



Long Policy Report on Turkey's Ambitions and Leverage

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Executive summary

Between Minarets and Megaprojects: Turkey's Influence Across EU Candidate Countries

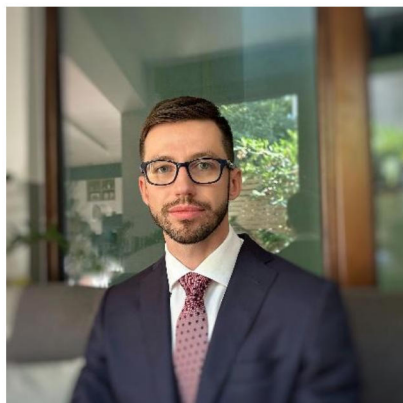
This report examines Turkey's influence in the Western Balkans (Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia) and the Eastern Trio (Georgia, Moldova, and Ukraine) over the past decade, focusing on political, economic, and societal dimensions. Using the InvigoratEU External Influence Index—an empirical tool specifically designed for this study—it systematically measures and compares Turkish leverage across nine EU candidate and partner countries. The Index captures shifts from 2013 to 2023, offering a cross-country and longitudinal analysis of how Ankara has engaged with the region and how these countries have responded. The findings show that Turkey's influence is neither uniformly benign nor overtly antagonistic, but shaped by local receptivity, institutional interest, and historical or cultural proximity. Unlike coercive actors, Turkey typically avoids direct confrontation with the EU, opting instead for relational diplomacy, targeted investments, and long-term societal engagement. Political influence has grown modestly, driven by high-level visits, security cooperation, and elite alignment—especially in Kosovo, Ukraine, and North Macedonia. Economic influence has expanded more steadily, fuelled by concessional loans, preferential trade agreements, and infrastructure projects. However, macroeconomic instability in Turkey casts doubt on the long-term sustainability of this outreach. Societal influence emerges as the most persistent and embedded dimension. Through cultural diplomacy, religious networks, educational initiatives, and media presence—including popular Turkish TV series—Turkey has cultivated durable societal linkages, particularly in Muslim-majority areas of the Western Balkans. While this influence is less pronounced in the Eastern Trio, it plays a growing role in public perceptions. These trends suggest that Turkey's influence is best understood as adaptive and opportunistic rather than expansionist or ideological. It advances where EU presence is weak, particularly at the local level, and where Turkey can act quickly and visibly.

Importantly, Turkish influence should not be seen as inherently malign. As a NATO member, Ankara has often supported Euro-Atlantic security priorities—from contributing troops to regional missions to backing collective defence measures in the Black Sea—and in some cases has complemented rather than competed with EU objectives. Yet the line between constructive engagement and problematic interference can be thin, especially when Turkey externalises its domestic political agenda through pressure on partner governments.

For the EU, this calls for a strategic response that reinforces its credibility, reclaims societal space, and avoids unnecessary antagonism with Ankara – while remaining alert to cases where Turkish influence can undermine democratic resilience in EU candidate countries. The Union's response should therefore be less about constraining Turkey and more about investing in its own appeal and effectiveness. This means ensuring timely delivery of promised financial and infrastructure projects, making EU engagement more visible on the ground, and working directly with municipalities, universities, and civil society to generate bottom-up legitimacy. It also requires pragmatic coordination with Ankara in areas of shared concern, such as migration management or infrastructure security, while safeguarding conditionality whenever Turkish pressure risks undermining rule-of-law or human rights commitments in partner states. Preventing asymmetric dependencies will be equally important: the EU must support investment screening and provide credible alternatives through instruments like the EIB and EBRD. Finally, reclaiming the soft-power edge will

demand more robust cultural and educational programmes, investment in regional media, and clear communication of the EU's core values – secularism, inclusivity, and democratic governance – as the non-negotiable foundations of the European project. Taken together, these measures would allow the EU to channel Turkey's presence into a more complementary direction, while ensuring that European norms and institutions remain the decisive reference point for countries on the path to accession.

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About InvigoratEU

InvigoratEU is a Horizon Europe-funded project, coordinated by the EU-Chair at the University of Duisburg-Essen (UDE) together with the Institut für Europäische Politik (IEP) in Berlin. The project, with a duration of 3 years from January 2024 until December 2026, examines how the EU can structure its future relations with its Eastern neighbours and the countries of the Western Balkans. The consortium has received around three million euros for this endeavour.

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1 Introduction

The trajectory of EU-Turkey relations offers a revealing case study in how a long-standing candidate country can gradually evolve into an increasingly autonomous and assertive regional actor. What began with the signing of the Association Agreement in 1963 and deepened through the establishment of a Customs Union in 1996, the granting of candidate status in 1999, and the launch of accession negotiations in 2005, was once widely perceived as a pathway toward eventual EU membership.¹ Over time, however, this trajectory was disrupted by a convergence of challenges – including democratic backsliding within Turkey, increasing divergence from the EU's Common Foreign and Security Policy (CFSP), and unresolved disputes in the Eastern Mediterranean. These include Turkey's continued support for the self-declared Turkish Republic of Northern Cyprus, bilateral tensions with Greece, and additional frictions over regional security – most notably Turkey's military involvement in Syria and Libya, which has frequently placed it at odds with EU member states. Since 2018, accession talks have been effectively frozen,² and the EU has gradually adjusted its posture: **Turkey is no longer approached primarily as a prospective member state, but rather as an external strategic actor with distinct – and at times competing – geopolitical interests.**

Still, Turkey cannot be equated with other revisionist or illiberal actors such as Russia or China. Its relationship with the EU is anchored in a broad institutional framework that includes formal accession negotiations (though currently stalled), pre-accession financial assistance through the IPA mechanism, a longstanding Customs Union covering industrial goods and processed agricultural products, and ongoing political and technical dialogue across various policy areas. Moreover, on the societal level, Turkey is closely intertwined with the EU through a large and active diaspora – primarily in Germany – and through the enduring influence of European norms and values in Turkey, particularly among the urban middle classes, civil society actors, and political constituencies that continue to support EU membership. Furthermore, as a NATO member situated at a critical geopolitical junction, Turkey retains a constructive role in European security affairs. This layered and ambivalent positioning suggests that Turkish influence in neighbouring regions should not be labelled *a priori* as malign but rather assessed contextually – through the lens of both its instruments and effects.

Against this backdrop, Turkey's expanding presence in the Western Balkans and the Eastern Trio region deserves nuanced analysis. Building on historical linkages and geographical proximity, Ankara has pursued a multi-dimensional strategy combining political support for select leaders, security cooperation, economic investment, as well as cultural and religious outreach. While such involvement is not intrinsically problematic, it may – under certain political and societal conditions – contribute to the normalisation and mainstreaming of illiberal narratives, reinforce personalised leadership styles, or foster a more favourable perception of Turkey's increasingly authoritarian model of governance. Moreover, Turkey may be cited as an example offering an alternative model of engagement with the EU – one that allows for significant economic and strategic benefits without alignment with democratic standards or a credible commitment to full membership. Yet Turkish influence is not always destabilising. In certain

¹ Delegation of the European Union to Türkiye: The European Union and Türkiye, 28 September 2021, available at: https://www.eeas.europa.eu/turkey/european-union-and-turkey_en?s=230 (last accessed: 23.06.2025)

² Council of the EU: Council Conclusions on Enlargement and Stabilisation and Accession Process, 10555/18, 26 June 2018. (last accessed: 23.06.2025)

contexts, Ankara has maintained pragmatic relations across political and ethnic divides, supported institution-building efforts, or contributed to regional dialogue – suggesting that, under the right conditions, its engagement can complement EU objectives rather than undermine them. As such, understanding the nature and consequences of Turkish engagement is crucial for crafting informed EU policy.

In light of Turkey's ambivalent presence in the Western Balkans and the Eastern Trio, its role must also be viewed through the broader lens of EU resilience. Resilience – understood as the ability of states and societies to reform, thus withstanding and recovering from internal and external crises³ – extends beyond the EU's borders and includes the stability and integrity of its candidate and partner countries. While not all external actors operate with hostile or revisionist intent, their involvement can shape institutional trajectories and political choices in ways that do not always align with EU norms or strategic interests. To navigate this landscape, the EU applies a dual logic: a “modernisation logic”, which seeks to foster democratic governance, inclusive development, and social cohesion within neighbouring states; and a “geopolitical logic”, aimed at protecting these countries from external influence that may compromise such progress.⁴ In this context, Turkey presents a distinctive case – its influence is neither overtly antagonistic nor unequivocally benign. As its role evolves, particular attention must be paid to how certain modes of engagement – such as elite alignment, foreign investments, or cultural diplomacy – may affect democratic institutions and undermine the overall resilience of candidate countries to external pressures. Resilience-building must, however, encompass not only candidate countries' capacity to absorb and manage such influence, but also the EU's own ability to anticipate and respond to indirect pressures on its normative and strategic environment.

Thus, this policy report offers an in-depth analysis of Turkey's geopolitical ambitions and instruments of influence across two regions of strategic relevance to the European Union: The Western Balkans (Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia, and Serbia) and the Eastern Trio (Georgia, Moldova, and Ukraine). Covering the period from 2013 to 2023, the analysis draws on the **InvigoratEU External Influence Index** to map, compare, and quantify the scope and intensity of Turkish influence across political, economic, and societal domains. In doing so, the report investigates Turkey's strategic objectives, available leverage, and modes of engagement, and provides actionable recommendations to EU policymakers on how to effectively navigate and respond to what is increasingly perceived as an expanding Turkish presence in its immediate neighbourhood.

2 Methodological Framework

This study applies a structured and multi-dimensional methodology to assess Turkey's geopolitical influence across the EU's Neighbourhood, encompassing both the Eastern Trio and the

³ European External Action Service: European Union Global Strategy, 2016, p. 23.

⁴ See Hannah Brandt/Funda Tekin/Paul Bargañés/Ramūnas Vilpišauskas: Growing Resilient Together: Reshaping EU-Enlargement and Neighbourhood Policy in a Geopolitical Era, June 2024.

* This designation is without prejudice to positions on status and is in line with UN Security Council Resolution 1244 and the International Court of Justice Opinion on the Kosovo Declaration of Independence.

Western Balkans. The analysis integrates qualitative and quantitative research methods, tailored to reflect the complexity of external influence in these regions. Central to this methodological framework is the **InvigoratEU External Influence Index** – an empirically grounded instrument developed within the project *InvigoratEU – How to Reform the EU’s Enlargement and Neighbourhood Policy for a Resilient Europe*, funded by the European Commission’s Horizon Europe programme.⁵ The Index systematically quantifies and compares the political, economic, and societal leverage of three major external actors: Russia,⁶ China,⁷ and Turkey. It has been jointly developed by the European Policy Centre (CEP) and Istituto Affari Internazionali (IAI), in collaboration with partner institutions: Institut für Europäische Politik (IEP), PMC Research Center (PMC RC), Ss. Cyril and Methodius University (UKIM), and the Institute for Strategic Initiatives (IPIS). Building on CEP’s earlier work on a pilot index measuring foreign influence in Serbia,⁸ the methodology has been significantly expanded to cover nine countries and three external actors, thereby allowing for both cross-country comparison and longitudinal analysis. This collaborative approach underpins a robust and scalable framework for evaluating external influence, in full alignment with the objectives of this Horizon-funded research initiative.

Conceptual Foundations of the InvigoratEU External Influence Index

The development of the InvigoratEU External Influence Index is grounded in established concepts that explore how external actors shape the behaviour of third countries. A key conceptual foundation are the notions of “linkages” and “leverage”, introduced by Levitsky and Way,⁹ which differentiates between two main mechanisms of external influence. Linkages refer to structural interdependencies – economic, intergovernmental, technocratic, societal, informational, and civil society-based – that bind a country to external actors and shape its domestic political and economic choices. Leverage, by contrast, denotes the capacity of an external power to apply direct pressure on domestic elites to induce policy shifts or strategic realignment. These two dimensions interact dynamically, with deeper linkages often reinforcing an external actor’s leverage over internal decision-making processes.

In parallel, the Index integrates the concept of “soft power”, as theorised by Joseph Nye,¹⁰ highlighting the role of non-coercive influence exercised through culture, values, and narratives. As also demonstrated in this report, this dimension is particularly relevant in the case of Turkey, which has increasingly invested in projecting a favourable image abroad and cultivating influence through a diverse set of instruments – such as cultural and religious institutions, media outreach, development aid, and educational initiatives.

⁵ See *InvigoratEU: Invigorating Enlargement and Neighbourhood Policy for a Resilient Europe* project’s website at <https://invigorat.eu> (last accessed: 24.06.2025).

⁶ See Marko Todorović: Long Policy Report on Russia’s Ambitions and Leverage, May 2025.

⁷ See Matteo Bonomi: Long Policy Report on China’s Ambitions and Leverage, August 2025.

⁸ Strahinja Subotić/Miloš Janjić: Serbia at the Crossroads between the West and the East, European Policy Centre (CEP), 2020.

⁹ Steven Levitsky/Lucan A. Way: Linkage versus leverage. Rethinking the international dimension of regime change, in: *Comparative Politics*, 38 (4), 2006, pp. 379–400.

¹⁰ Joseph Nye: Soft Power. The Means to Success in World Politics, Public Affairs 2004.

In translating these conceptual foundations into a measurable framework, the Index applies a practical classification inspired by Bieber and Tzifakis,¹¹ who distinguish external influence across three overarching spheres: political-security, economic, and societal. This tripartite structure serves to streamline the analysis and facilitate comparison across cases. In the context of Turkey, it captures the wide spectrum of engagement strategies – ranging from diplomatic partnerships and infrastructure investments to educational initiatives and cultural promotion – through which Ankara seeks to advance its interests and shape the strategic outlook of countries in its neighbourhood.

Structure of the InvigoratEU External Influence Index

The External Influence Index operationalises key conceptual insights by measuring Turkey's influence across three core dimensions:

1. **Political-Security Influence** – This dimension captures Turkey's involvement in bilateral and multilateral frameworks, its political engagement within domestic arenas, defence cooperation, and alignment on foreign policy matters. It encompasses Ankara's diplomatic initiatives, ties with political actors and parties, potential attempts to shape legislative agendas, military partnerships, and congruence or divergence with the foreign policy priorities of the analysed countries.
2. **Economic Influence** – This dimension assesses trade and investment linkages as well as structural economic dependencies. It reflects Turkey's role in trade volumes, foreign direct investment, presence in strategic sectors (such as construction, energy, or banking), infrastructure development, and credit arrangements – providing a basis for understanding how economic ties translate into political leverage.
3. **Societal Influence** – This dimension examines cultural, educational, informational, and people-to-people connectivity. Indicators include visa and mobility regimes, diaspora links, tourism flows, student exchange programmes, Turkish media and religious networks, and public attitudes toward Turkey – capturing how soft power tools contribute to influence within the societal sphere.

Each dimension consists of a set of indicators evaluated through a structured scoring system ranging from 0 to 3, capturing the intensity and depth of Turkey's engagement in each area. To enhance visual clarity and facilitate intuitive cross-country and over-time comparisons, the aggregated scores displayed in the graphs have been rescaled to a 0–10 scale, while preserving the proportional relationships established in the original 0–3 scoring framework. The full structure of the Index—including all indicators and their respective weights—is detailed in **Annex I**.

Research Design and Data Collection

The study employs a mixed-methods approach, combining quantitative data collection with qualitative analysis. The research process involved the following components:

¹¹ Florian Bieber/Nikolaos Tzifakis (eds), *The Western Balkans in the World. Linkages and Relations with Non-Western Countries*, Routledge 2020.

