

CATS Network Roundup

A roundup of news and analysis on Turkey



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Dear Readers,

Welcome to the CATS Network Roundup of news, developments, and assessments concerning relevant issues about Turkish domestic politics and foreign policy.

In this issue, we analyse **President Erdoğan's meeting with President Trump in Washington**, where both leaders praised the outcome. Yet despite the warm rhetoric, CAATSA sanctions and Turkey's exclusion from the F-35 programme continue to cast a shadow over the partnership. We assess how this rapprochement could advance Ankara's strategic interests – and to what extent it might lead **Brussels to revise its incentives in order to remain relevant in Ankara's foreign policy**.

If you have any questions or suggestions, please e-mail us at cats@swp-berlin.org.

On the Spot



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Following his visit to the White House, Turkish President Recep Tayyip Erdoğan expressed satisfaction, describing the meeting as “so successful that it cannot be tainted by criticism” and emphasising that significant progress had been made on several issues. US President Donald Trump also characterised the meeting as “very productive”, calling Erdoğan his “friend” and a “tough guy”. The US Ambassador to Ankara, Tom Barrack, described it as “historic” and “more than excellent”. These statements suggest a generally cooperative atmosphere.

Even before the visit, Ankara had signalled its willingness for dialogue by easing selected import tariffs on US products and announcing the purchase of Boeing aircraft. During the visit, **Turkey and the United States signed a 20-year liquefied natural gas (LNG) supply agreement**, as well as a cooperation protocol on civilian nuclear energy.

Growing economic interdependence is particularly important for Turkey; trade volume reached around \$32.5 billion in 2024, with both sides aiming to raise it to \$100 billion. **More than 2,000 US companies operate in Turkey, with investments continuing to grow**; Turkish Airlines offers direct flights from Istanbul to 14 US cities, and tourism is expanding, with more than 1.4 million US citizens visiting Turkey in 2024.

Despite close economic ties and shared geopolitical interests, political relations remain tense. The main point of contention is the Countering America's Adversaries Through Sanctions Act (CAATSA), which resulted in Turkey's exclusion from the F-35 programme. Erdoğan's visit ended without tangible progress on this issue. However, the trip was symbolically successful, as his appearance in Washington signalled to the international community that he had established a working relationship with the unpredictable global superpower leader, Trump. This also sent a reassuring message to international financial markets by suggesting greater political stability and the prospect of renewed economic opportunities for Ankara. Given Washington's influence over global capital flows, projecting such stability in US-Turkey relations could prove strategically advantageous.

Trump publicly urged Turkey to stop purchasing Russian natural gas, highlighting the limits of Ankara's geopolitical balancing act between the West, Russia, and China. In recent years, **Turkish foreign policy has embraced “strategic autonomy”, viewing a multipolar world as a chance to increase flexibility**. From this perspective, Russia and China are viewed as strong global actors, serving as insurance against overdependence on the West. However, Erdoğan's visit to Washington and his involvement in the Gaza agreement suggest a shift towards the United States.

Washington and Ankara are currently strengthening their energy cooperation. During Erdoğan's visit, a memorandum of understanding was signed for strategic collaboration in civilian nuclear technology. Furthermore, the Turkish state-owned energy company, BOTAŞ, has agreed to import significant quantities of US LNG. Although a complete break with Russia in the energy sector remains unlikely, these steps will reduce Moscow's influence and send a political message to Washington.

Turkish foreign policy has been marked by managing multiple external relationships simultaneously to ensure internal political stability. Partnerships with Russia, such as the construction of Turkey's first nuclear power plant by Rosatom and the purchase of the S-400 missile system, serve this diversification strategy.

Images from the White House circulated in pro-government media outlets were designed to boost Erdoğan's domestic standing. His visit exemplifies a transactional and interest-driven approach (omni-balancing) in which **short-term gains for regime security outweigh long-term commitments**.

One of Erdoğan's successes in consolidating his regime is the apparent US indifference to Turkey's shift towards a de facto one-party state – an outcome seemingly tolerated despite conflicting with American interests. **This tacit acceptance allows Erdoğan to continue his authoritarian consolidation with implicit US backing.** Consequently, Turkish policy towards the United States will likely remain shaped by transactionalism and omni-balancing – the simultaneous management of diverse external relationships.

Taken together, a breakthrough in Turkish–American relations remains elusive. Although agreements have been reached on energy, trade, and Turkey's mediating role in the Gaza deal, negative perceptions of Ankara persist among US policy-makers, diplomats, and analysts. A fresh start in bilateral relations is not in sight. Instead, **the continuation of pragmatic, interest-driven patterns appear likely**. Turkish foreign policy thus primarily serves to safeguard domestic power through international legitimisation.

