2022/12/response-debt-distress-africa-and-role-china/02-case-studies-chinese-lending-africa>

create dependencies based on financial loans, as China does. Instead, it offers a world-renowned construction sector and sought-after military equipment—which Western countries are hesitant to provide. Furthermore, Turkey has proven adept at leveraging shared religious and cultural ties as well as its former status as a developing country to establish bilateral partnerships on equal footing.

Ankara's ascent as a relevant actor in Africa comes at a time when European leaders are increasingly concerned over their waning influence in Africa. The rise of China, Russia, and the middle powers, such as Turkey, the UAE, and India, has presented African governments with new partnership opportunities and disrupted the status quo. African leaders have grown more assertive in promoting their interests and demanding mutually beneficial relations. This occurs against the backdrop of an intended shift in Germany's foreign policy paradigm following Russia's illegal invasion of Ukraine and Chancellor Scholz's subsequent *Zeitenwende* proclamation in 2022.

The German response to new powers in Africa has manifested itself in increased diplomatic outreach, new ministerial strategies, and lofty rhetoric. In practice, however, Africa still does not feature prominently in German political discourse. Hence, few in Berlin's political community have been exposed to relevant existing and emerging topics concerning Africa, including Turkey's activities on the continent. This is true even in the case of key ministerial officials to Germany's Africa policy.⁵⁰ A detailed and coherent picture of Turkey's engagements in Africa has yet to develop in Germany. So far, reactions to Turkey's African engagement in Germany's economic, political, and security communities have ranged from unaware ambivalence to highly engaged; from welcoming to concern.

4.1

Economic Relations

Turkey has sustained a remarkable expansion of its economic footprint in Africa in recent decades. Bilateral trade between Turkey and African countries has increased sevenfold from \$4.09 billion in 2000 to \$29.45 billion in 2021.⁵¹ Likewise, Turkish direct investment has grown steadily from around \$100 million in 2000 to \$1.6 billion in 2021.⁵² Ankara has adopted an integrated approach to promoting its economic interests with African countries, with the Erdoğan-led government advocating for Turkish business interests in bilateral diplomatic exchanges and sponsoring recurrent

⁵⁰ Author's interview with an official of German ministry, March 2023

⁵¹ Hürcan Aslı Aksoy, Salim Çevik and Nebahat Yaşar, *Visualizing Turkey's Activism in Africa* (Berlin: Centre for Applied Turkey Studies [CATS], 03 June 2022) <https://www.cats-network.eu/topics/visualizing-turkeys-activism-in-africa>

⁵² Ibid

Turkey–Africa summits. A central aspect of Turkey’s approach is its emphasis on economic sectors with clear outputs, which have boosted Turkey’s standing on the continent. Turkish Airlines serves 62 African destinations in 41 African countries, as Istanbul has become the major hub for intercontinental flights to and from Africa.⁵³

However, the primary catalyst of Turkey’s economic agenda rests in its globally competitive construction sector, which is structurally well-positioned to capitalise on Africa’s infrastructure boom. This is also reflected in Turkey’s export regime with Africa, which is dominated by building materials such as cement and steel. Turkish exporters have also gained a foothold in African markets for machinery and textiles. In turn, Turkey mainly receives energy inputs from African countries. Due to historical and cultural ties, North Africa continues to serve as the main focal point of Turkey’s economic endeavours. The expansion into the rest of Africa has primarily been oriented toward West Africa and the Horn of Africa. Turkey’s economic expansion has not been without controversy, as African countries have complained about Turkey’s growing trade surplus, which has surged by 291 per cent between 2005 and 2020, and its penchant for the vertical integration of manufacturing supply chains in construction and textiles, such as in the case of the \$ 1.5 billion TAYAL textile complex in Algeria where the Turkish producer TAYAL controls all textile production in the north African nation from raw materials to finished product.⁵⁴

German economic circles have started to pay closer attention to Turkey’s economic activities. Turkey’s economic advances in Africa are cited in media outlets and discussed in specialised sessions at German business councils. In part, this is due to the apparent nature of Turkey’s economic outreach. Notably, Turkish Airlines serves as the most prominent—and sometimes only—point of interaction with Turkey’s presence for German officials and business representatives in Africa.⁵⁵ This rise of Turkish Airlines in Africa is mostly viewed in a positive light, as the carrier is considered both reliable and comfortable. Furthermore, Turkey’s coordinated and assertive approach to promoting its economic interests and national businesses has contributed to heightening the discontent of German businesses with their own government. German company leaders often cite a lack of government support as a key obstacle to expanding their business activities in Africa. The visibility of Turkey’s activities in Africa, such as the frequent major summits, diplomatic initiatives, and extensive government lobbying evoke in some German business people a sense of envy.⁵⁶ However, Turkey’s specific economic activities in Africa have provoked few concrete reactions in Germany. The most likely explanation for this is that, for now,