Desk Research – A comprehensive review of academic literature, policy analyses, official documents, and media sources was conducted to map Turkey’s influence across the targeted countries.

Index Scoring – The InvigoratEU External Influence Index was compiled through a structured evaluation process that integrated publicly available data, expert assessments, and systematic cross-referencing with regional studies to ensure reliability and analytical coherence.

Expert Interviews – Semi-structured interviews were conducted with policymakers, analysts, and scholars to contextualise quantitative findings and provide insights into recent developments and national-level dynamics.

It is important to note that this study does not rely on fieldwork or primary source analysis conducted within Turkey. This reflects a deliberate methodological choice: the aim is not to examine Turkish foreign policymaking from within, but rather to analyse how Turkey’s geopolitical ambitions manifest externally. By focusing on the projection and perception of Turkish influence in EU candidate and neighbouring countries, the study captures the mechanisms, intensity, and effects of this influence where it is experienced—on the receiving end.

The temporal scope of this study covers a ten-year period, with data points for the years 2013, 2018, and 2023. The selection of 2013 as the primary benchmarking year is methodologically significant for several reasons. First, it predates a range of internal and external shifts that later redefined Turkey’s foreign policy orientation—most notably the Gezi Park protests and the gradual move towards executive centralisation. Second, it was a pivotal year in the context of EU enlargement and neighbourhood policy. That year, EU member states opened accession negotiations with Serbia, following Montenegro’s earlier start in 2012, while Association Agreements with Ukraine, Moldova, and Georgia were being finalised. At the same time, Croatia’s accession to the EU marked the last wave of enlargement, further shaping the political context in which Turkey and other actors engaged the region. The year 2018 was selected as a midpoint between 2013 and 2023, offering a snapshot of regional dynamics after Turkey’s domestic political system had undergone significant transformation, including the transition to a presidential system and the consolidation of an increasingly centralised executive. It also marked the formal suspension of EU accession negotiations with Turkey, reflecting a broader shift in EU–Turkey relations. The reference year 2023 was chosen as the most recent point with sufficient data availability at the time of research implementation in 2024 – particularly in the economic domain.¹² By this time, Turkey was increasingly viewed not as a candidate country in the traditional sense, but as an autonomous regional actor whose engagement in the Western Balkans and Eastern Trio region required strategic navigation by the EU.

While the Index calculations focus on 2013, 2018, and 2023, the analysis takes into account key developments from adjacent years wherever relevant. This historical perspective enables the study to trace the evolution of Turkey’s external influence across time, shedding light on both moments of continuity and structural change. By adopting this longitudinal lens, the research provides a more nuanced understanding of how Turkey’s presence in the EU’s immediate

¹² This does not mean that the report ignores ongoing developments; where critically relevant, the analysis incorporates key events from 2024 and early 2025 to provide additional context. However, the InvigoratEU External Influence Index itself is calculated exclusively on the basis of data available for 2023.

neighbourhood has unfolded – offering valuable insights for designing strategic policy responses at the EU level.

3 Turkey's 21st Century Ambitions: From Western Flank to Sovereign Pole

Turkey's geopolitical trajectory since the early 2000s marks a fundamental redefinition of its place in the world. Departing from its Cold War identity as a defensive, NATO-anchored flank state fixated on EU accession and internal stability under the guardianship of its military-bureaucratic establishment,¹³ **Ankara now pursues an ambitious vision: to establish itself as an independent pole in an emerging multipolar global order.**¹⁴ This transformative ambition, crystallised under Recep Tayyip Erdoğan and intellectually framed by Ahmet Davutoğlu's doctrine of "Strategic Depth," leverages Turkey's unique geography, Ottoman heritage, and cultural-religious affinities.¹⁵ It explicitly rejects subordination to the West or alignment with rival blocs, aspiring instead to greater sovereignty – the autonomy to define its interests, shape outcomes across its vital periphery, and command recognition as a pivotal global actor. This aspiration is rooted in a sense of civilisational grandeur,¹⁶ whereby Turkey positions itself as a leading heir to the Islamic civilisation and a natural centre of gravity within it.

Turkey's ambitions must also be situated within the dual institutional frameworks that continue to tie it to Europe. On the EU side, Ankara remains a formal candidate country and part of the Customs Union, benefiting from trade liberalisation and pre-accession funds, yet without aligning with the Union's political conditionality. This combination of deep economic integration and stalled political convergence is unique: no other actor in the EU's neighbourhood is simultaneously so embedded and so divergent. On the NATO side, Turkey plays an even more paradoxical role. As the Alliance's second-largest military power and a pivotal Black Sea and Middle East actor, it is indispensable for collective defence. At the same time, Ankara has repeatedly strained cohesion – from acquiring Russian S-400 air defence systems and being excluded from the F-35 programme,¹⁷ to leveraging its veto power over NATO enlargement for political concessions.¹⁸ These peculiarities make Turkey a partner unlike any other: institutionally anchored inside Europe's security and economic order, yet assertively pursuing autonomy in ways that can unsettle both the EU and NATO.

¹³ Mustafa Aydin: Determinants of Turkish Foreign Policy: Changing Patterns and Conjectures during the Cold War, in: Middle Eastern Studies, 36(1), 103-139.

¹⁴ For more on Turkish quest for a vision for a multipolar world see Senem Aydın-Düzgit/Ayşe Zarakol: Turkey Seeks a Vision for a Multipolar World, in: Leslie Vinjamuri (ed.), Competing Visions of International Order: Responses to US Power in a Fracturing World, 2025, London: Royal Institute of International Affairs.

¹⁵ Ahmet Davutoglu: Strategik Derinlik, Türkiye'nin Uluslararası Konumu, İstanbul: Kure Yayınları, 2001.

¹⁶ Sebastian Haug/Supriya Roychoudhury: Civilizational Exceptionalism in International Affairs: Making Sense of Indian and Turkish Claims, International Affairs, 99 (2), 531-549.

¹⁷ Michael Makovsky/Blaise Misztal/Eric Edelman/Alan Makovsky/Svante Cornell/Johan Brody: Flight Risk: Turkey and the F-35, The Jewish Institute for National Security of America, April 2025.

¹⁸ Toni Alaranta: NATO's Nordic Enlargement and Turkey's Reservations: Trilateral Memorandum of Understanding in the Context of Turkey's Wider Strategic Interests, September 2022.

Similarly, Turkey's quest for autonomy has also been expressed through its distinct identity-driven foreign policy, rooted in the rise of the AKP (*Justice and Development Party*) in the early 2000s. Yet, this identity-based approach proved increasingly difficult to sustain amid the turbulence of the 2010s. The Arab uprisings disrupted Turkey's equidistant "zero problems with neighbours" diplomacy and exposed the risks of aligning with Islamist movements such as the Muslim Brotherhood, particularly as Ankara sought to position itself as a moral and civilisational leader.¹⁹ This stance alienated several regional actors, intensified polarisation between pro- and anti-Islamist regimes, and provoked unease among Western partners. Moreover, in the Balkans and parts of the post-Soviet space, Turkey's increasingly religiously framed engagement also generated discomfort among Christian-majority societies, where such outreach efforts were often perceived as revisionist or intrusive rather than benign.²⁰ As these dynamics unfolded, Turkish foreign policy gradually shifted toward a more pragmatic, interest-based model under Erdoğan's centralised leadership – less concerned with projecting identity and more focused on flexibility, strategic autonomy, and bilateral leverage.²¹ While value-driven narratives receded, the underlying ambition remained intact: **Turkey's ultimate goal is not regional dominance *per se*, but irreplaceability – ensuring that no significant decision affecting its near abroad (especially the Western Balkans and Eastern Trio) is made without its voice or against its core interests.**

While Turkey's foreign policy has moved away from the idealism of value-based diplomacy, it continues to draw selectively on identity-linked instruments alongside more transactional forms of engagement. Based on our research, four distinct yet interrelated sub-ambitions can be identified, each reflecting how Ankara operationalises its aspiration to act as an independent pole in global affairs. Though differing in method and emphasis, these dimensions jointly underpin Turkey's pursuit of strategic relevance across its neighbourhood:

- **Civilisational anchoring.** Positioning Turkey as a cultural and religious reference point by reactivating shared civilisational narratives. Through mosque-building, religious diplomacy, and educational outreach, Ankara seeks to foster identity-based linkages that differentiate its presence from that of Western or Russian actors.
- **Elite alignment.** Securing influence through direct engagement with political and security elites, often via personal rapport and transactional partnerships. This includes high-level visits, public endorsements, defence cooperation, and intelligence coordination aimed at cultivating loyalty and privileged access.
- **Economic leverage.** Creating long-term influence by embedding Turkish capital in key economic sectors through infrastructure investments, strategic enterprises, and preferential trade arrangements. These initiatives generate vested interests among local actors and enhance Turkey's profile as a dependable economic partner.

¹⁹ Henri J. Barkey: Turkey and the Arab Spring, 26 April 2011, available at: <https://carnegieendowment.org/posts/2011/04/turkey-and-the-arab-spring?lang=en> (last accessed: 02.07.2025)

²⁰ Vuk Vuksanović: How the Balkans Were Won: A Turkish Foreign Policy Success Story, 17 October 2017, available at: <https://nationalinterest.org/feature/how-the-balkans-were-won-turkish-foreign-policy-success-22771> (last accessed: 02.07.2025)

²¹ Vuk Vuksanović/Srdan Hercigonja: Between Emotions and Realism: Two Faces of Turkish Foreign Policy in the Balkans, Belgrade Centre for Security Policy, June 2023.

- **Strategic balancing.** Projecting Turkey as an autonomous regional actor by actively balancing between Western frameworks and alternative power centres, such as Russia, China, and Gulf states. The aim is to be perceived as an indispensable intermediary – one whose presence and cooperation are essential for any durable solution in its immediate neighbourhood.

Turkey's deployment of influence-building instruments across its near abroad is far from uniform. While the overarching ambition of strategic irreplaceability remains constant, the means and messages through which it is pursued vary considerably between the Western Balkans and the Eastern Trio. These two subregions activate different layers of Ankara's foreign policy repertoire – civilisational in the former, geopolitical in the latter – reflecting distinct logics of engagement shaped by history, identity, and threat perception.

In the Western Balkans, Turkey's engagement represents a carefully curated return to a region where it enjoys deep-rooted historical, cultural, and religious ties dating back to the Ottoman era.²² This space functions as a platform for civilisational affirmation, particularly through references to shared Islamic heritage and long-standing relations with local Muslim communities. At the same time, Ankara seeks to project itself as a balanced and impartial partner, engaging constructively with Christian-majority societies and positioning itself as a potential mediator in regional and internal political conflicts. Through mosque construction, cultural diplomacy, and high-level political alignment, Turkey fosters influence with relatively low resistance. Success in this domain provides symbolic validation of its civilisational narrative while also reinforcing its image as a pragmatic and stabilising actor – uniquely among Euro-Atlantic powers in possessing such deep societal embeddedness in the region.

In contrast, Turkey's approach to the Eastern Trio is driven by geopolitical calculation rather than cultural proximity. Engagement with Ukraine, Georgia, and Moldova centres on three priorities: securing the Black Sea as a strategic space, containing Russian influence, and asserting Turkey's credibility as a NATO member capable of autonomous security provision between East and West.²³ Here, Ankara relies on defence partnerships, arms transfers, critical infrastructure investments, and diplomatic support. Cultural engagement plays a less prominent role. The Eastern Trio thus serves as a testing ground for Turkey's ability to operate as a hard-power actor—demonstrating that its regional relevance extends beyond identity politics and into the realm of strategic balancing.

4 Dimensions of Turkish Influence

The following sections of this study will examine the concrete mechanisms through which Turkey pursues its geopolitical ambitions. In line with the previously described methodology, the analysis will be structured around three key dimensions of Turkish influence: political, economic, and societal. By examining its mechanisms through research, empirical data, and theoretical

²² Darko Tanasković: Neoosmanizam: Povratak Turske na Balkan, Službeni glasnik, 2010.

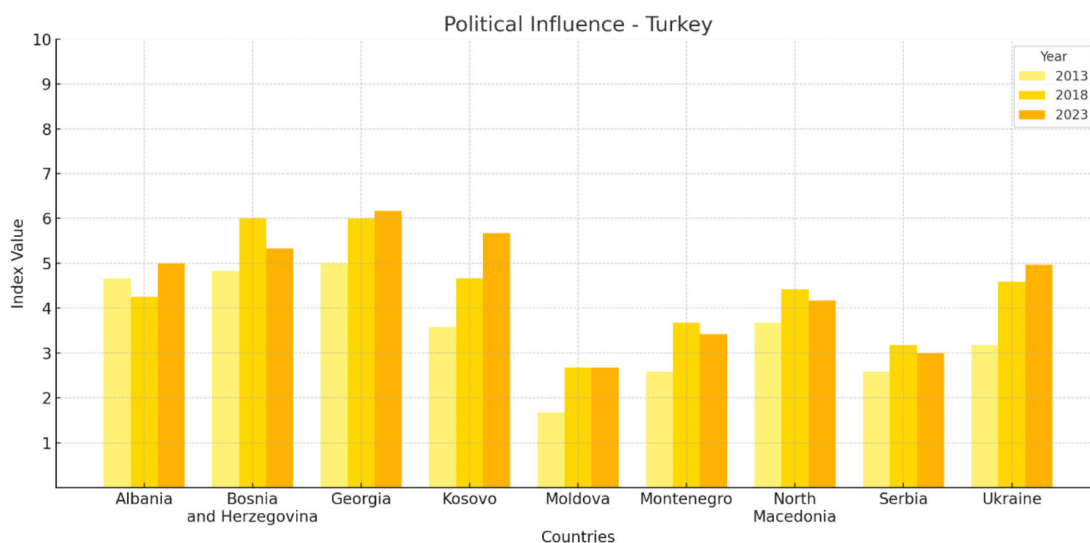
²³ Maryna Vorotnyuk: Turkey and the West's Black Sea Interests Converge More Often than Is Acknowledged—Opening Up Opportunities for Cooperation, 16 October 2024, available at: <https://www.atlanticcouncil.org/blogs/turkey-source/turkey-and-the-wests-black-sea-interests-converge-more-often-than-is-acknowledged-opening-up-opportunities-for-cooperation/> (last accessed: 02.07.2025).

insights, the next chapters will offer a nuanced perspective on how Turkey implements its geopolitical strategy in practice.

Political Influence: Evolution, Patterns, and the Political Sub-Index

Between 2013 and 2023, Turkey has pursued an active political engagement in the Western Balkans and Eastern Trio, driven by its ambition to maintain the status of a regional power. Unlike Russia—whose influence in the region has frequently relied on coercive measures in direct opposition to EU objectives—or China—whose growing footprint raises questions amid an as-yet ambiguous EU-China strategic rivalry—Turkey’s political influence tends not to pose an immediate geopolitical challenge. As both a NATO member and EU accession candidate, Ankara benefits from a broader diplomatic space in which is able to cultivate ties and advance its interests. Indeed, Turkey’s approach to regional diplomacy emphasises charm over force.²⁴ Even when disagreements arise—for example, over requests for the extradition of Gülenists—Ankara has opted not to downgrade relations with countries that chose to align their stance with the EU, a signal of respect for their sovereign decisions. Coercion is largely absent from Turkey’s toolbox; instead, political engagement is “carrot-driven,” supported by economic and cultural initiatives (to be discussed later), which together reinforce Ankara’s image as a constructive partner rather than a confrontational actor.