(Yaşar Aydın)

Three Questions for...



[Alper Coşkun](#) is a senior fellow within the Europe Program at the Carnegie Endowment for International Peace in Washington, DC. His research focuses on Turkish foreign policy, especially in relation to the United States and Europe.

What strategic benefits does the revitalised US-Turkey partnership offer Ankara in terms of economic growth and energy diversification?

Renewed US-Turkey engagement under the Trump administration has created space to rekindle a partnership constrained by mistrust. For Ankara, these geopolitical gains are coupled with potential economic dividends such as restoring investor confidence, reviving defence industry cooperation, expanding bilateral trade, and deepening energy ties with the US. The latter is particularly timely, as Turkey's long-term gas arrangements with Russia and Iran – two leading suppliers – are set to mature. Although Turkey cannot realistically sever these energy ties, an increased supply of American LNG and prospects for civil nuclear cooperation strengthen Ankara's bargaining leverage and support its diversification efforts at a politically sensitive moment.

How does the US-Turkey rapprochement serve Ankara, and could it ease tensions over the Countering America's Adversaries Through Sanctions Act (CAATSA)?

The deteriorating and conflict-ridden international landscape has made strained relations with the US increasingly costly for Turkey. Among other disadvantages, this weakens Turkey's deterrence against Russia and benefits its arch-rival, Greece. The Trump administration's readiness for collaboration gives Ankara an opportunity to remedy this problem and build previously elusive convergences with Washington.

CAATSA sanctions symbolise a deep bilateral rift and undermine defence industrial cooperation – long the backbone of the partnership. Turkey is eager to overcome this obstacle as well as rejoin the F-35 programme. Trump has hinted at this possibility – which may begin with a presidential waiver and eventually require Congressional approval – while noting he has expectations in return, signalling his readiness to strike a deal. The current rapprochement makes this possible.

To what extent could this rapprochement lead Brussels to revise its incentives to remain relevant in Ankara's foreign policy?

The rapprochement has eased bilateral tensions and offered Ankara a source of political support, contrasting with Turkey's strained relations with the EU and temporarily minimising Brussels' relevance in Ankara's strategic calculus.

Yet, this does not obviate the deep structural interdependence between Turkey and Europe or the strategic imperative to sustain strong cooperation. For Europe, the challenge is to more effectively cultivate this relationship through the right incentives. Although accession talks are stalled and persistent political obstacles remain, progress in areas of proven success – such as modernising the Customs Union and developing practical measures to deepen defence and security cooperation – could restore momentum in this underperforming, yet critical relationship. This would be consistent with and complement ongoing bilateral outreach by key European states and reinforce Brussels' relevance in Ankara's broader vision.

Interview by [Lisa Schwitalla](#)

Recommendations

The latest [CATS Network Perspective](#) examines the potential implications of the US–EU conflict for Turkey's trade and supply chain policies. Various authors of the CATS Network argue that, although Turkey may benefit from transatlantic trade tensions, its dependence on imports in addition to the complex regulatory framework leave the country exposed to significant risks.

In his Carnegie Emissary commentary titled [“Recep Tayyip Erdoğan's Bet on Donald Trump Is Paying Off”](#), Alper Coşkun illustrates how Erdoğan's alignment with Trump is reshaping Turkey's relations with both Washington and Europe, albeit at the expense of democratic norms and amid growing concerns about the country's overall trajectory.

Adam Michalski and Karol Wasilewski, in their Centre for Eastern Studies (OSW) analysis [“Turkey and the US: a costly normalisation”](#), argue that rapprochement between Ankara and Washington remains unequal and incomplete. They caution that genuine alignment requires conditional engagement and sustained leverage over sanctions compliance, defence transparency, and energy ties with Russia.

The Atlantic Council blog post [“Experts react: What's next for US-Turkey ties after Erdoğan's White House visit?”](#) highlights a noticeable shift in tone in Ankara–Washington relations, while noting that critical issues – including the F-35 programme, sanctions, and energy ties with Russia – remain unresolved. For further insights into how US–Turkey cooperation in energy security and commerce can strengthen regional stability amid shifting geopolitical dynamics, see Pınar Dost's latest [Atlantic Council](#) analysis.

In her [SWP Kurz-gesagi](#) (in German), Sinem Adar explores how structural constraints and divergent strategic priorities continue to limit the US–Turkey partnership, arguing that although pragmatic cooperation remains possible, fundamental political and regional differences persist.

Kind regards,

The CATS Team