⁵³ “Turkish Airlines increase number of destinations in Africa to 62”, *BusinessTurkey* (online), 04 June 2022, <https://businessturkeytoday.com/turkish-airlines-increase-number-of-destinations-in-africa-to-62.html>

⁵⁴ Michael Tanchum, *Turkey’s Maghreb–West Africa Economic Architecture: Challenges and Opportunities for the European Union* (Berlin: Centre for Applied Turkey Studies [CATS], June 2021), <https://www.swp-berlin.org/en/publication/turkeys-maghreb-west-africa-economic-architecture-challenges-and-opportunities-for-the-european-union>

⁵⁵ Author’s interview with a representative of a German business association, January 2023

⁵⁶ This was stated in multiple interviews with German business associations and councils, 2023.

Turkey mostly does not compete with German economic interests in Africa in scale or scope.⁵⁷

Despite the dramatic increase in Turkish trade and investment with Africa, Germany continues to carry considerably more economic weight on the continent. In 2021, Germany's trade volume with Africa in 2021 (\$58.4 billion) was almost twice as high as that of Turkey (\$29.5 billion).⁵⁸ The discrepancy in investment levels is even larger, as Turkey's FDI stocks in Africa in 2021 (\$1.6 billion) amounted to less than 15 per cent of German FDI to Africa (\$11.5 billion). Germany's trade regime benefits from EU membership, which entails access to more than 30 free trade agreements (FTAs) with African countries, freeing most of the German trade with Africa from customs and import duties. Turkey only has four FTAs with African countries (Egypt, Mauritius, Morocco, and Tunisia), which puts its companies at a serious disadvantage, in particular in Sub-Saharan Africa.⁵⁹ This is compensated to some degree by the Lira's devaluation since 2018, which has made Turkish exports more affordable, and the Turkish government's extensive efforts to promote its business interests through comprehensive diplomatic efforts.

However, as mentioned before, Turkey's growing economic footprint is not perceived as a threat as leading German business associations specialising in foreign trade and trade with Africa report no known instances of Turkish and German companies competing over African business.⁶⁰ In part, this is due to Turkey's limited economic presence in many markets in Sub-Saharan Africa and Germany's geographically concentrated economic interests in Africa. Germany and Turkey have focused on different export products and market segments in Africa. While Germany primarily exports cars and car parts, as well as industrial and chemical products, Turkey's main exports to Africa are agricultural products, consumer goods, and building materials.⁶¹ Furthermore, Turkish and German companies generally target different price and quality segments. For example, Turkey has increasingly exported agricultural machinery products, such as milling equipment, to markets with vested German interests in East Africa. The milling equipment produced by Turkish company Alapala was perceived to be of good quality and offered at an affordable price. However, rather than competing with German exports in milling equipment over market share, Turkish products were considered complementary to existing offers by filling the niche between cheaper Chinese and higher-priced German products.⁶²

⁵⁷ This was confirmed in interviews with members of the Foreign Office and with German business associations, January-March 2023.

⁵⁸ Hürcan Aslı Aksoy, Salim Çevik and Nebahat Yaşar, 2022

⁵⁹ Ibid

⁶⁰ Author's interview with a representative of a German business association, January 2023

⁶¹ Michael Tanchum, 2021

⁶² Ulrich Binkert, Gut verpackt: Maschinen in Top-Qualität für afrikanische Kunden, *Africa Business Guide*, 09 July 2021, <https://www.africa-business-guide.de/de/praxis/erfahrungen/maschinen-in-top-qualitaet-fuer-afrikanische-kunden-696910#:~:text=Der%20Engl%C3%A4nder%20Mark%20Wild%20verkauft,zum%20Beispiel%20M%C3%B6rtel%20und%20Fliesenkleber>