Figure 1: The Political Influence Sub-Index Over Time (2013–2023)



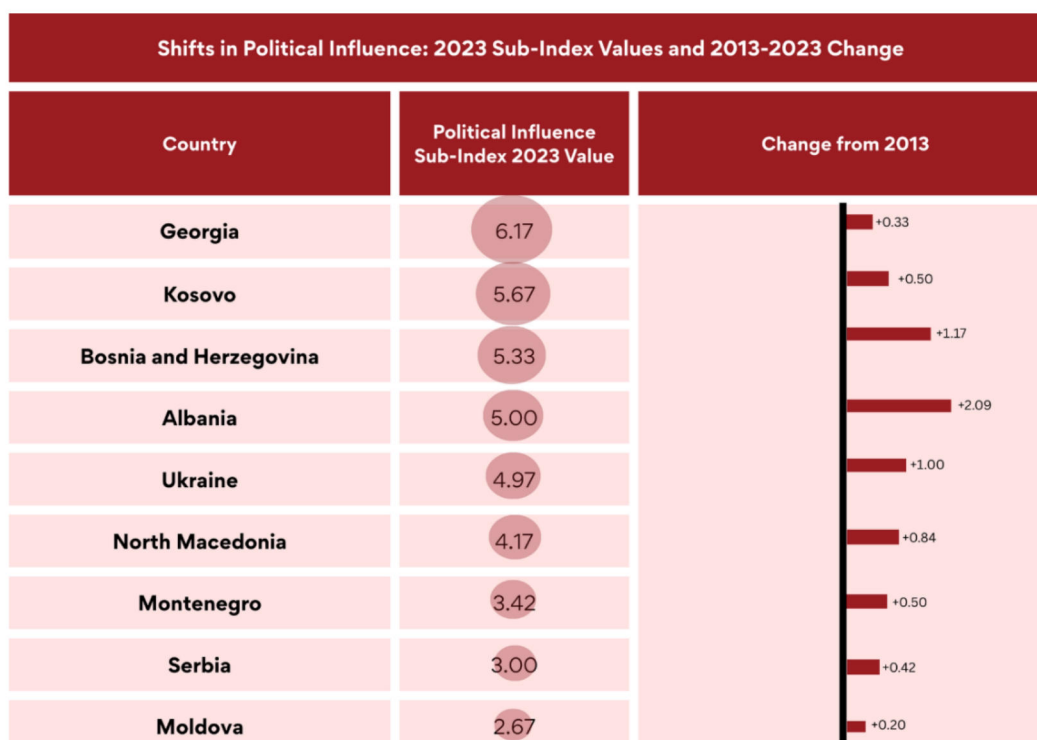
As illustrated in Figures 1 and 2, the InvigoratEU External Influence Index shows a modest yet consistent uptick in Turkey’s political reach across the two regions between 2013 and 2023. Kosovo experienced the most pronounced surge, underpinned by Ankara’s initiation of arms transfers to the Kosovo Security Force.²⁵ Ukraine also posted a marked rise, as Turkey

²⁴ Aslı Aydıntaşbaş: From Myth to Reality: How to Understand Turkey’s Role in the Western Balkans, 13 March 2019, available at: <https://ecfr.eu/publication/from-myth-to-reality-how-to-understand-turkeys-role-in-the-western-balkans/> (last accessed: 08.07.2025).

²⁵ Euronews Albania: Kosovo to Continue Modernizing Army with Weapons from Turkey, 28 July 2023, available at: <https://euronews.al/en/kosovo-to-continue-modernizing-army-with-weapons-from-turkey/> (last accessed: 08.07.2025).

positioned itself as a counter-weight to Russian influence in the Black Sea.²⁶ Montenegro saw notable gains, aligned with its NATO accession and deepened defence cooperation,²⁷ while Serbia's score has plateaued – further engagement is constrained by Ankara's strengthened ties with Kosovo.²⁸ Bosnia and Herzegovina recorded an initial rise in Turkish influence until 2018, followed by a decline by 2023. This downturn can be attributed to Ankara's reduced leverage over a more fragmented Bosniak political landscape and the stronger presence of alternative external actors, which jointly diluted the sense of Turkey as a privileged partner in Bosnia. Other partner and candidate countries likewise recorded modest increases, underscoring Turkey's steady, friendly foreign-policy approach that leverages its NATO membership and extensive diplomatic networks for gradual influence growth.

Figure 2: Political Influence Sub-Index Values in 2023 Compared to 2013



Turkey's appeal as a regional partner stems from its **consistent respect for the core national and geopolitical objectives of its Western Balkan and Eastern Trio neighbours**. Ankara endorses their Euro-Atlantic integration and strengthened defence cooperation with them.²⁹ In the Eastern Trio, Turkey also reinforces the territorial integrity of Ukraine, Georgia and Moldova—each of which has faced direct (in Georgia and Ukraine) or indirect (in Moldova) challenges coming from Russia—thereby upholding a rules-based regional order. In the Western

²⁶ Yevgeniya Gaber: The West Must Back Ukraine and Turkey to Counter Russia's Attempts to Control the Black Sea, 3 August 2023, available at: <https://www.atlanticcouncil.org/blogs/turkeysource/the-west-must-back-ukraine-and-turkey-to-counter-russias-attempts-to-control-the-black-sea/> (last accessed: 08.07.2025).

²⁷ Nazlı Yuzbasioglu: Türkiye, Montenegro Share possibility for Intensive Regional Cooperation: Montenegrin President, 8 June 2022, available at: <https://www.aa.com.tr/en/europe/turkiye-montenegro-share-possibility-for-intensive-regional-cooperation-montenegrin-president/2608873> (last accessed: 08.07.2025).

²⁸ Giorgio Cafiero: Turkey and the Intractable Serbia-Kosovo Dispute, 20 December 2023, available at: <https://trendsresearch.org/insight/turkey-and-the-intractable-serbia-kosovo-dispute/?srsltid=AfmBOoqqj-aKH-YHr0sCvSMPAxWfmGRl6mANDkOKLmywg1ebj2P4tPA0> (last accessed: 08.07.2025).

²⁹ Aslı Aydıntaşbaş: From Myth to Reality: How to Understand Turkey's Role in the Western Balkans, 2019.

Balkans, Turkey's recognition of Kosovo's independence is significant for Pristina, while its respect for Bosnia and Herzegovina's unity underscores Ankara's adherence to established institutional arrangements. Economically, Turkey bolsters growth and living standards through infrastructure investments and trade agreements, which is a shared national interest across governments in the region. However, Serbia represents a distinct case: Ankara's recognition of Kosovo's statehood means it cannot endorse Belgrade's territorial claims. Yet diplomatic pragmatism has prevailed, with Turkey continuing to support Serbia's EU integration and its economic development. This convergence on universally accepted goals provides a solid basis for Turkey's diplomatic activism, making its engagement both welcome and effective across the Western Balkans and Eastern Trio.

This commitment of Turkey to both regions has been confirmed by **a series of courtesy visits at the highest level**, reflecting Turkey's preference for direct personalised diplomacy. Between 2013 and 2023, each country in our analysis saw at least one summit-level exchange with Ankara. To illustrate, since President Erdoğan took presidency in 2014, he himself visited six of the nine states – Albania, Bosnia and Herzegovina, Montenegro, Serbia, Ukraine and Moldova – often returning multiple times to reinforce bilateral ties;³⁰ while the remaining three – Georgia, Kosovo, and North Macedonia – had hosted him in the preceding years during his tenure as prime minister. . These high level-visits often led to Turkey anchoring its political partnerships in formal strategic mechanisms. For example, Albania and Turkey created a High-Level Strategic Cooperation Council in January 2021, committing both capitals to annual consultations on defence, EU integration and cultural exchange.³¹ Ukraine and Turkey have convened under their Strategic Council since 2011³² and, since 2020, in a “Quadriga” 2+2 format of foreign and defence ministers.³³ Georgia and Turkey, too, formalised their own High-Level Council in 2016, describing Turkey as “Georgia's leading partnership in the region”.³⁴ Beyond these councils, Turkey has sometimes introduced special diplomatic arrangements. For example, Montenegro became the first – and so far only – country for which Ankara provides consular services in third states, offering assistance to Montenegrin nationals in 25 countries where Podgorica has no diplomatic presence.³⁵ Such tiered structures – ranging from routine presidential and ministerial visits to institutionalised strategic councils and unique service agreements – form the backbone of Turkey's bilateral diplomacy, ensuring that high-level contact is translated into sustained policy coordination and concrete cooperation.

To amplify its influence beyond bilateral channels, Turkey leverages **a wide array of regional and international fora**. Within NATO, Ankara has not only hosted strategic planning meetings – such as the 2018 Land Forces Conferences in Istanbul³⁶ – but also positioned itself as a bridge

³⁰ Presidency of the Republic of Türkiye, available at: <https://tccb.tr/en/> (last accessed: 08.07.2025).

³¹ The Government of Albania: A New Chapter on Path of Strategic Partnership with Turkey, 6 January 2021, available at: <https://kryeministria.al/en/newsroom/40734-2/> (last accessed: 08.07.2025).

³² Ministry of Foreign Affairs of the Republic of Türkiye, Relations between Türkiye and Ukraine, available at: <https://www.mfa.gov.tr/relations-between-turkey-and-ukraine.en.mfa> (last accessed: 08.07.2025).

³³ Embassy of Ukraine in the Republic of Türkiye, Political Relations between Ukraine and Türkiye.

³⁴ Ministry of Foreign Affairs of the Republic of Türkiye, Relations between Türkiye and Georgia, available at: <https://www.mfa.gov.tr/relations-between-turkiye-and-georgia.en.mfa> (last accessed: 08.07.2025).

³⁵ Levent Kenez: Montenegro Becomes the First and Only Country Turkey Provides Consular Services to in Third Countries, 10 August 2021, available at: <https://nordicmonitor.com/2021/08/montenegro-becomes-the-first-and-only-country-turkey-provides-consular-services-to-in-third-countries/> (last accessed: 08.07.2025).

³⁶ NATO: “How We Fight” Discussed at LC3 Conference, available at: <https://lc.nato.int/media-center/news/2018/12th-lc3-how-we-fight-> (last accessed: 09.07.2025).

between South-Eastern Europe and the Alliance's southern flank, sponsoring joint exercises and training programmes open to partners across the Western Balkans.³⁷ In the Organisation for Security and Co-operation in Europe (OSCE), Turkey contributes personnel to field missions in Bosnia and Herzegovina and Kosovo, while advocating within the Permanent Council for consensus-building measures that reinforce stability.³⁸ In the Western Balkans, Ankara has at times acted as a direct mediator, most notably by launching the Serbia-Bosnia and Herzegovina-Turkey trilateral consultation mechanism in 2010, which helped unlock diplomatic blockages and produced tangible confidence-building measures. Beyond security organisations, Ankara plays an active role in Black Sea Economic Cooperation (BSEC) and the Southeast European Cooperation Process (SEECP), both of which convene annual ministerial and heads-of-state meetings attended by Turkey's foreign minister or president. In BSEC, Turkey has championed infrastructure connectivity projects—such as corridor linkages to the Trans-Adriatic Pipeline³⁹—and in SEECP, it has spearheaded initiatives on counter-terrorism and migration management.⁴⁰ Turkey's record as a mediator spans both the neighbourhood and its near abroad: in the Western Balkans, Ankara launched the Serbia-Bosnia and Herzegovina-Turkey trilateral consultation mechanism in 2010 to overcome diplomatic deadlock,⁴¹ while in the Black Sea it played a central role in the Grain Initiative alongside Ukraine, Russia and the UN.⁴² By doing so, Turkey not only secures its own strategic interests but also positions itself as an indispensable broker of regional stability and multilateral cooperation.

Turkey's military engagement in the Western Balkans and Eastern Trio also combines multi-lateral deployments with bilateral cooperation. Since 2013, Turkish contingents have served continuously in NATO's SFOR/EUPM and the EU's Althea mission in Bosnia and Herzegovina – numbering around 250 personnel as of 2021⁴³ – while Kosovo hosts Ankara's second-largest KFOR contribution, peaking at 780 troops under Turkish command in 2023.⁴⁴ No standalone Turkish bases exist elsewhere, but defence-cooperation agreements extend Ankara's footprint: Bosnia and Herzegovina updated its Military Cooperation Plan in 2023 to include

³⁷ Birol Akduman: NATO's Southern Flank: The Evolution of Turkey's Strategic Role and Its Implications for Regional Security NATO's Southern Flank: The Evolution of Türkiye's Strategic Role and Its Implications for Regional Security, *İnsan ve Toplum Bilimleri Araştırmaları Dergisi*, 12(5), 2951-2968.

³⁸ Munevver Cebeci, Turkey and the Organization for Security and Cooperation in Europe, in: Sasha Toperich Aylin Ünver Noi (ed.), *Turkey and Transatlantic Relations*, pp. 65-81.

³⁹ Deniz Unsal: Trans Adriatic Pipeline (TAP): A New Cooperation Format between EU, Turkey and Azerbaijan, 15 January 2021, available at: <https://www.aa.com.tr/en/analysis/analysis-trans-adriatic-pipeline-tap-a-new-co-operation-format-between-eu-turkey-and-azerbaijan/2111370> (last accessed: 09.07.2025).

⁴⁰ Hatice Ozdemir Tosun: Turkey Hosts SE Europe Cooperation Process Meeting, 6 November 2020, available at: <https://www.aa.com.tr/en/europe/turkey-hosts-se-europe-cooperation-process-meeting/2034880> (last accessed: 09.07.2025)

⁴¹ Between 2009 and 2011, Turkey mediated through the Ankara-Belgrade-Sarajevo trilateral mechanism, which facilitated visa liberalisation, the appointment of a BiH ambassador to Belgrade, and Serbia's adoption of the Srebrenica Declaration – earning Ankara recognition as a constructive regional broker.

⁴² UN: Black Sea Grain Initiative Joint Coordination Centre, available at: <https://www.un.org/en/black-sea-grain-initiative> (last accessed: 09.07.2025).

⁴³ Evrensel: Türkiye'nin hangi ülkede, kaç askeri var, hangi gerekçelerle bulunuyor?, available at: <https://www.evrensel.net/haber/395467/turkiyenin-hangi-ulkede-kac-askeri-var-hangi-gerekcelerle-bulunuyor> (last accessed: 09.07.2025).

⁴⁴ Kosovo Online: Turkey at the head of KFOR for the first time, is there a reason for Serbia to be concerned?, 8 October 2023, available at: <https://www.kosovo-online.com/en/news/analysis/turkey-head-kfor-first-time-there-reason-serbia-be-concerned-8-10-2023> (last accessed: 09.07.2025).

comprehensive training and logistics support;⁴⁵ Serbia and Turkey's 2019 Framework Military Agreement covers joint exercises, EOD and R&D exchanges;⁴⁶ North Macedonia has sent hundreds of officers to Turkish academies and refreshed its military-financial pact in 2019;⁴⁷ and in 2017, Montenegro signed a bilateral defence plan with Turkey.⁴⁸ This approach lets Ankara swiftly deploy forces or advisors where it sees fit, shape mission mandates to its strategic advantage, and weave Turkish training standards into local militaries for enduring influence. These activities undoubtedly consolidate Turkey's regional influence, but they unfold primarily through NATO frameworks. As such, they reinforce allied security objectives rather than constituting third-actor interference in the Western Balkans and Eastern Trio.