Turkish activities in Africa's infrastructure sector have generated notable interest in Germany.⁶³ Africa's infrastructure market has become increasingly significant, reaching an annual project value of \$521 billion in 2021.⁶⁴ However, many German and European companies have mostly abandoned Africa's infrastructure sector, as they were unable to compete with their state-backed Chinese counterparts. In 2021, China accounted for 31 per cent of the African construction market, while the market share of Western companies had dropped from 37 per cent in 2013 to 12 per cent in 2021.⁶⁵ Turkey, on the other hand, has managed to position its construction sector as a competitive alternative to Chinese companies by drawing on the technical superiority of its internationally established market leaders and extensive lobbying efforts. Turkey's push into the African infrastructure market has increasingly included projects in Sub-Saharan Africa, with notable projects in Senegal, Niger, and Rwanda.⁶⁶ In East Africa, Turkish company Yapi Merkezi beat the Chinese competition to win several contracts for major railway projects in Ethiopia, Tanzania, and Uganda.⁶⁷ In 2020, projects in Africa made up around 17 per cent of all Turkish infrastructure projects abroad.

German construction companies are facing significant challenges to regain lost ground in Africa's infrastructure sector but Chinese influence in Africa's infrastructure industry remains a central obstacle. Chinese construction companies almost exclusively rely on Chinese firms at all project stages.⁶⁸ Furthermore, German companies are wary to enter collaborative arrangements with Chinese firms due to the different labour standards. German and Turkish construction firms, on the other hand, possess complementary skill sets, with Germany bringing technical and engineering expertise and Turkey offering cost competitiveness and adaptability.⁶⁹ The mutual beneficial aspects of this combination are increasingly being recognised, in particular in the energy sector. German-Turkish joint venture Borusan EnBW Enerji, in which German EnBW and Turkish Borusan are equal partners, operates a variety of renewable energy plants with a total generation capacity of 720 megawatts (MW) and is one of the leading actors in Turkey's on-shore wind market.⁷⁰ In 2021,

⁶³ Author's interview with multiple representatives of a German business association, Zoom, February 2023

⁶⁴ Deloitte, *Africa Construction Trends Report 2021* (Berlin, 05 April 2022), <https://www2.deloitte.com/za/en/pages/energy-and-resources/articles/africa-construction-trends-2021.html>

⁶⁵ Ibid

⁶⁶ "Turkish builders are thriving in Africa", *The Economist* (online), 07 May 2022, <https://www.economist.com/business/2022/05/07/turkish-builders-are-thriving-in-africa>

⁶⁷ Philipp Sander, Emmanuel Lubega Kampala and Burak Ünveren, "Uganda unplugs from China railway project", *Deutsche Welle* (online), 19 January 2023, <https://www.dw.com/en/uganda-unplugs-from-china-railway-project/a-64445942>

⁶⁸ Ulrich Binkert, China baut in Afrika. Fragen und Antworten für deutsche Anbieter, *Germany Trade and Invest [GTAI]*, March 2020, <https://www.africa-business-guide.de/resource/blob/893966/66a34577a6ad9fd140b397f8e41bd9bd/studie-china-baut-in-afrika-data.pdf>

⁶⁹ "Turkey-Germany can make joint investments in Africa, Middle East", *Daily Sabah* (online), 18 October 2021, <https://www.dailysabah.com/business/economy/turkey-germany-can-make-joint-investments-in-africa-middle-east>

⁷⁰ EnBW, *Borusan EnBW Enerji commissions 138 Megawatt Saros wind farm* (Baden-Württemberg, 26 July 2022), <https://www.enbw.com/company/press/borusan-enbw-enerji-puts-wind-farm-into-operation.html>

Turkish ENKA and German Siemens joined forces in the implementation of a 650 MW power plant in the city of Misrata, Libya.⁷¹ Examples such as these showcase that cooperation between German and Turkish construction companies in Africa is viable and already happening—this could strengthen the coordination of German and Turkish interests in Africa, increase the attractiveness of companies from both countries in Africa’s competitive infrastructure sector, and boost Germany’s goal of promoting Africa’s renewable energy sector.

A potential point of friction between Berlin and Ankara are both countries’ stakes in North Africa’s economic, security, and energy architecture.⁷² Germany relies on energy imports from North Africa (from Algeria, Libya, and Egypt) to satisfy growing domestic demand. Furthermore, the region’s renewable energy potential is attractive to Germany’s decarbonization strategy. Turkey has used its historic, religious, and cultural ties with the region to expand its political influence and aims to expand its position in the North African energy corridor. North Africa presents an opportunity for Turkey to secure energy supplies and establish energy trade routes. This holds the potential for conflict, as both countries may compete to participate in major energy projects, such as pipeline construction and liquefied natural gas terminals. Additionally, securing exploration and production rights, as well as access to lucrative contracts may lead to intensified competition. While a direct confrontation between Germany and Turkey over energy resources in North Africa has yet to occur, the simmering conflict between the EU and Turkey over access to mineral exploration rights in the Eastern Mediterranean highlights the potential for conflict.

4.2

Defence and Security

Turkey's security footprint in Africa has been steadily expanding in recent years using a combination of military engagements, defence cooperation agreements, and arms sales.⁷³ Currently, Turkey operates military bases in Somalia and Libya, where it has intervened directly in ongoing conflicts, and provides military training and capacity-building services to government forces. This is compounded by defence cooperation agreements with 30 African countries. Notably, Turkey's growing presence in the African arms market since the mid-2010s has garnered significant attention. More than 15 African states now operate Turkish armoured vehicles. Interest in Turkish Bayraktar TB-2 combat and surveillance drones has skyrocketed following their use in the Syrian, Libyan, Nagorno-Karabakh, and the war in Ukraine. Turkish drones have

⁷¹ Sami Zaptia, “ENKA and Siemens receive Misrata 650 MW power station work site – start construction project”, *Libya Herald* (online), 21 July 2021, <https://libyaherald.com/2021/06/enka-and-siemens-receive-misrata-650-mw-power-station-work-site-start-construction-project/>

⁷² Author’s interview with a representative of a German political foundation, February 2022

⁷³ Hürcan Aslı Aksoy, Salim Çevik and Nebahat Yaşar, 2022

already been delivered to Morocco, Libya, Ethiopia, Somalia, Niger, Togo and Burkina Faso.⁷⁴

Germany and Turkey have vested interests in guaranteeing regional stability in North Africa, but do not share the same motivations. Next to economic, developmental, and energy agendas, Berlin has a strong interest in North African stability, which is closely tied to German (and EU) security concerns. Cooperation with the North African countries on migration management is a cornerstone of the EU's border management regime and its strategy to reduce irregular migration across the Mediterranean. Turkish interest in North African stability mostly serves to protect and leverage its vested economic interests in the region, in particular in Libya and Algeria, as well as in its aspiration to cement its status as a regional power. Whereas Germany primarily relies on its EU partners, multilateral alliances, and diplomatic initiatives to promote its security interests in the region, Turkey adopts a more assertive approach based on bilateral alliances and at times resorts to military intervention.

This was evident in both countries' competing approaches to the Libyan Civil War from 2019 onwards. German diplomatic efforts, in close coordination with the UN, produced the Berlin Declaration framework in January 2020. The agreement was short-lived, however, as Turkey opted to violate the agreement by breaking Khalifa Haftar's advance on Tripoli with military intervention, effectively ending the war. Since then, significant Turkish military support to the UN-recognized Government of National Accord (GNA) and the superseding Government of National Unity (GNU) has been vital to upholding the stalemate between competing Libyan factions.⁷⁵ While Germany's official response consisted of subdued criticism of Turkey's military intervention, German political circles responded with relief to the prevention of a Haftar victory, the return to stability—at least for now—and the continued existence of a partner to European migration management efforts.⁷⁶ Nonetheless, German officials remain concerned over the threats to long-term stability posed by continued Turkish military meddling and the presence of Turkish-sponsored Syrian mercenaries.⁷⁷

Furthermore, Turkey managed to leverage its growing influence to directly challenge EU interests in the Eastern Mediterranean. The ongoing episode has heightened friction between Turkey and some EU member states. In 2019 Turkey and Libya signed a preliminary deal establishing a maritime exclusive economic zone with the former

⁷⁴ Kate Hairsine and Burak Ünveren, "Turkey deepens its defense diplomacy in Africa", *Deutsche Welle* (online), 28 October 2022, <https://www.dw.com/en/turkey-deepens-its-defense-diplomacy-in-africa/a-63586344#:~:text=Turkey%20is%20stepping%20up%20its,exports%20to%20Africa%20have%20exp%20loaded>

⁷⁵ Wolfram Lacher, *Libya's Flawed Unity Government*, SWP Comment 2021/C 29 (Berlin: Stiftung Wissenschaft und Politik [SWP], 22 April 2021), <https://www.swp-berlin.org/10.18449/2021C29/>

⁷⁶ Author's interview with a representative of a German political foundation, Zoom, February 2022

⁷⁷ Michael Ohnmacht, cited in "Germany and Europe hold unified position on mercenaries exit of Libya, says ambassador", *The Libya Update* (online), 01 January 2023, <https://libyaupdate.com/germany-and-europe-hold-unified-position-on-mercenaries-exit-of-libya-says-ambassador/>