Building on its operational presence in Western Balkans missions and bilateral defence pacts, Turkey's emergence as a **regional arms supplier** further cements its footprint. Under its strategic partnership with Kosovo, Ankara donated technical equipment and uniforms before concluding a Bayraktar-drone deal in 2023.⁴⁹ This move also led Serbia to abandon earlier plans to acquire Turkish drones, as Belgrade sought to avoid deepened military entanglement with Ankara in light of its security cooperation with Pristina.⁵⁰ In Ukraine, military cooperation had already been building for several years before the 2022 war, starting with early Bayraktar deliveries in 2019⁵¹ and expanding into broader naval and drone projects. The launch of a Baykar assembly plant in 2024⁵² therefore symbolised not a sudden wartime shift, but the consolidation of a long-term partnership aimed at enhancing Kyiv's resilience and countering Russian influence in the Black Sea. Georgia likewise augmented its arsenal with Turkish-built armoured vehicles in 2022-23.⁵³ These transfers not only enhance partners' capabilities but also strengthen Turkey's defence-industrial ties across the region.

In line with its preference for non-confrontational engagement, **Turkey generally steers clear of direct interference in the domestic politics of its Western Balkan and Eastern European partners.**⁵⁴ Its involvement is channelled through parliamentary friendship groups, joint

⁴⁵Talha Ozturk: Bosnia, Türkiye sign military cooperation plan to strengthen future activities, 31 August 2023, available at: <https://www.aa.com.tr/en/europe/bosnia-turkiye-sign-military-cooperation-plan-to-strengthen-future-activities/2980395> (last accessed: 09.07.2025).

⁴⁶Maja Zivanovic/Hamdi Firat Buyuk: Serbia and Turkey Pledge to Boost Defence Cooperation, 7 October 2019, available at: <https://balkaninsight.com/2019/10/07/serbia-and-turkey-pledge-to-boost-defence-cooperation/> (last accessed: 09.07.2025).

⁴⁷Ministry of Defence of the Republic of North Macedonia: Turkey continues to support North Macedonia in NATO – the Minister of National Defense Akar in an official visit to our country, 3 April 2019, available at: <https://mod.gov.mk/турција-продолжува-да-ја-поддржува-се/> (last accessed: 09.07.2025).

⁴⁸European Commission: Montenegro 2018 Report. SWD(2018) 150 final.

⁴⁹Euronews Srbija: Naoružavanje Kosova povećava bezbednosni rizik: Turska slanjem Bajraktara potvrđuje ulogu glavnog snabdevača Prištine, 20 July 2023, available at: <https://www.euronews.rs/srbija/politika/94019/naoru-zavanje-kosova-povecava-bezbednosni-rizik-turska-slanjem-bajraktara-potvrduje-ulogu-glavnog-snaddevaca-pristine/vest> (last accessed: 09.07.2025).

⁵⁰Vuk Vuksanović/Filip Ejduš: Wings of Change: The Coming Drone Proliferation in the Western Balkans. Belgrade Centre for Security Policy, May 2023.

⁵¹Daily Sabah: Ukraine, Turkey have signed deal for 12 Bayraktar TB2 UAVs, Poroshenko says, 12 January 2019, available at: <https://www.dailysabah.com/defense/2019/01/12/ukraine-turkey-have-signed-deal-for-12-bayraktar-tb2-uavs-poroshenko-says> (last assessed: 09.07.2025).

⁵²Pesha Magid: Turkey's drone maker Baykar begins to build plant in Ukraine, 7 February 2024, available at: <https://www.reuters.com/business/aerospace-defense/turkeys-drone-maker-baykar-begins-build-plant-ukraine-2024-02-06/> (last accessed: 10.07.2025).

⁵³Georgian Public Broadcaster: Georgian Defence Forces get NATO-standard armoured vehicles from Turkey, 7 October 2022, available at: <https://itv.ge/lang/en/news/georgian-defence-forces-get-nato-standard-armoured-vehicles-from-turkey/> (last accessed: 10.07.2025).

⁵⁴Mehmet Ugur Ekinci: Turkey's Balkan Policy and Its Skeptics, *Insight Turkey*, 21(2), 37-49.

legislative seminars and civil-service training programmes rather than campaign support, party funding or public endorsements. Ankara does not bankroll independent media outlets, lobby for electoral-law changes or take part in referendum campaigns; instead, it sustains regular dialogue with a wide range of political actors and provides technical assistance aimed at strengthening administrative capacity. While this pattern broadly holds, three contexts illustrate more selective political entanglements. In Bosnia and Herzegovina, Ankara's long-standing alignment with Bosniak elites – particularly through personal ties between President Erdoğan and SDA leadership – has at times reinforced perceptions of partisan favouritism. In Kosovo, Turkey's role in bolstering state institutions and the Kosovo Security Force, though framed as strategic partnership, is politically consequential given the unresolved status dispute with Serbia. And in Serbia's Sandžak region, Turkey's close links with Bosniak political and religious leaders similarly blur the line between cultural diplomacy and domestic political influence. However, taken together, by limiting itself to these less overt channels, Turkey preserves its image as a constructive partner while quietly reinforcing its diplomatic foothold and goodwill in the region.

While Ankara typically shuns overt meddling in partner states, its **campaign against the perceived internal enemies abroad – most prominently the Gülen movement, but also Kurdish activists – is a glaring exception**. Since the failed 2016 coup, Turkish authorities have pressed governments to shutter Gülen-linked schools and media outlets, freeze assets and extradite alleged affiliates. In Albania, Tirana closed several institutions tied to Gülen network in 2022.⁵⁵ North Macedonia faced demands to hand over some 15 suspects and to prosecute or seize assets of others which many in Skopje feared could become a de facto precondition for NATO accession and interpreted as political blackmail. In practice, however, the issue did not block the country's Euro-Atlantic path, as Ankara went on to ratify North Macedonia's NATO accession protocol without delay. Bosnia saw staff departures at several Gülen schools under mounting pressure from Ankara.⁵⁶ Moldova illegally detained and deported seven Turkish teachers in a joint operation with Turkish intelligence in September 2018, provoking European Court of Human Rights fines and ongoing legal challenges.⁵⁷ Serbia extradited Kurdish activist Cevdet Ayaz in December 2017 despite a United Nations order to delay his removal.⁵⁸ Ukraine, under bilateral security pacts, sent at least three alleged FETÖ members back to Turkey.⁵⁹ These interventions reveal Turkey's willingness to weaponise neighbourly ties to enforce an internal security agenda, posing a malign threat to the rule of law and international norms in the very countries it purports to partner with.

⁵⁵ Tirana Times: Albania closes two education institutions tied to Gulen network, sparking debate over Turkish pressure, 23 September 2022, available at: <https://www.tiranatimes.com/moe-closes-two-education-institutions-tied-to-gulen-network/> (last accessed: 10.07.2025).

⁵⁶ Rodolfo Toè: Gulen Schools Fight Provokes New Tensions in Bosnia, 26 July 2016, available at: <https://balkaninsight.com/2016/07/26/gulen-schools-fight-provokes-new-tensions-in-bosnia-07-26-2016/> (last accessed: 10.07.2025).

⁵⁷ Madalin Necsutu: Moldova to Reopen File on Illegal Rendition of Turkish Teachers, 17 February 2023, available at: <https://balkaninsight.com/2023/02/17/moldova-to-reopen-file-on-illegal-rendition-of-turkish-teachers/> (last accessed: 10.07.2025).

⁵⁸ Maja Zivanovic: Serbia Ignores UN and Extradites Kurd to Turkey, 26 December 2017, available at: <https://balkaninsight.com/2017/12/26/serbia-extradited-kurdish-political-activist-to-turkey-12-26-2017/> (last accessed: 10.07.2025).

⁵⁹ Daily Sabah: Ukraine extradites senior FETÖ members to Turkey, 6 January 2021, available at: <https://www.dailysabah.com/turkey/investigations/ukraine-extradites-senior-feto-members-to-turkey> (last accessed: 10.07.2025).

Looking ahead to 2025–35, Turkey’s regional footprint is likely to deepen along three trajectories: (1) **formalising cooperation** through regular strategic-council meetings and specialised working groups that embed Ankara within partner administrations; (2) **intensifying its security profile** via expanded officer training, larger joint exercises—particularly with recent NATO entrants—and targeted arms exports to cement interoperability; and (3) **sustaining influence in candidate countries even if political ties cool**, which could occur if some join the EU and if EU-Turkey relations fray over diverging views on the rule of law, democracy and human rights.

These trends are unlikely to depend solely on President Erdoğan’s continued rule. Major shifts in Turkish foreign policy are unlikely in the event of a leadership change; opposition parties have criticised Erdoğan’s domestic governance far more sharply than his external posture.⁶⁰ When it comes to the Western Balkans and Eastern Trio, the main instruments are rooted in structural interests of the Turkish state and thus expected to endure regardless of leadership change. This suggests that even a post-Erdoğan Turkey will likely pursue similar regional ambitions, reinforcing the forecast of sustained Turkish political presence through 2035.

Economic Influence: Evolution, Patterns, and the Economic Sub-Index (2013–2023)

Over the past decade, Turkey has systematically deepened its economic footprint across the Western Balkans and Eastern Trio, transforming **from a niche trading partner into a multisectoral force**. Ankara has deftly combined trade liberalisation, concessional financing, and high-profile infrastructure projects, creating a complex web of durable economic linkages. This strategy—guided by the “Strategic Depth” doctrine—aimed to diversify export markets, secure new supply corridors, but also project soft power, serving both commercial and geopolitical ends. Yet Turkey’s path forward demands agile recalibration: navigating competition from deep-pocketed rivals and strategically pivoting toward green/digital priorities that will define the next decade of its regional influence.

Between 2013 and 2023, Turkey’s economic sway in the Western Balkans and the Eastern Trio deepened across the board yet unfolded in distinctly uneven rhythms (see Figures 3 and 4). In North Macedonia, Ankara’s footprint surged most dramatically, driven by large-scale infrastructure loans, major transport and energy linkages, and the steady expansion of bilateral trade agreements that together cemented Turkey’s reputation as a go-to development partner. Georgia and Ukraine also enjoyed a clear upward trajectory, buoyed by joint agricultural ventures, growing Turkish-backed manufacturing zones and the emergence of Turkish e-commerce platforms that opened new markets for local producers. Across Albania, Kosovo, Montenegro, and Bosnia and Herzegovina, Turkey’s presence broadened more gradually but steadily: a series of medium-scale construction contracts, targeted credit lines and participation in tourism and hospitality investments knitted Ankara into the regional economic fabric without triggering abrupt market dislocations. By contrast, Moldova’s momentum stalled under the pressure of generous European Union grant programmes, while in Serbia Turkish engagement remained modest—focused on selective construction work and textile industry—reflecting the careful calibration of Ankara’s outreach in light of Serbia’s complex geopolitical balancing. Altogether, these varied experiences confirm that Turkish economic influence in the

⁶⁰ Alan Makovsky: An opposition foreign policy in Erdoğan’s shadow, 8 May 2023, available at: <https://www.mei.edu/publications/opposition-foreign-policy-erdogans-shadow> (last accessed: 15.08.2025).

region has been propelled less by impersonal market forces and more by a succession of strategic government initiatives, negotiated deals and high-profile flagship projects.

Figure 3: The Economic Influence Sub-Index Over Time (2013–2023)

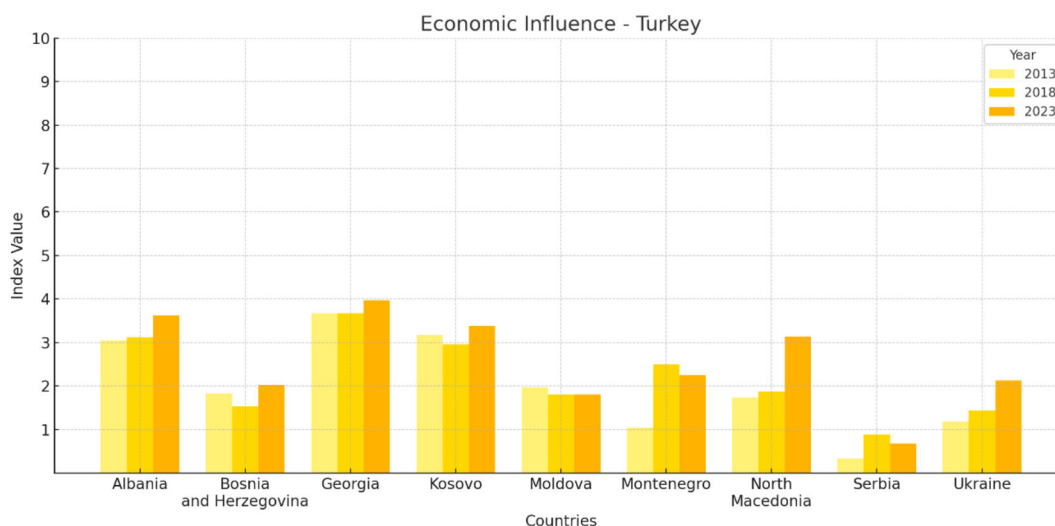
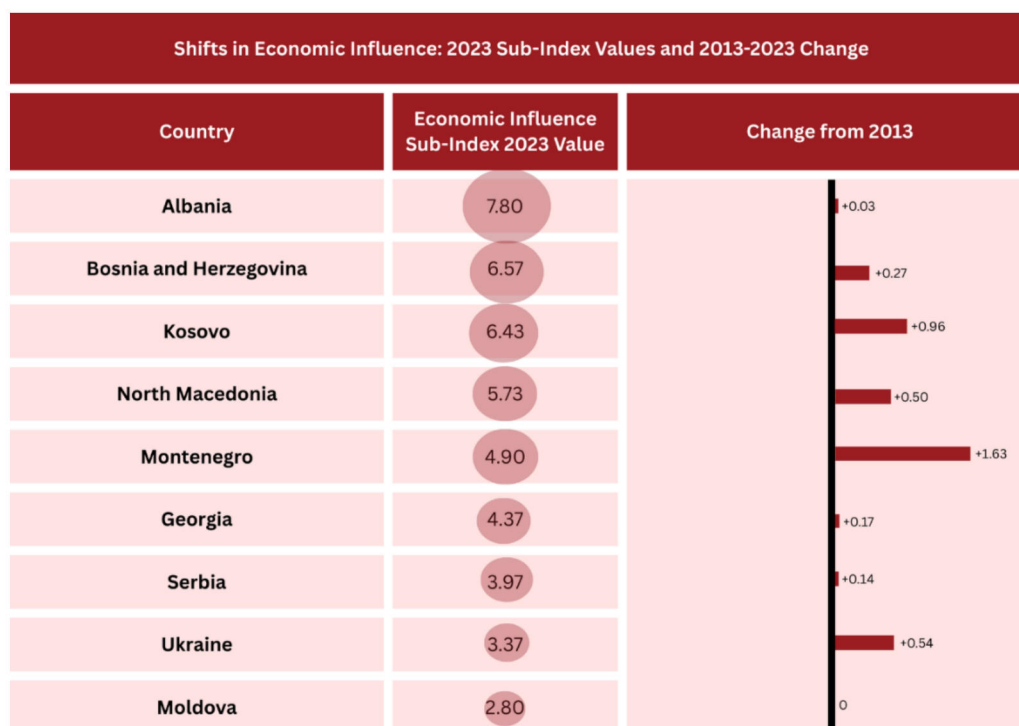


Figure 4: Economic Influence Sub-Index Values in 2023 Compared to 2013



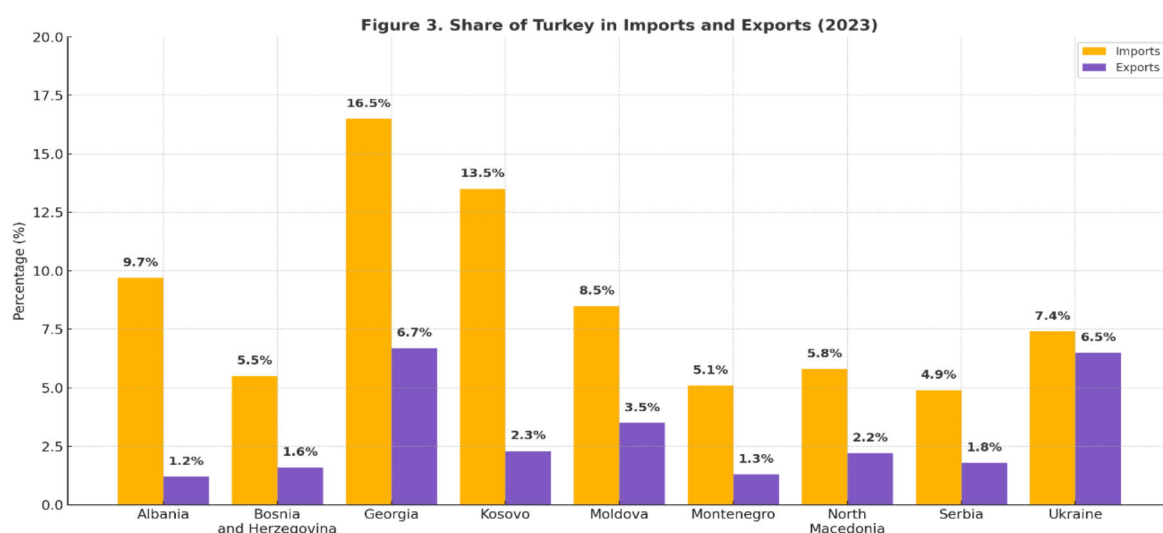
Turkey's exports to the region—spanning machinery, construction materials, textiles, and consumer goods—have shown significant growth, cementing its role as a key supplier and securing deep market penetration.⁶¹ This trend is vividly illustrated by a surge in Turkish goods imports

⁶¹ Data on Turkish exports are sourced from the WIIW (Vienna Institute for International Economic Studies) database to ensure cross-country comparability.

across both regions, with Albania's intake alone increasing from €235 million in 2013 to €778 million in 2023, raising Turkey's import share in Albania's GDP from 2.4% to 3.6%. Similarly, North Macedonia recorded a substantial jump from €238 million to €649 million, driven by an influx of Turkish construction equipment and packaged foods. In the Western Balkans, Kosovo tripled its intake of Turkish goods, while Montenegro saw over twofold growth, largely via hotel and hospitality supply chains. This pattern of market capture is also significant in the Eastern Trio, particularly in Ukraine, where imports surged to €4,367 million. Separately, in Serbia, Turkish imports also experienced a dramatic rise to €1,712 million. This trend underscores Turkey's success in leveraging existing preferential trade agreements (FTAs)—progressively expanded to cover services and digital trade—to lock in Ankara as a low-tariff supplier, effectively embedding its products and standards within the host economies.

While Turkey has successfully captured regional markets, the reciprocal flow of exports from the Western Balkans and Eastern Trio signals a **growing, albeit asymmetric** (as illustrated in Figure 5), **commercial interdependence**.⁶² Regional exporters have increasingly tapped into Ankara's manufacturing ecosystem, with Albanian steel, dairy, and olive oil finding new buyers and North Macedonian textile and auto-parts firms more than tripling their shipments to Turkey. The strategic utility of Turkey as a trade partner was further highlighted by Ukrainian sunflower oil and grain exporters, who utilised Turkish ports as alternative entry points during the Black Sea naval blockades following Russia's full-scale invasion of Ukraine in 2022. While these developments signal a degree of two-way commercial engagement, the volumes remain modest when compared to the influx of Turkish goods. This apparent trade asymmetry is a calculated outcome, as Turkey's dual approach embeds import dependencies while simultaneously targeting investments in key regional export sectors—especially agriculture—to secure specific supply chains for its own economy, thereby enhancing its resilience and influence. The result is the creation of a mutually beneficial, albeit unequal, economic corridor that reinforces Turkey's position as the dominant partner.

Figure 5: Relative Importance of Turkey in Trade Flows of Western Balkans and Eastern Trio, 2023



⁶² Data on Turkish imports and exports inflows are sourced from the WIIW (Vienna Institute for International Economic Studies) database to ensure cross-country comparability.

Between 2013 and 2023, **net Turkish foreign direct investment (FDI)** into the region surged significantly, albeit unevenly, reflecting targeted strategic deployments.⁶³ Albania attracted €48 million in 2013, rising to €179 million by 2023—approximately 12% of its annual FDI inflows—primarily channelled into renewable energy and road construction. North Macedonia recorded a leap from €23 million to nearly €185 million, driven by greenfield investments in plastics and food processing. Kosovo experienced a dip in 2018 but rebounded to €58 million in 2023 as Turkish banks and telecom firms re-entered the market. Montenegro's FDI inflows also rose markedly from €22.6 million to €47 million. Georgian inflows climbed from \$51.4 million to \$109.5 million. These flows underscore a strategic preference for sectors generating visible “bread-and-butter” benefits and reinforcing Ankara's image as a development partner, further cementing its influence.

The accumulated presence of Turkish capital, or **cumulative FDI stock**,⁶⁴ is most pronounced in Albania, where Turkish firms constitute roughly 8% of total FDI stock, including major projects like the Tirana–Elbasan highway concession. In Montenegro and Bosnia and Herzegovina, stock levels hover around 3–5%, predominantly via construction conglomerates and regional banking subsidiaries. In Georgia, Turkish investors hold several agribusiness estates and logistics platforms, elevating their share to just over 6% of the total. While Serbia and Ukraine show lower FDI stock percentages (0.7% and 1%, respectively), an upward trend signals growing—albeit nascent—long-term commitment. Turkey leverages FDI not merely for economic returns but as an intentional soft-power instrument for enduring influence. By investing in critical, high-visibility sectors, Turkey positions itself as an indispensable development partner, fostering goodwill and potentially amplifying political leverage. This strategy creates embedded economic interests that are difficult to disentangle, ensuring persistent presence and clout even amid geopolitical shifts.

Turkish financial institutions and conglomerates have established themselves as key pillars of influence across the region, securing both a financial and physical footprint. **The expansion of concessional and market-rate lending** by entities like Turk Eximbank has become a powerful instrument of economic statecraft, as evidenced by its targeted credit lines for infrastructure and energy projects in Albania and North Macedonia.⁶⁵ Turkish banks, such as Ziraat Bankası and Halkbank, have become prominent lenders in Albania and North Macedonia, filling critical financing gaps where EU funds are constrained and thereby entrenching Turkey as an indispensable development partner. Beyond lending, direct foreign investment has enabled Turkish conglomerates to secure significant stakes in major infrastructure tenders. For instance, Limak Holding secured a public–private partnership for airport management in Kosovo,⁶⁶ while Cengiz Holding was involved in major highway sections in North Macedonia.⁶⁷ Even in Serbia, where the Turkish presence remains modest, Turkish banks have acquired majority shares in

⁶³ Data on FDI inflows are sourced from the WIIW (Vienna Institute for International Economic Studies) database to ensure cross-country comparability.

⁶⁴ Data on FDI stock are sourced from the WIIW (Vienna Institute for International Economic Studies) database to ensure cross-country comparability.

⁶⁵ Turk Eximbank: International Project Loans, available at: <https://eximbank.gov.tr/en/product-and-services/buyer-s-credits/international-project-loans> (last accessed: 10.07.2025).

⁶⁶ Ex-Yu Aviation News: Limak extends Pristina airport concession, 11 September 2024, available at: <https://www.exyuaviation.com/2024/09/limak-extends-pristina-airport.html> (last accessed: 10.07.2025).

⁶⁷ Bechtel: Bechtel Selected to Build Two New Motorways in North Macedonia, 9 March 2023, available at: <https://www.bechtel.com/press-releases/bechtel-selected-to-build-two-new-motorways-in-north-macedonia/> (last accessed: 10.07.2025).

Serbian commercial banks.⁶⁸ This approach, which moves from strategic lending to direct ownership of vital infrastructure, creates long-term economic footholds that are difficult for host countries to remove, granting Ankara potent leverage to shape economic policies and align diplomatic postures, ultimately integrating these states into broader Turkish logistical and economic networks.

This strategic financial engagement is buttressed by a sophisticated array of operational mechanisms, with **preferential trade agreements** serving as the foundational legal platform. Frameworks established with Western Balkan and Eastern Trio countries have been progressively upgraded with the goal of increasing trade volume, cementing Ankara's position as a long-term commercial partner in the region. At the same time, Ankara systematically links high-profile loan agreements to strategic dialogues, reinforcing a "politics-and-business" dynamic—as exemplified by the Turkey-brokered Belgrade-Sarajevo highway project, a loan-backed initiative designed to promote peace and stability while securing Ankara's position as a key regional mediator.⁶⁹ This financial leverage, often accompanied by technical assistance, bolsters Ankara's role as a "prime lender" for capital projects and reveals a highly integrated statecraft model where economic engagement is inseparable from geopolitical objectives. This is further extended into sectoral influence, as seen in Turkey's cultivation of agricultural value chains through subsidised programmes in Moldova and the reconstruction of irrigation systems in Ukraine,⁷⁰ which interweaves food security with bilateral cooperation.⁷¹ Similarly, through TİKA (Turkish Cooperation and Coordination Agency), Turkey supports initiatives such as agribusiness capacity building in Georgia⁷² and contributes to the cultural and tourism revitalisation of Montenegrin coastal towns,⁷³ showcasing a multi-layered approach that fosters resilient local partnerships and strengthens Ankara's long-term presence.

As Turkey's economic footprint deepens, Ankara gains significant informal leverage to press for favourable diplomatic alignments, a dynamic that can trigger domestic resistance in capitals wary of sovereignty erosion. This is particularly visible in the sustained pressure on North Macedonia and Albania regarding extraditions of alleged FETO members, as well as documented legislative interference in Moldova concerning national-security deportations. **Leveraging economic ties for political pressure—especially on sensitive domestic issues like judicial processes or media freedoms—risks blowback, as it can fuel perceptions of meddling in sovereign affairs and ultimately hinder deeper long-term integration.** This internal friction

⁶⁸ Daily Sabah: Turkey's Halkbank acquires Serbia's Cacanska Banka, 20 March 2015, available at: <https://www.dailysabah.com/finance/2015/03/20/turkeys-halkbank-acquires-serbias-cacanska-banka> (last accessed: 10.07.2025).

⁶⁹ Sergio Cantone: Can a motorway to Bosnia strengthen the ties between Serbia and Turkey?, 14 October 2024, available at: <https://www.euronews.com/2024/10/14/can-a-motorway-to-bosnia-strengthen-the-ties-between-serbia-and-turkey> (last accessed: 10.07.2025).

⁷⁰ UkrAgroConsult: Ukraine and Turkey agree to expand purchases of Ukrainian agricultural products, 14 March 2025, available at: <https://ukragroconsult.com/en/news/ukraine-and-turkey-agree-to-expand-purchases-of-ukrainian-agricultural-products> (last accessed: 10.07.2025).

⁷¹ Moldova.Org: Moldova, Turkey sign cooperation programme on food security, 18 January 2011, available at: <https://www.moldova.org/en/moldova-turkey-sign-cooperation-programme-on-food-security-216269-eng> (last accessed: 10.07.2025).

⁷² TİKA: TİKA Supports the Agricultural Development of Georgia, 12 November 2019, available at: <https://tika.gov.tr/en/detail-tika-supports-the-agricultural-development-of-georgia/> (last accessed: 10.07.2025).

⁷³ Government of Montenegro: Ibrahimović, Kayalar: TİKA makes a significant contribution to strengthening Montenegro-Türkiye relations, 26 March 2025, available at: <https://www.gov.me/en/article/ibrahimovic-kayalar-tika-makes-a-significant-contribution-to-strengthening-montenegro-turkiye-relations> (last accessed: 10.07.2025).

is compounded by external geopolitical flashpoints, such as escalations in eastern Ukraine or resurgent Balkan nationalism, which may compel Ankara into delicate balancing acts that test its “multidirectional” foreign policy. The Ukraine case is particularly illustrative, where Turkey’s role as a mediator and arms supplier highlights both its strategic relevance and the inherent risks of navigating complex conflicts, rendering its regional strategy vulnerable to external shocks.

Ankara’s influence also faces significant challenges from a crowded and competitive regional arena. The EU, China, and Gulf states are actively offering subsidies, investments, and market access, and the further expansion of China’s Belt and Road or Gulf infrastructure funding could undercut Turkish bids or dilute Ankara’s comparative advantage. This intense competition forces Turkey into constant adaptation and innovation, complicating its efforts to maintain exclusive influence. Furthermore, the long-term viability of Turkey’s “Strategic Depth” doctrine is intrinsically tethered to its own internal stability. The country’s ongoing macroeconomic instability—including lira depreciation, high inflation, and rising sovereign risk premiums—could constrain Ankara’s capacity to extend new loans or guarantee projects. This internal vulnerability risks stalling key projects mid-implementation, undermining Turkey’s credibility as a reliable financier, and inviting competitors to fill voids, thereby diminishing its long-term reliability and soft-power gains.

Looking ahead, Ankara has signaled a clear strategic pivot toward modernising its influence toolkit, with proposed energy corridor initiatives⁷⁴ and the ambitious aim of transforming the Montenegrin port Bar⁷⁵ into Eurasian transit hubs. This transition from traditional construction to high-value, future-oriented sectors like renewable energy and transport infrastructure is designed to create long-term dependencies and ensure Turkey’s competitive advantage. In parallel, Ankara appears increasingly interested in formalising its role as a regional economic stakeholder, aiming to anchor its influence in more systemic and sustainable frameworks.⁷⁶ The long-term viability of these ambitions, however, is intrinsically linked to Turkey’s own economic resilience and its capacity to manage global headwinds and geopolitical complexities – **a significant uncertainty given current challenges such as persistently high inflation, currency volatility, and concerns over fiscal reliability.** These internal constraints may limit Ankara’s ability to consistently project economic influence abroad, even as it seeks to entrench itself in the two region’s future economic architecture.

Societal Influence: Evolution, Patterns and the Societal Sub-Index

Turkey’s societal influence in the Western Balkans and Eastern Trio is deeply rooted in historical ties and contemporary strategic ambitions, leveraging a multifaceted soft power approach. **The Ottoman legacy, spanning centuries of shared history, forms a profound bedrock for Turkey’s engagement,** manifesting in shared cultural practices, architectural heritage, and,

⁷⁴ Igor Todorović: East-West Energy Corridor to extend from Turkey to Montenegro, 24 July 2024, available at: <https://balkangreenenergynews.com/east-west-energy-corridor-to-extend-from-turkey-to-montenegro/> (last accessed: 11.07.2025).

⁷⁵ Betül Alakent: Türkiye positions itself among leaders in investments in Montenegro, 3 December 2024, available at: <https://www.dailysabah.com/business/economy/turkiye-positions-itself-among-leaders-in-investments-in-montenegro> (last accessed: 11.07.2025).

⁷⁶ Muhittin Ataman/ Metin Yücekaya/ Ömer Naim Küçük: Türkiye’s Increased Activism in International Organizations as an Initiator State, in: Insight Turkey, 27(1), 2025, 87–112.

crucially, a significant Muslim population in the Western Balkans. This historical connection is actively leveraged as a source of common identity and brotherhood, providing a fertile ground for Turkey's soft power initiatives. Beyond history, contemporary tools of soft power, including burgeoning tourism, extensive educational programmes, and a vibrant cultural outreach, are strategically deployed to reinforce these ties and project a modern, dynamic image of Turkey. The proliferation of Turkish cultural centres, the increasing popularity of Turkish television series, and the consistent growth in Turkish tourist arrivals across the region demonstrate a comprehensive and adaptable strategy. This multi-pronged engagement aims to create a deep societal resonance that complements Turkey's broader foreign policy objectives, ensuring a lasting presence and influence.