Tripoli-based GNA infringing on Greek and Cypriot territorial claims. Germany—which has no interest in exploration in the area—was able to temporarily resolve escalating tensions between the EU and Turkey by adopting a conciliatory approach and successfully preventing EU sanctions on Turkey.⁷⁸ Ankara's renewed attempts to ratify the GNU deal in 2022 and 2023 resulted in tensions flaring once more and drew widespread condemnation from European countries, including from Germany.⁷⁹

Turkey's increasing role in the provision of military equipment to African countries⁸⁰ has drawn ambiguous reactions in Germany. This is not a question of competition, as Germany itself is in the process of retreating from military commitments and arms sales to African countries have mostly ebbed off.⁸¹ Rather, Turkey has made the sale of military equipment, in particular cheap, easy-to-use, and effective drones a central feature of its foreign policy. This has allowed Turkey to establish and strengthen relationships with multiple African countries, including autocracies in conflict scenarios. From the perspective of some German defence industry leaders, Turkish drones fill a demand Germany is incapable of servicing and have played a bloody, but integral part in promoting stability in Libya and the Sahel, where Turkish drones have been employed in counter-terrorist operations. And yet German policymakers see that African governments' desire for Turkish drones ultimately may reduce German and European influence in strategic security scenarios. Furthermore, Turkish drones in the hands of authoritarian governments have disastrous consequences in the humanitarian realm. In Ethiopia, Turkish drones enabled government forces to rapidly turn the tide against rebels from the Tigray People's Liberation Front, which governed the country for nearly three decades before 2018. The damage caused by the indiscriminate use of drones throughout Tigray prompted the UN High Commissioner for Human Rights Volker Türk to issue a statement describing the civilian toll as “utterly staggering”.⁸²

⁷⁸ Günter Seufert, 2021

⁷⁹ Aparna Shandilya, “Germany's Scholz Urges Turkey To Exercise Restraint Towards Greece As Tensions Escalate”, *Republic world* (online), 02 June 2022, <https://www.republicworld.com/world-news/europe/germanys-scholz-urges-turkey-to-exercise-restraint-towards-greece-as-tensions-escalate-articleshow.html>

⁸⁰ Nebahat Tanrıverdi Yaşar, *Unpacking Turkey's Security Footprint in Africa*, SWP Comment 2022/ C 42 (Berlin: Stiftung Wissenschaft und Politik [SWP], 30 Juni 2022), <https://www.swp-berlin.org/10.18449/2022C42/#:~:text=So%20far%2C%20Turkey%20has%20signed,%2C%20cooperation%2C%20and%20joint%20production>

⁸¹ Author's interview with a member of Federal Foreign Office, February 2023

⁸² Joshua Dunne, “Turkish drones are destroying Ethiopia's promise of peace”, *Australian Strategic Policy Institute*, 25 October 2022, <https://www.aspistrategist.org.au/turkish-drones-are-destroying-ethiopias-promise-of-peace/#:~:text=The%20damage%20they%20have%20wrought,to%20any%20conflict%3A%20cost%20aversion>

4.3

Development Cooperation

Development cooperation forms an integral aspect of Turkey's political agenda and self-portrayal in Africa. The Turkish Cooperation and Coordination Agency (TIKA), the Turkish development arm, has established offices in 22 African countries and provides classic development services in areas such as agriculture, education, water, and sanitation. Turkey claims to follow an idiosyncratic model of development that does not attach conditionality to development assistance and refrains from providing potentially dependency-building financial loans to African countries. The image that Ankara likes to cast is that this represents a third approach to aid and development in which the project of liberal modernity itself has been turned on its head and reinvented from the Global South.⁸³ Turkey, however, is not a major donor. In 2021, Turkey provided \$99 million in ODA to Africa. In 2020, African countries only received 0.9 per cent of Turkish ODA. And while Turkey's development assistance comes without political or economic conditionalities, Ankara has been adept at leveraging its development contributions as a soft power tool in its bid to open African markets to Turkish exports, access critical resources, and support its regional leadership ambitions. This has been particularly evident in Somalia, the only African country with a substantial Turkish development presence. In the past decade, Turkey has provided around \$1 billion to Somalia, mostly in the form of humanitarian assistance. Nonetheless, Ankara has won Somalia as a close political and military ally on the Gulf of Aden, established a military camp in the country, and reportedly gained access to exploration rights in Somalia's maritime zone.