However, **this influence is not uniformly embraced**. For populations like the Serbs and Montenegrins, the historical narrative of Ottoman rule is viewed through a negative lens, often characterised as centuries of occupation. Their modern national identities were, in fact, forged in opposition to this historical period, with national myths and historical memory centred on resistance and liberation.⁷⁷ Despite this deep-seated historical friction, Turkey's strategy attempts to bridge this gap by focusing on shared cultural and economic interests, framing its engagement as a forward-looking partnership. Initiatives such as the restoration of historical sites, not as symbols of imperial rule but as shared cultural heritage, and the promotion of popular culture like Turkish TV series, aim to create a new, positive narrative that bypasses historical grievances. This multi-pronged engagement aims to create a deep societal resonance that complements Turkey's broader foreign policy objectives, ensuring a lasting presence and influence.

As seen in Figures 6 and 7, **Turkey's societal influence in the Western Balkans and Eastern Trio reveals diverse patterns, with a clear divergence between the two regions**. The InvigoratEU Index indicates that Turkey's societal footprint is consistently stronger and more deeply embedded in the Western Balkans, where it is generally higher than in the Eastern Trio. This pattern suggests that Turkey's influence is strategically concentrated where historical and religious commonalities are strongest. Within this broader trend, specific national patterns emerge. For example, Turkey's influence in Kosovo has seen a significant increase, a trajectory that appears linked to the recalibration of the country's foreign policy under the second Kurti government and the strategic deployment of Turkish initiatives. Conversely, in Serbia, Turkish societal influence remains comparatively lower than in its Western Balkan neighbours, facing inherent limitations due to a historical narrative of "500 years of slavery," which continues to shape public perception among the majority population. This highlights how deep-seated historical memory can act as a significant barrier to Turkey's soft power. Other countries, such as Montenegro and North Macedonia, have experienced a steady increase in influence, while states like Moldova and Albania have seen a more stable or stagnated pattern. This differentiated impact across the region demonstrates how the effectiveness of Turkey's societal soft power is not a universal phenomenon but is dictated by the varying receptiveness of each society and the underlying historical context. For policymakers, this suggests that the success of Turkey's engagement is contingent on leveraging shared historical and cultural ties to achieve its foreign policy goals.

⁷⁷ Goran Tepšić: Nacionalni identitet i (zlo)upotreba "drugog", *Godišnjak Fakulteta političkih nauka*, 6(8), 69-90.

Figure 6: The Societal Influence Sub-Index Over Time (2013–2023)

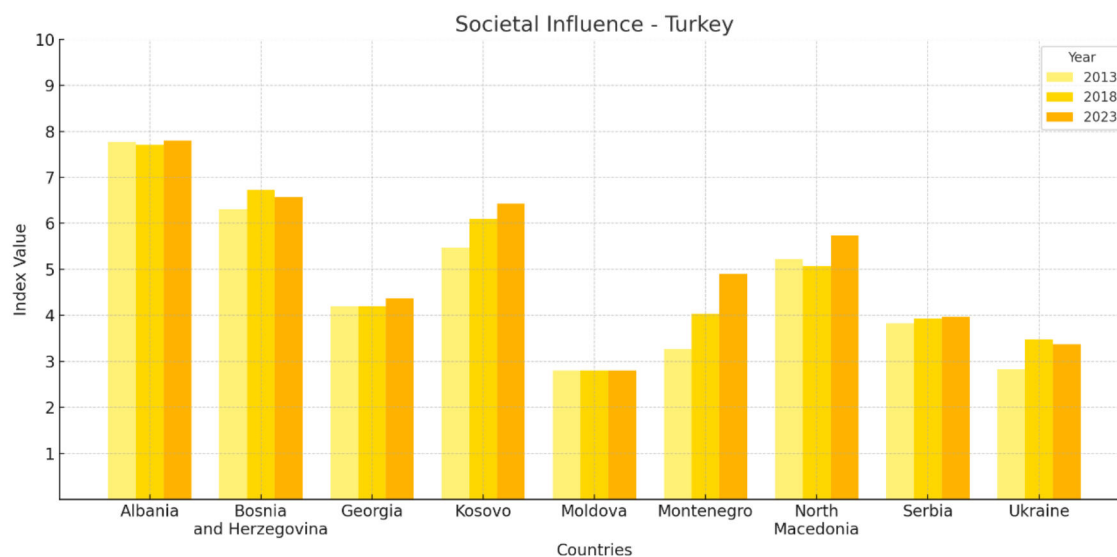
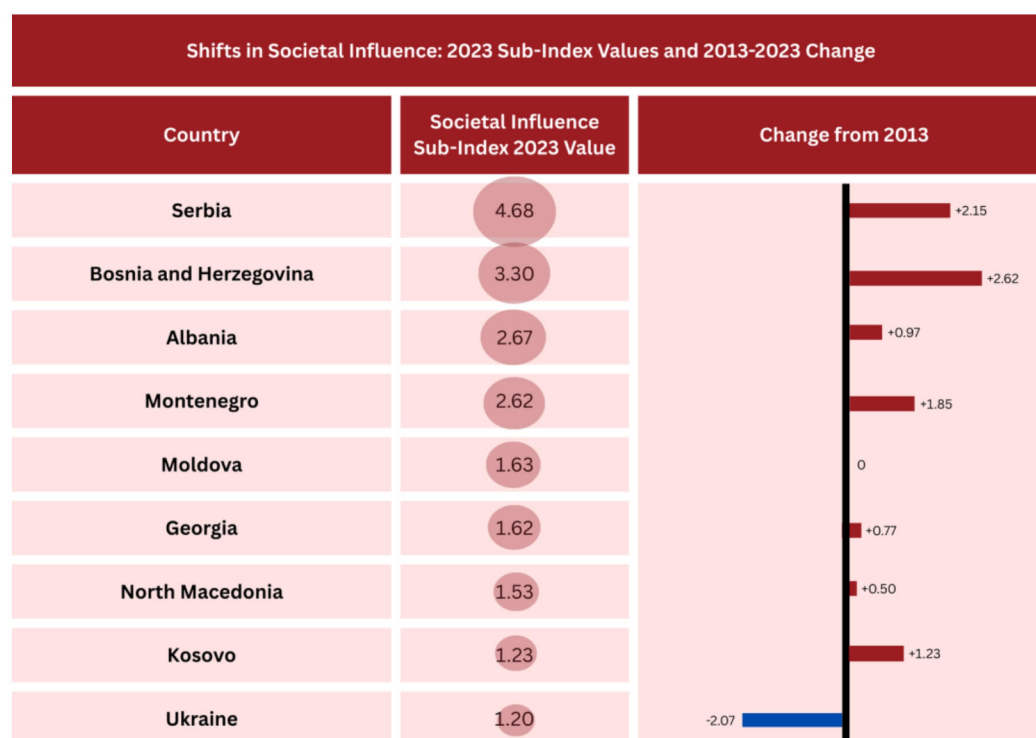


Figure 7: Societal Influence Sub-Index Values in 2023 Compared to 2013



Turkey is successfully enhancing its people-to-people connections and extending its societal reach across the region. The widespread implementation of **visa-free regimes** between Turkey and the Western Balkan countries has dramatically reduced barriers to mobility. This is a foundational element for fostering direct human exchange and cultural immersion, as it drastically lowers the logistical and psychological threshold for visits. This ease of travel has directly fueled a substantial increase in tourism from Turkey to the Western Balkans, leading to a

significant influx of Turkish visitors to countries like Bosnia and Herzegovina (485,889), Kosovo (357,717), Serbia (201,440), Albania (199,634), North Macedonia (195,448), and Montenegro (94,659).⁷⁸ This influx facilitates direct cultural exposure, generates economic benefits, and creates tangible links between the societies. Increased tourism fosters familiarity and positive perceptions, and it is a visible form of soft power that generates economic returns while deepening societal ties. For the host countries, it represents a significant source of tourism revenue and cultural exchange, but also a potential avenue for increased Turkish societal penetration.

While the **Turkish diaspora**⁷⁹ remains relatively small in most of these countries, with the exception of North Macedonia,⁸⁰ there are notable exceptions and emerging trends. The historical Bosnian community in Turkey and a recent, more pronounced increase in Turkish citizens residing in Western Balkan countries for work-related reasons suggest a new dimension of economic interdependence that directly translates into a societal presence. Serbia, Bosnia and Herzegovina and Montenegro have seen a rise in Turkish immigrants,⁸¹ drawn by the countries' facilitative policies for obtaining residency and work permits. There are some indications that Ankara could seek to leverage these communities, transforming them from mere demographic groups into strategic vectors of influence. For example, as part of his speech held in Sarajevo, President Erdogan has explicitly encouraged the Turkish diaspora in Bosnia and Herzegovina and other Western Balkan countries to obtain citizenship and engage in politics to improve bilateral relations in Turkey's interest.⁸² While it remains unclear to what extent these actors can serve as direct political levers for Ankara, they undoubtedly contribute to the expansion of Turkey's societal and cultural presence, creating entrenched interests and new human bridges that serve its broader foreign policy objectives. For host countries, this raises questions about integration, national identity, and potential external political influence through resident communities.

Turkey's educational engagement serves as a cornerstone of its societal influence, strategically designed to cultivate long-term ties and foster a new generation of pro-Turkish elites. This is primarily executed through **the active promotion of Turkish language instruction, the establishment of Turkish-owned higher education institutions, and extensive student exchange programmes**. Ankara has invested significantly in this area through vehicles like the Turkish Cooperation and Coordination Agency (TIKA), which has renovated and built numerous schools across the region, as seen in North Macedonia, and Yunus Emre Institute, which promotes Turkish language and culture, and exist in numerous cities of the two regions (Sarajevo, Belgrade,

⁷⁸ Data on tourist arrivals by country of origin in 2023 were obtained from the official websites of the respective national statistical agencies.

⁷⁹ Although not part of the Turkish diaspora in the strict sense, minority communities of Turkic origin in the Eastern Trio – such as the Muslim Adjarians in Georgia, the Crimean Tatars in Ukraine, and the Gagauz in Moldova – also provide Ankara with symbolic and practical linkages, and should be taken into consideration when discussing Turkey's broader societal influence in the region.

⁸⁰ According to the 2021 census, 70,961 individuals of Turkish ethnicity live in North Macedonia, representing 3.86 % of the country's total population.

⁸¹ Kosovo Online: A Stopover or the End of the Road – How Attractive Is the Western Balkans to Foreign Workers?, 9 July 2024, available at: <https://www.kosovo-online.com/en/news/analysis/stopover-or-end-road-how-attractive-western-balkans-foreign-workers-9-7-2024> (last accessed: 12.07.2025).

⁸² Burak Yalim: Erdoğan's Europe campaign and its effects in Bosnia, 31 May 2018, available at: <https://www.dai-lysabab.com/op-ed/2018/05/31/erdogans-europe-campaign-and-its-effects-in-bosnia.com> (last accessed: 12.07.2025).

Pristina, Tbilisi, Kyiv, Skopje, Podgorica, Tirana).⁸³ Parallel to this, the establishment of private universities, such as the International University of Sarajevo (IUS) and the International Balkan University in North Macedonia,⁸⁴ provides a direct avenue for academic and cultural exchange, offering a Turkish educational model and curriculum. This is complemented by robust student exchange programmes that facilitate the mobility of youth between countries, such as Montenegro, where a substantial number of students have received stipends to study in Turkey.⁸⁵ These initiatives are not merely an act of goodwill but a deliberate effort to create an educated cadre of professionals and leaders who are not only familiar with Turkey but also positively disposed towards its culture, values, and foreign policy objectives. This long-term investment in human capital serves to embed Turkey's influence at the very foundation of society, creating an influential network that will endure for decades.

This strategy, however, has been complicated by the Turkish government's domestic political conflicts, which have been exported into the region and have had a direct impact on the educational sphere. **The crackdown on institutions and schools linked to the Gülen movement**, which Ankara designates as a terrorist organization (FETÖ), has led to the establishment of the Maarif Foundation as a state-backed replacement. In countries like North Macedonia, the Maarif Foundation has systematically taken over or established new schools to supplant Gülen-affiliated institutions.⁸⁶ This places host governments in a difficult position, forcing them to balance a crucial strategic partnership with Ankara against domestic legal frameworks and educational autonomy. This showcases the instrumentalization of education in Turkey's foreign policy and illustrates how internal political struggles can become externalised, creating new tensions within partner countries.

City twinning and local-level partnerships serve as another cornerstone of Turkey's societal influence, providing a grassroots mechanism for bypassing national political frictions and creating resilient ties. This strategy is particularly effective and widespread in the Western Balkans, where numerous municipalities in countries like Bosnia and Herzegovina, North Macedonia, and Montenegro are twinned with Turkish cities. This network of local partnerships fosters direct economic and cultural cooperation, from shared municipal projects to exchanges between local officials and communities. This approach has proven to be especially potent in Kosovo, where there has been an exponential increase in city twinnings since 2020.⁸⁷ This surge is directly linked to the recalibration of Kosovo's foreign policy, amidst the decline of relations with main Western allies, under the second Kurti government and was further cemented by Turkey's diplomatic use of humanitarian aid, such as COVID-19 vaccine donations.⁸⁸ By focusing on direct engagement with local governments, Turkey is able to establish an

⁸³ Marta Szpala: Bromance. Turkey's activity in the Western Balkans, 22 November 2022, available at: <https://www.osw.waw.pl/en/publikacje/osw-commentary/2022-11-22/bromance-turkeys-activity-western-balkans> (last accessed: 12.07.2025).

⁸⁴ Marta Szpala: Bromance. Turkey's activity in the Western Balkans, 2022.

⁸⁵ Songul Ozan: Saradnja Turske i Crne Gore svakodnevno napreduje, 22.12.2019, available at: <https://www.vijesti.me/kolumne/414942/saradnja-turske-i-crne-gore-svakodnevno-napreduje> (last accessed: 12.07.2025).

⁸⁶ Daily Sabah: Turkish Maarif Foundation schools open new campus in Skopje, 20 December 2022, available at: <https://www.dailysabah.com/politics/diplomacy/turkish-maarif-foundation-schools-open-new-campus-in-skopje> (last accessed: 12.07.2025).

⁸⁷ Data on town twinning partnerships were collected from the official websites of individual local self-governments in Kosovo.

⁸⁸ Interpretation provided by a Kosovo-based foreign policy expert who requested anonymity. Interview conducted on 20 February 2025.

influential presence that is less susceptible to the political changes of central governments. For Ankara, this strategy cultivates a durable network of support and goodwill at the most fundamental level of society, while for local communities, it provides a visible channel for development and external partnership.

Penetrating even deeper into the everyday life of the affected countries' citizens, Turkish media outlets and content exert considerable influence, particularly through the **widespread popularity of Turkish TV series ("dizi")**. Research indicates that followers of Turkish TV series tend to have more positive thoughts about Turkey and that these series boost tourism.⁸⁹ This form of popular culture serves as a highly effective, non-coercive soft power tool, reaching broad audiences and subtly shaping perceptions. The inherent cultural proximity stemming from the Ottoman legacy significantly amplifies the effectiveness of Turkish cultural products, particularly TV series, allowing them to penetrate deep into societal consciousness and positively influence perceptions. The historical Ottoman presence created shared cultural elements such as cuisine, architecture, customs, and even some linguistic influences across the Western Balkans. This cultural proximity means that the themes, values, and aesthetics portrayed in Turkish dramas resonate more deeply with audiences in these regions than, for example, Western or East Asian productions. Viewers find elements of their own history and daily life reflected, fostering a sense of familiarity and affinity. This makes Turkish popular culture an exceptionally potent soft power tool, capable of fostering emotional connections and positive associations with Turkey, even in countries where political relations might be complex. It underscores the enduring, subtle power of shared heritage.