From the German perspective, Turkey's actual contribution to Africa's development sector is barely noticeable. In 2021, German ODA to Africa amounted to \$6.7 billion.⁸⁴ Many in German development circles are unaware of Turkey's engagement in development in Africa and have rarely encountered their Turkish counterparts on the continent.⁸⁵ Even in Somalia and the Horn of Africa, Germany's contributions vastly outscale those of Turkey. While Germany has increasingly turned to multilateral initiatives to implement its development agenda, Turkey has maintained its preference for bilateral ODA, which is more visible and easier to leverage for political impact. This has been accomplished with striking success.

Turkey's activities in Africa's development sector have not directly challenged German interests, but African countries' positive reception of its development model

⁸³ Sean David Hobbes, *The Turkish Olympics: Festival into the Gulen movement* (Cairo: The American University in Cairo, Master's Thesis, September 2016), <https://fount.aucegypt.edu/etds/583/>

⁸⁴ Organisation for Economic Cooperation and Development (OECD), 2023b

⁸⁵ Author's conversation with members of German development cooperation agency and ministerial representatives, February 2023

highlights the shortcomings of Germany's. The new Africa Strategy by the BMZ seeks to redress the perceived flaws of Germany's traditional model of development cooperation with Africa by emphasising mutually beneficial partnerships and African ownership. However—the strategy also reflects Germany's value-based foreign policy, especially in the adoption of a feminist approach to foreign policy—which can produce contradictions in dealing with partner countries with different social and political beliefs. Germany's tendency to condition development cooperation on shared social and political values has been criticised as paternalistic by African governments in the past.⁸⁶

⁸⁶ Benedikt Erforth and Lena Gutheil, *The New Africa Strategy of Germany's Ministry for Economic Cooperation and Development: More Self-Critical, Credible and Values-Based?*, Megatrends Spotlight 21 (Berlin: Megatrends Afrika, 07 February 2023), <https://www.megatrends-afrika.de/en/publication/mta-spotlight-21-the-bmzs-new-africa-strategy>

5.

Ankara's African Engagements in the context of Geopolitics

Germany's perception of Turkey's emerging role in Africa must be viewed in the context of Germany's and the EU's geostrategic considerations following the Russian invasion of Ukraine in 2022. Africa is increasingly recognised as a central venue of geopolitical competition over future markets, resources, and strategic partnerships. Germany currently finds itself recalibrating its approach to Africa, having recognized that the past models of engagement are insufficient to convince African countries to enter deeper economic and political partnerships in the current geopolitical climate. China, Russia, and rising middle powers have adopted comprehensive strategies to increase their economic and security footprints on the continent. As partnership options of self-assured African countries have increased, the economic and political influence of established powers has declined.

Germany and the EU see themselves primarily in geostrategic competition with China and Russia.⁸⁷ China's meteoric infrastructure and credit-fuelled push into Africa have challenged European interests across the entire continent. European leaders fear that the Chinese model, embodied in the BRI, is designed to build dependencies that can be leveraged for access to critical resources and strategic infrastructure. Russia does not have a significant economic footprint in Africa, but its military and arms sales to authoritarian regimes and groups shunned by European countries pose a threat to democracy, peace, and stability in Africa. Berlin recently experienced this first-hand in Mali, where Russia's involvement put the final nail in the coffin of the faltering German and European-backed military mission. European leaders' fear of losing influence in Africa was further aggravated when many African countries refused to support or abstain from the votes to condemn Russia's invasion of Ukraine at the UN General Assembly in 2022.

Turkey's footprint in Africa is considerably smaller in scale than that of China and Russia. It is also less ambiguous. Consequently, Ankara's African activities have not attracted a large degree of attention in Berlin. Yet the emergence of Turkey as an

⁸⁷ Fonteh Akum and Denis Tull, 2023

influential actor in Africa has produced ambivalent reactions in Germany's political community. On the one hand, Turkey is a NATO member and Germany's closest ally among the rising powers. Cooperation based on established ties and shared economic and strategic interests in African affairs could make Turkey an effective partner in countering Chinese and Russian influence.⁸⁸ Furthermore, Berlin is increasingly aware that it must offer more to convince African countries to deepen their partnership with Germany. Germany and the EU's asymmetrical relationship with Africa, and the EU's heavy emphasis on migration control have contributed to anti-western sentiment in the continent and eroded trust. In Africa, Turkey has built a reputation as an anti-imperial and anti-colonial actor that shares many African ambitions for changing the international order. A closer relationship with Turkey in Africa could benefit German attempts at rebuilding trust with African leaders.