Beyond entertainment, **Turkish state-backed media**, such as Anadolu Agency (present in Bosnia and Herzegovina, Serbia, Kosovo, and Albania) and TRT Balkan (launched with offices in Skopje and broadcasting in Albanian), provide news and information, influencing narratives. In Albania, direct Turkish ownership or significant stakes in media companies like ALBtelecom and Channel One demonstrate a deeper level of media penetration, allowing for more direct influence on the information landscape.⁹⁰ Turkey actively seeks to shape the information environment through both direct media presence and strategic partnerships, aiming to control narratives and counter unfavourable portrayals. This is not just about cultural exchange; it is about influencing public discourse. By providing news through its own agencies (Anadolu) or directly owning media (Albania), Turkey can ensure its perspective is heard, counter negative narratives, and promote a favourable image. The "media and communications" agreement in Albania suggests a formalised effort to align media output.⁹¹ This indicates a more assertive approach to information dissemination, moving beyond passive cultural exchange to active narrative shaping. This, however, raises questions about media pluralism and potential foreign influence on domestic public opinion.

Religious diplomacy represents yet another significant lever of power for Turkey, leveraging shared confessional bonds to deepen its societal footprint. This influence is primarily

⁸⁹ Mehmet Huseyin Bilgin/Ender Demir/Davor Labas: The Impact of Turkish TV Series on Turkey's Image: Evidence from Eastern Europe, in: Mehmet Huseyin Bilgin/Hakan Danis (eds.): Entrepreneurship, Business and Economics - Vol. 1. Springer, 2016.

⁹⁰ Savic, Marko. Soft Power in Contemporary International Relations: A Comparative Analysis of Russian and Turkish Soft Power in the Western Balkans. PhD dissertation, University of Montenegro, 2024, pp. 263-309.

⁹¹ Anadolu Agency: Albanian premier: Unforgettable helpful acts by Türkiye cemented its support for Albania, Kosovo, 20 February 2024, available at: <https://www.aa.com.tr/en/europe/albanian-premier-unforgettable-helpful-acts-by-turkiye-cemented-its-support-for-albania-kosovo/3143268> (last accessed: 12.07.2025).

channelled through the Diyanet Foundation, Turkey's state-backed Presidency of Religious Affairs. It actively promotes religious cooperation by financing the restoration of mosques, building new religious centres, and providing training for imams across the region.⁹² For instance, Diyanet financed the construction of the central mosque in Pristina and is deeply involved in the restoration of numerous religious sites and the training of imams in Montenegro and North Macedonia.⁹³ However, this overt use of religious tools has also generated criticism, often linked to accusations of "neo-Ottomanism." In some contexts, Ankara's initiatives are perceived less as an act of solidarity and more as a historical and ideological assertion, which is particularly unpopular with non-Muslim populations and those who harbour historical grievances against the Ottoman past. This dynamic illustrates that while religious ties provide a powerful foundation for Turkey's soft power, they can also be a double-edged sword, reinforcing a narrative of external influence that can be viewed with suspicion and resistance.

Consequently, **public perception of Turkey's influence in the Western Balkans is shaped by a mixture of historical memory, religious affiliation, and contemporary political ties.** As the societal influence sub-index suggests, a stark contrast exists between countries with significant Muslim populations and those with historical grievances. In Albania, for example, a 2022 poll shows that a vast majority, over 82% of respondents, view Turkey as having a positive influence.⁹⁴ In Serbia, perceptions are more mixed: while narratives of Ottoman oppression still inform parts of the public debate, improved bilateral relations and visible cooperation projects have contributed to a steady rise in the share of citizens who see Turkey favourably – from less than 15% in 2010⁹⁵ to 56% in 2024.⁹⁶ The situation in the Eastern Trio, however, presents a more nuanced picture. Here, Turkey's societal influence is less a function of deep-seated historical ties and more a reflection of contemporary geopolitical dynamics. In Ukraine, over half of the population holds a favourable view of Turkey, a sentiment largely driven by Ankara's role as a mediator and military supporter in the face of Russian aggression.⁹⁷ In Georgia, a 2021 public opinion poll revealed a more complex view: 4% of respondents identified Turkey as a main friend, while an equal 4% viewed it as a primary enemy.⁹⁸ This perception of Turkey as an enemy has been fuelled by anti-Turkey propaganda, largely based on speculation regarding the possible expiration of the Treaty of Kars, which raised concerns that Turkey might attempt to occupy the Adjara Region. Such narratives were predominantly disseminated by

⁹² Beyond providing financial support and training assistance to Islamic communities, Turkey has demonstrated a distinctive readiness in Serbia to mediate between rival Islamic factions, thereby positioning itself as a potential unifying force. This approach underscores Ankara's perception of religion not merely as a cultural tie, but as a strategic domain through which it can cultivate influence, strengthen its legitimacy among local Muslim populations, and project itself as an indispensable partner in fostering communal cohesion. For more on this, see: Subotić/Janjić: Serbia at the Crossroad between the West and the East, 2020.

⁹³ Janja Muhasilović: Turkey's Faith-based Diplomacy in the Balkans, in: Rising Powers Quarterly, 3(3), 2018, pp. 63–85.

⁹⁴ Mirsada Hallunaj/Nino Strati: Public perceptions towards European Integration, Influence of External Actors and Government Performance in Albania, May 2023.

⁹⁵ Žarko Petrović/Dušan Reljić: Turkish Interests and Involvement in the Western Balkans: A Score-Card, in: Turkey Insight, 13(3), 2011, p. 170.

⁹⁶ Center for Insights in Survey Research: Western Balkans Regional Poll: February – March 2024, April 2024.

⁹⁷ The Odessa Journal (2024): Survey: the majority of Ukrainians have a positive attitude towards Georgia, 4 March 2024, available at: <https://odessa-journal.com/survey-the-majority-of-ukrainians-have-a-positive-attitude-towards-georgia> (last accessed: 12.07.2025).

⁹⁸ Caucasus Research Resource Centre: Caucasus Barometer 2021 Georgia, 2021, available at: <https://caucasusbarometer.org/en/cb2021ge/downloads/> (last accessed: 12.07.2025).

pro-Russian sources.⁹⁹ At the same time, a significant portion of the population views Turkey as a key partner, with 23% mentioning it as a top three partner for economic cooperation and 17% for political cooperation.¹⁰⁰ This underscores that a state's perception, and by extension its societal influence, is not determined solely by its own actions but is also shaped by competing narratives from other actors, a crucial factor that policymakers on all sides, including those in the EU, must bear in mind.

Looking ahead to the 2025–2035 period, **Turkey's societal influence is poised to remain a stable and predictable factor in the region, rather than undergoing any dramatic shifts.** This is because Ankara's soft power strategy has demonstrated remarkable consistency over the past decade, leveraging a clear set of tools to achieve its objectives. The future of this influence, however, will be increasingly shaped by the democratic and legal trajectory of the candidate countries themselves. As these nations progress on their paths toward EU integration and strengthen their commitment to democratic principles, the rule of law, and secularism, a clear contrast will emerge. Turkey's societal model, which is often perceived as traditionalist, increasingly religiously conservative, and characterised by weaker rule of law and human rights, will find itself in direct ideological competition with the European values being promoted. For policymakers, particularly within the EU, this presents a critical consideration: while Turkey's societal footprint will likely persist with stable or slightly fluctuating influence, its long-term resonance and appeal will be tested by this growing divergence in values. It is a dual challenge where Ankara's sustained engagement may either be seen as a complement to regional stability or as a parallel, and potentially contradictory, model of societal development.

Overall InvigoratEU External Influence Index: General Trends of Chinese Influence

The **InvigoratEU External Influence Index** represents the arithmetic mean of three sub-indices—capturing Turkey's political, economic, and societal influence—and functions as a comprehensive metric (0–10 scale) for assessing the overall trajectory of Turkish leverage across the nine analysed EU candidate countries. Once quantified, the level of influence is categorised into five tiers—from Very Low to Very High—based on the resulting score, offering a comparative reflection of the depth and impact of Turkey's involvement in domestic affairs (see Figure 4). By aggregating data across these three dimensions, the Index provides a holistic lens through which to understand how Turkish influence has evolved over time, highlighting both overarching patterns and country-specific outliers.

⁹⁹ Medium: Pro-Kremlin Actors Fuel Anti-Turkish Sentiments in Georgia, 9 August 2019, available at: <https://medium.com/dfrlab/pro-kremlin-actors-fuel-anti-turkish-sentiment-in-georgia-4ee24aa17ceb> (last accessed: 12.07.2025).

¹⁰⁰ Caucasus Research Resource Centre: Caucasus Barometer 2021 Georgia, 2021.

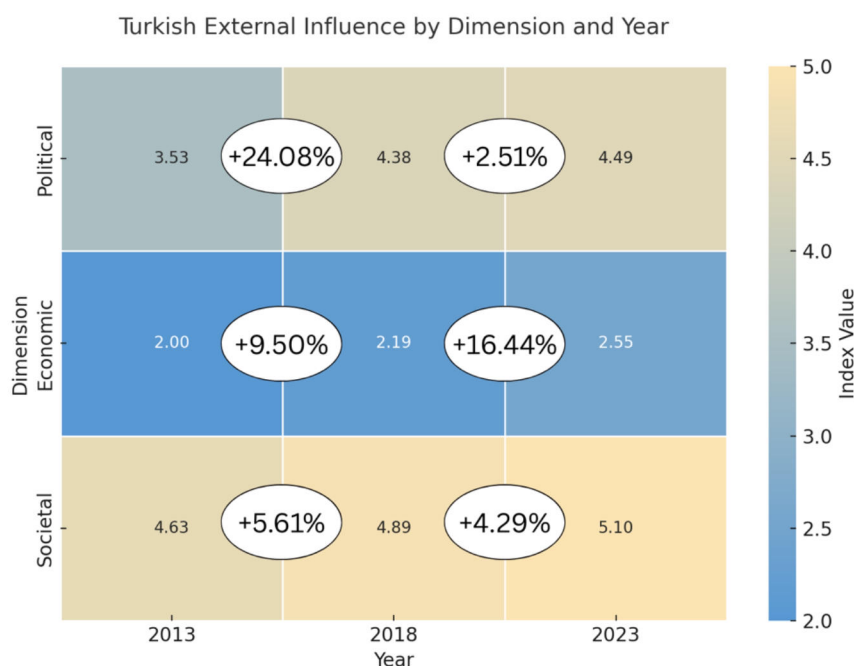
Figure 8: Categorisation of Turkish Influence by InvigoratEU External Influence Index Score

Index Range	Influence Category	Description
0.0 – 1.9	Very Low	Little to no evidence of Turkish political, economic, or media presence.
2.0 – 3.9	Low	Some indicators of Turkish engagement, but limited impact on national affairs.
4.0 – 5.9	Moderate	Noticeable Turkish influence across sectors, but not dominant or structurally embedded.
6.0 – 7.9	High	Strong Turkish presence in key areas; influence is persistent and strategic.
8.0 – 10.0	Very High	Deep and pervasive Turkish involvement shaping policy, economy, and discourse.

Rather than manifesting evenly, Turkish influence across the region has evolved in distinctly different ways across the three dimensions. As illustrated in Figure 9, the aggregated Index values for political, economic, and societal influence over time reflect diverging patterns of engagement and reveal the specific domains through which Turkey has sought to assert its presence.

Figure 9: Aggregated Turkish Influence Index by Dimension and Year (2013–2023)

The heatmap presents the arithmetic averages of country-level index scores across the political, economic, and societal dimensions, providing a consolidated snapshot of regional trends over time.



The observed trends across the three dimensions underscore the differentiated nature of Turkish influence, pointing to how its presence has evolved through distinct modalities of engagement:

- **Political influence** experienced its **sharpest increase between 2013 and 2018** (+24.08%), followed by **relative stabilisation** (+2.51% between 2018 and 2023). This initial surge corresponds to Turkey's intensified high-level diplomatic activity, marked by a notable expansion of personalised presidential diplomacy and formalised cooperation frameworks—such as strategic councils and intergovernmental mechanisms. The more moderate growth in the latter period suggests that Turkey consolidated its political capital where influence had already been established, while encountering greater constraints in environments where diplomatic space had narrowed or competition from other external actors had intensified.
- **Economic influence** followed a **steady upward path**, growing by +9.50% in the first half of the decade and **accelerating** to +16.44% thereafter. This expansion reflects Turkey's deepening role as a trade and investment partner, underpinned by concessional financing, strategic infrastructure involvement, and institutionalised economic agreements. The cumulative effect of these instruments is the entrenchment of Turkey as a reliable—though not dominant—economic actor across multiple sectors.
- **Societal influence** remained the **most stable and consistently high-scoring dimension**, expanding **incrementally** from an already elevated base (+5.61% from 2013 to 2018; +4.29% between 2018 and 2023). Its persistence is driven by long-standing cultural and religious connections, the sustained presence of educational and media outreach, and the resonance of identity-based narratives—particularly in contexts where Turkey enjoys historical or linguistic affinity.

Overall, the evolution of Turkish influence has been marked less by dramatic shifts than by cumulative layering. While political and economic engagement has grown in scope and complexity, it is the societal domain that continues to anchor Ankara's presence—projecting a sense of familiarity and continuity that reinforces its strategic ambitions in less overt ways.