On the other hand, Turkey has been an unreliable and confrontational partner for Germany in the past. Since the breakdown of EU accession talks in 2016, Turkey has followed an assertive and independent foreign policy which has at times challenged German and European interests. Should German and Turkish policy aims in Africa diverge, it is unlikely that Turkey will back down unless presented with an alternative political sacrifice. In the past, Turkey has demonstrated its willingness to leverage its assets to extract political capital in pursuit of its national agenda. Potential sources of friction could occur along the lines of Ankara's drone diplomacy and growing influence in North Africa and the Sahel—which are important strategic regions for Germany's and the EU's migration control regimes.

Nonetheless, the ascent of an additional actor vying for influence in Africa has compounded German and European fears about their respective roles on the continent and highlighted the shortcomings of Germany's strategic engagement.⁸⁹ Germany failed to make any substantial economic advances despite multiple initiatives and is currently overseeing the withdrawal of its only major military mission in Africa. Turkey—despite deploying fewer resources—has witnessed a manyfold increase in economic influence, expanded its diplomatic reach, and established military footholds in multiple countries. This is due to Ankara's coordinated strategy in Africa which emphasises highly visible activities, leverages both soft and hard power, and heavily interlinks economic, political, diplomatic, and security dimensions. Turkey's high-ranking state visits and Africa Summits have contributed greatly to improving Turkey's reputation on the continent.⁹⁰ Consequently, some in Germany's African community are pointing to Turkey's approach to Africa to highlight the importance of effective policy coordination and government support in the promotion of national interests in Africa.

⁸⁸ Author's interview with a representative of a German political foundation, February 2022

⁸⁹ This was raised in multiple interviews by the author with representatives of German development cooperation, German political foundations, and German business associations, February–March 2023.

⁹⁰ Emel Parlar Dal and Samiratou Dipama, *Assessing Turkey–Africa Engagements*, Policy Brief (Berlin: Africa Policy Research Institute [APRI], 27 April 2023), <https://afripoli.org/assessing-turkey-africa-engagements#:~:text=Turkey's%20activities%20in%20Africa%20have,unique%20actor%20on%20the%20continent>

6.

The Future of German–Turkish Relations in Africa

Turkey's presence in Africa has grown rapidly in recent years. However, in terms of scale, Turkey's development and economic engagements do not pose a challenge to German and EU interests. This may change as Turkey aspires to increase its economic reach on the African continent, but German companies' Africa business remains unaffected for now. Turkish development cooperation and humanitarian efforts have increased significantly in recent years but remain tiny in comparison to Germany's enormous, continent-wide development agenda. Furthermore, Turkey's domestic situation following the devastating earthquake in February 2023 and intensifying economic and currency crises cast doubt over the country's ability to sustain its growth in economic activities and development spending in Africa.

Turkey's growing security footprint in North Africa, the Sahel, and the Horn of Africa has reduced Western influence in these regions. Turkish arms sales have increased Ankara's standing with countries to which the EU and Germany are unwilling to sell military equipment. Furthermore, the Turkish intervention in Libya may have temporarily ended the war and averted the disastrous outcome of a Haftar victory, but the continued deployment of Syrian mercenaries to the country further threatens the stability of an already volatile country.

EU-Turkish relations have considerably deteriorated over the Eastern Mediterranean dispute. Some member states, especially France, have developed an increasingly hostile relationship toward Turkey. Germany, which has close economic ties to Turkey, has adopted a more accommodating approach. France and Germany have found themselves to be increasingly at odds over their respective approaches to Ukraine and China. The Franco-German alliance also suffered from growing German disillusionment with the disastrous French policy toward Libya and the Sahel. In Libya, France escalated the conflict by clandestinely supporting Khalifa Haftar's rise while simultaneously recognizing the GNA. In Mali, French policy blunders contributed to the deterioration of relations with the Malian government and eventual failure of European efforts in the Sahel. France's frequent interventions in the

political affairs of its former colonies stoked anti-French and, by association, anti-European sentiments.

In recent years, Germany has taken on a more active role in EU Africa affairs. The German government intends to promote EU efforts to improve relations with African partners by offering better conditions for the continent's integration into global value chains and deepening regional value chains.⁹¹ Specifically, the German government intends to strengthen EU support for the implementation of the African Continental Free Trade Area (AfCFTA) and scale EU initiatives on renewable energy in Africa.

Germany is well-positioned to build on its close economic and diplomatic ties with Turkey to reconcile EU-Turkish relations and competing African interests. The most pressing issue is to resolve tensions surrounding competing claims to maritime exploration concessions in the Eastern Mediterranean, which have burdened EU-Turkish relations immensely. A strategy to reconcile the conflicting parties through diplomatic means should be developed. The European Council has endorsed the idea of a multilateral conference for the Eastern Mediterranean. The recent rapprochement between Turkey and Egypt following ten years of political hostilities provides an opening to bring all parties to the table. Improving EU-Turkish relations could open the door to cooperation and coordination on matters of regional security in the Sahel and North Africa.

Engaging in a closer relationship with Turkey in Africa could prove instrumental in promoting Europe's geopolitical agenda. Among the rising powers in Africa, Turkey has the closest economic, political, and cultural ties with Europe. Turkey—a member of NATO—could be a critical partner in European efforts to counter Chinese and Russian influence in Africa. Berlin has recognised a radical shift to the international system following Russia's invasion of Ukraine in 2022 and—as highlighted in the *Zeitenwende* address—is intent on taking a more active role in geopolitical security matters. Engaging in deeper partnerships with African states, which are set to play an important role in the emerging multipolar order, has moved up the agenda. Cooperation with Turkey in selective policy fields and regional scenarios where interests align could facilitate Germany's strategic agenda.

Germany and the EU should actively court Turkey to engage in economic partnerships with a shared interest in promoting infrastructure development, especially related to the implementation of the AfCFTA and renewable energy in Africa. Both Germany and the EU plan to increase their support for initiatives targeting large-scale renewable energy structures through multilateral initiatives, such as Global Gateway and Africa Renewable Energy Initiative (AREI). Turkey's interest in the development of North Africa could be used to engage in multilateral partnerships between EU member states

⁹¹ Oliver Noyan, "Germany seeks key role in new EU-Africa policy", *Euractiv* (online), 18 February 2022, <https://www.euractiv.com/section/africa/news/germany-seeks-key-role-in-new-eu-africa-policy/>

and Turkey to develop the region's green hydrogen market, as well as solar and wind farms.

The Turkish construction sector has proven capable of challenging China's dominance in Africa's infrastructure sector. As Germany is eyeing a stronger role in Africa's lucrative infrastructure sector, it could seek to build on close economic ties to foster German-Turkish construction on the African continent.

Abbreviations

AfCFTA	<i>African Continental Free Trade Area</i>
APC	<i>Armed Personal Carriers</i>
APSA	<i>African Peace and Security Architecture</i>
AREI	<i>Africa Renewable Energy Initiative</i>
AU	<i>African Union</i>
BMZ	<i>Ministry for Cooperation and Development</i>
BRI	<i>Belt and Road Initiative</i>
CwA	<i>Compact with Africa</i>
DAC	<i>Donor Assistance Committee</i>
EU	<i>European Union</i>
EUMPM	<i>European Union Military Partnership Mission in Niger</i>
FDI	<i>Foreign Direct Investment</i>
FTA	<i>Free Trade Agreement</i>
GNA	<i>Government of National Accord</i>
GNU	<i>Government of National Unity</i>
LNG	<i>Liquefied Natural Gas</i>
MINUSMA	<i>United Nations Multidimensional Integrated Stabilization Mission in Mali</i>
MINUSRO	<i>United Nations Mission for the Referendum in Western Sahara</i>
MW	<i>Megawatts</i>
NATO	<i>North Atlantic Treaty Organization</i>
NAVFOR	<i>European Union Naval Force</i>
ODA	<i>Official Development Assistance</i>
PKK	<i>Kurdistan Worker's Party</i>
SAM	<i>Surface-to-air Missiles</i>
SDG	<i>Sustainable Development Goal</i>
SRAM	<i>Short-range Air-to-air-Missiles</i>
TIKA	<i>Turkish Cooperation and Coordination Agency</i>
Twh	<i>Terawatt-Hour</i>
UNMISS	<i>United Nations Peacekeeping Mission in South Sudan</i>

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The Centre for Applied Turkey Studies (CATS) at Stiftung Wissenschaft und Politik (SWP) in Berlin is funded by Stiftung Mercator and the Federal Foreign Office. CATS is the curator of CATS Network, an international network of think tanks and research institutions working on Turkey.

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SWP Stiftung Wissenschaft und Politik
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Ludwigkirchplatz 3–4, 10719 Berlin
www.swp-berlin.org
www.cats-network.eu
ISSN 2941-4466