Figure 10: Shifts in Turkey's *InvigoratEU* External Influence Index Across the Region (2013–2023)

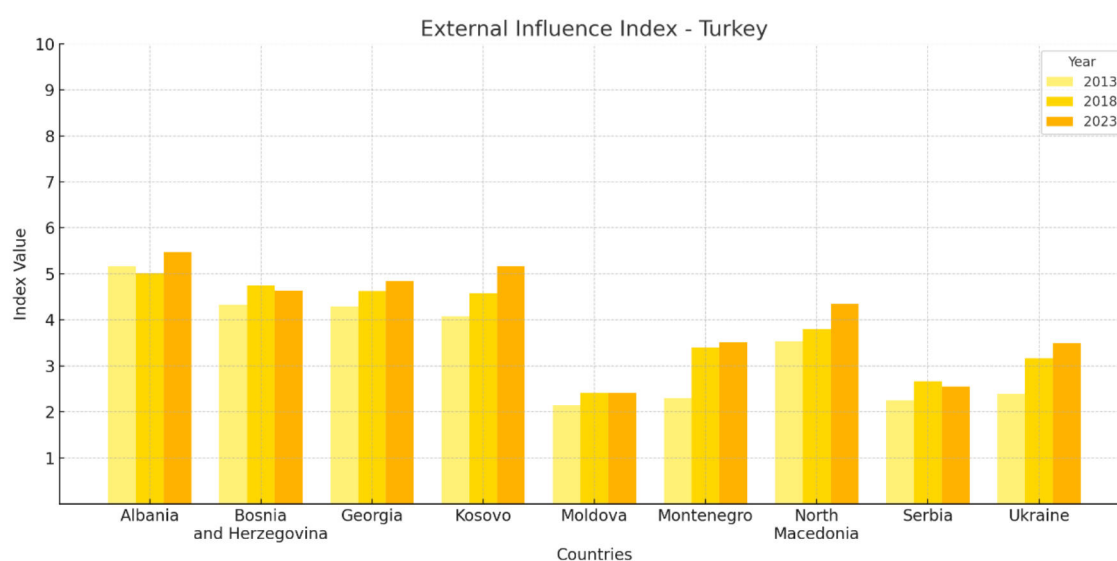
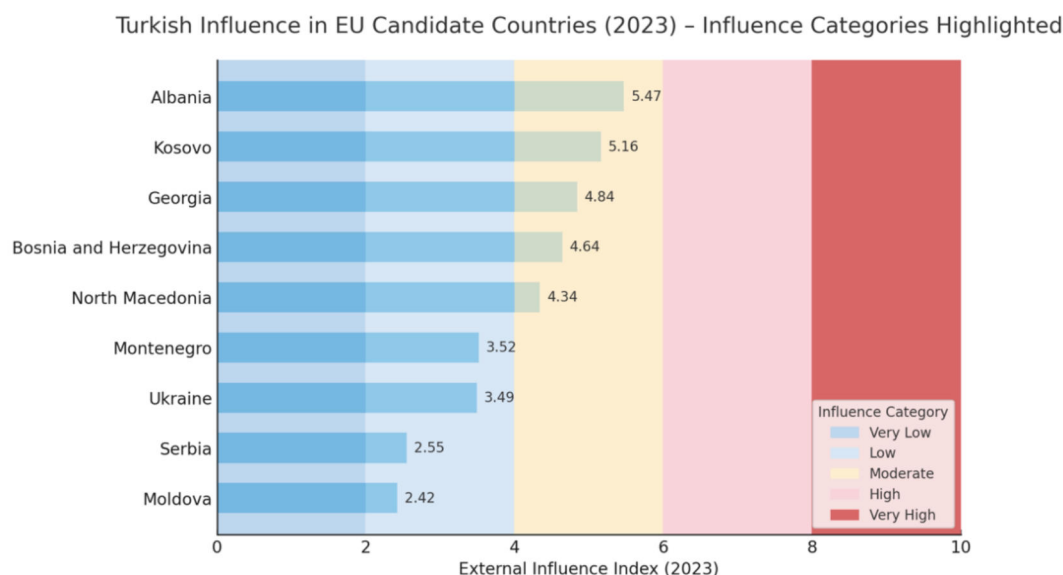


Figure 11: Country-Level 2023 Scores of Turkish Influence in EU Candidates, Colour-Coded by Influence Intensity



Beyond the sectoral trajectories discussed above, national-level patterns provide a more granular understanding of how Turkish influence has been absorbed, accommodated, or resisted across the region. Figures 10 and 11 capture both the evolution of country-specific scores over the 2013–2023 period and their relative positions in the most recent reference year. The influence categories previously introduced (ranging from Very Low to Very High) serve not only as a metric of Turkish presence, but also as a qualitative indicator of how deeply entrenched or limited Ankara’s leverage is within each national context.

- **Albania** maintains one of the most stable and elevated levels of Turkish influence throughout the decade. While minor fluctuations are observed (from 5.16 to 5.47), the overall trend signals continued strategic cooperation across sectors, especially in infrastructure, media, and education. It remains firmly within the *moderate to high influence* bracket.
- **Kosovo** emerges as the most prominent case of Turkish influence growth, with a sharp rise from 4.07 in 2013 to 5.16 in 2023. This upward trajectory reflects intensified high-level political alignment, proactive societal engagement—including cultural twinning and religious diplomacy—and a growing presence of Turkish capital and media influence. Kosovo now falls into *the upper bound of the moderate influence* category, nearing a high score threshold.
- **Georgia** displays a modest but steady rise in Turkish influence (4.29 to 4.84), positioning it in *the upper segment of moderate influence*. Ankara’s influence here reflects a long-term strategic partnership, bolstered by strong economic interdependence and complementary geopolitical outlooks. As Georgia aspires to NATO membership, Turkey serves as both a facilitator and a counterweight to Russian influence in the South Caucasus—making its leverage here unusually stable and multidimensional.¹⁰¹

¹⁰¹ The Index data covers developments until 2023. Subsequent political turmoil in Georgia (2024–25) primarily affected the country’s EU trajectory rather than its relations with Turkey, which have remained anchored in economic interdependence and Black Sea security cooperation.

- **Bosnia and Herzegovina** records a slight increase over time (from 4.32 to 4.64), sustaining a *moderate influence level*. This enduring presence stems from strong cultural affinity, historical bonds, and Ankara's deep-rooted societal outreach, although the index plateau suggests a certain saturation of influence channels, particularly in relation to the growing competition with other extra-regional actors such as Russia and China.
- **North Macedonia** registers consistent growth across all three dimensions, with its index rising from 3.54 in 2013 to 4.34 in 2023. This reflects long-standing institutional openness to Turkey's presence, including cultural, educational, and economic initiatives—making it one of the most receptive environments in the Western Balkans.
- **Montenegro** shows significant growth, from 2.30 in 2013 to 3.52 in 2023. This increase reflects rising engagement, especially since the country's NATO accession—through enhanced political and military cooperation. Economic visibility has grown via investments in infrastructure projects, including religious and broader public works. Still, Turkey's ability to deepen its influence is constrained by Montenegro's strong orientation toward EU integration and the limited institutional bandwidth for developing alternative strategic partnerships.
- **Ukraine** also shows gradual growth (from 2.39 in 2013 to 3.49 in 2023), largely driven by intensified political and defence cooperation following the 2014 annexation of Crimea and, more recently, Turkey's support during the ongoing war with Russia. Bilateral ties have deepened around shared concerns over regional security, particularly in the Black Sea basin, where Ankara and Kyiv increasingly coordinate efforts to counterbalance Russian assertiveness. Nonetheless, Turkey's economic and societal footprint remains limited, keeping overall influence *within the low category*.
- **Serbia**, despite a modest increase (from 2.25 to 2.55), remains among the countries least affected by Turkish influence. Deep-rooted historical grievances—rooted in the collective memory of Ottoman rule—coupled with strong opposition to Ankara's support for Kosovo, have significantly curtailed Turkey's appeal across political and societal domains. Moreover, Turkey is not among the informal pillars of Serbia's foreign policy orientation, which continues to be anchored in Washington, Brussels, Beijing, and Moscow. As a result, Turkish influence remains *categorised as low*.
- **Moldova**, which exhibits minimal change over the decade (from 2.15 to 2.42, with stagnation after 2018), illustrates the peripheral nature of Turkish influence in the Eastern Trio. The shallow footprint reflects not structural constraints per se, but rather a mutual lack of prioritisation: Moldova lies outside Ankara's strategic orbit, while Turkish initiatives have failed to translate into sustained societal or institutional presence. The country remains *at the lower end of the low influence category*.

Taken together, these country-specific trajectories suggest that **Turkey's influence is shaped less by coercive penetration and more by a blend of historical affinity, elite-level diplomacy, and selective economic engagement**. Higher index scores tend to correlate with strong societal resonance and sustained political ties—often rooted in shared identity markers or symbolic solidarity. Conversely, a firm commitment to EU accession, a lack of political interest or frameworks to embed Turkey's initiatives and competing geopolitical loyalties tend to constrain Turkish outreach. The data also reveals that moments of geopolitical fluidity—such as armed conflict (e.g., the war in Ukraine), EU disengagement from enlargement (as observed across parts of the Western Balkans), or regional security realignments (e.g., NATO expansion in the Western Balkans and Black Sea cooperation)—can open windows of opportunity for Ankara. Yet long-term consolidation remains uneven and highly context-dependent.

5 Key Findings

Based on the InvigoratEU External Influence Index (2013–2023), this study reveals that Turkey’s growing presence across the Western Balkans and the Eastern Trio is shaped less by coercive ambition than by strategic flexibility and adaptive opportunity. Its influence has advanced where local elites are receptive, institutional alternatives are weak, and historical or cultural familiarity offers fertile ground. At the same time, Turkey’s reach is neither uniform nor uncontested. **Seven key findings capture the logic, extent, and implications of Turkish engagement in the EU’s neighbourhood:**

1. **Turkey’s influence has advanced incrementally yet effectively.**

Over the past decade, Ankara has succeeded in consolidating its presence across both the Western Balkans and the Eastern Trio not through abrupt breakthroughs, but through a steady accumulation of ties and initiatives. Rather than relying on coercive tools, Turkey has advanced by embedding itself step by step – through visible cultural outreach, carefully targeted investments, and consistent high-level political engagement. This incrementalism has proven to be an asset: it avoids provoking strong resistance, allows Ankara to adapt flexibly to changing local contexts, and produces a cumulative effect that becomes increasingly difficult to reverse. The outcome is that, despite structural limits and uneven depth, Turkey can be seen as one of the few external actors that has managed to expand its footprint continuously over the past decade.

2. **Pragmatic complementarity defines Turkey’s engagement.**

Unlike other external actors, Turkey has not sought to position itself in direct opposition to the EU. On the contrary, it often endorses Euro-Atlantic integration and avoids overt interference in domestic political processes—except in matters linked to its internal security agenda, most notably the campaign against the Gülen movement and Kurdish activists. Rather than competing with Brussels ideologically or institutionally, Ankara has adopted a transactional, relationship-based model of influence. Through personalised diplomacy, strategic visibility, and sector-specific deals—especially in infrastructure, defence, and culture—Turkey positions itself as a flexible and responsive partner. This non-confrontational posture allows it to maintain ties across political divides, including in countries with strong pro-EU orientations. It also provides Ankara with a unique space: to engage without being seen as a spoiler, and to entrench its influence without demanding normative convergence.

3. **EU disengagement enables Turkish leverage.**

Turkey’s gains are most visible where the EU has faltered—either through delayed infrastructure delivery, unmet political conditionality, or fatigue in the enlargement process. In countries like Kosovo and North Macedonia, Turkey has filled strategic and symbolic vacuums by offering swift concessional loans through institutions such as Turk Ex-imbank, supporting high-profile infrastructure and educational projects via TIKa, and investing in direct political ties at the summit level. Where the EU fails to project a credible horizon or appears absorbed in internal challenges, Ankara’s responsiveness is interpreted as commitment. Conversely, in Moldova—where the EU has recently stepped up its engagement through accession negotiations and financial support—Turkey’s role remains peripheral and largely reactive. This pattern suggests that Turkish

influence thrives not because it is imposed, but because it is allowed to expand into unclaimed space.

4. Influence is expanding—but selectively.

Between 2013 and 2023, Turkey increased its overall presence across all nine countries analysed in the InvigoratEU Index. Yet the intensity and depth of this expansion vary significantly. The most pronounced growth is observed in Kosovo, North Macedonia, and Albania, where shared religious heritage, favourable elite relations, and relatively open institutional frameworks have created conducive environments. By contrast, Moldova has seen little movement since 2018, while Serbia remains structurally ambivalent—balancing limited Turkish engagement with its complex alignment with other actors. These findings confirm that Ankara does not pursue a uniform model of influence but instead focuses its resources where it expects the greatest return—geopolitically, symbolically, or economically. Turkey's leverage is therefore best understood as opportunistic rather than expansionist: it seeks depth where receptivity exists but avoids contesting ground where resistance is entrenched.

5. Societal linkages anchor Turkey's presence.

Of the three dimensions tracked by the Index, societal influence consistently scores highest and proves most stable. Turkey's ability to foster cultural familiarity and emotional affinity—particularly in Muslim-majority areas of the Western Balkans—has allowed it to cultivate a form of soft power that is difficult to replicate. Ottoman heritage, shared religious symbols, and widespread consumption of Turkish television series have created enduring channels of societal resonance. These are further reinforced through visa liberalisation, student exchange schemes, diaspora linkages, and mosque restoration projects funded by institutions like Diyanet. Public approval rates reflect this embeddedness: in Albania, over 80% of the population views Turkey's role favourably. While political and economic partnerships might be vulnerable to leadership change or fiscal volatility, societal channels have proven remarkably resistant to short-term fluctuations. In this sense, Turkey's cultural diplomacy serves not merely as a supplement to political power, but as a structural foundation for long-term influence.

6. Political and economic gains face ceilings.

Despite visible advances in diplomacy and investment, Turkey's political and economic influence encounters hard limits. In politically consolidated or EU-anchored environments, Brussels remains the more dominant partner, particularly in areas tied to funding, regulatory alignment, or institutional reform. Even in cases where Ankara has positioned itself as a key infrastructure financier, its ability to sustain this role is increasingly in question due to high inflation, economic instability, and growing concerns over the reliability of its public finances. Furthermore, regional disruptions such as the war in Ukraine have forced Turkey to reallocate diplomatic and security resources, reducing bandwidth for soft engagement elsewhere. These ceilings do not negate Ankara's gains—but they highlight the importance of context: Turkey can embed itself where there is space but cannot displace entrenched frameworks or compete on scale with the EU.

7. Regional strategies diverge sharply.

Turkey's foreign policy is highly adaptive and differentiated across sub-regions. In the Western Balkans, Ankara relies heavily on civilisational narratives, cultural diplomacy, and religious outreach to consolidate its presence. Here, Turkey presents itself as a

familiar, even fraternal, actor—drawing legitimacy from shared Islamic heritage, Ottoman memory, and people-to-people connectivity. In the Eastern Trio, however, this model is less effective due to weaker historical ties and different strategic stakes. Instead, Ankara projects itself as a geopolitical balancer, supplying military equipment (e.g., Bayraktar drones to Ukraine), enhancing naval coordination in the Black Sea, and supporting security cooperation as a NATO actor. This divergence underscores Turkey's strategic flexibility, but also its limitations: societal resonance cannot be easily exported beyond its civilisational core, and military engagement has yet to produce deeper societal or economic ties in the Eastern Trio.

8. Sustainability hinges on internal and external factors.

The trajectory of Turkish influence remains uncertain. Domestically, Ankara faces growing constraints: economic fragility, democratic erosion, and uncertain relations with NATO allies all threaten its credibility as a long-term partner. Externally, its role is increasingly challenged by competing actors. China and Gulf states offer parallel investment models, often with deeper pockets, while renewed EU attention in the neighbourhood could reclaim ground ceded over the past decade. If Turkey cannot deliver on its commitments, or if its assertiveness begins to clash with local priorities, even well-established partnerships may erode. Conversely, should Ankara stabilise economically and continue to offer nimble, non-intrusive cooperation, its appeal may persist—particularly in settings where the EU fails to re-establish its own “strategic depth”. In either case, Turkish influence will remain a dynamic and contested element of the EU's immediate environment, requiring careful monitoring and calibrated engagement.

6 Recommendations

As Turkey consolidates its role as a flexible yet assertive actor in the EU's neighbourhood, the Union must adopt a more pro-active strategic posture that leaves less room for Ankara to expand by default. While Turkish influence is not inherently antagonistic to European interests – indeed, Ankara often endorses Euro-Atlantic integration and contributes to regional security efforts – the challenges emerge when this influence takes on less constructive forms. Turkey's domestic political agenda is frequently externalised, most visibly through pressure on local authorities to act against Gülen-linked actors or Kurdish activists, raising concerns of political interference. Likewise, Turkish investment, while valuable in filling infrastructure and financing gaps, has occasionally been associated with non-transparent practices, risks of corruption, and limited alignment with EU regulatory standards. The greater danger for the EU lies in Turkey being perceived by candidate countries as a *viable alternative model*: formally a candidate state, yet one that diverges sharply from core democratic and rule-of-law benchmarks. The following recommendations therefore aim not at constraining Turkey's presence per se, but at strengthening EU's own credibility, regulatory leverage, and normative appeal – minimising the potential downsides of Turkish engagement while maximising the scope for constructive cooperation.

1. Reinvest in credibility through visible and timely delivery.

Turkey has excelled in occupying strategic and symbolic vacuums left by delayed EU infrastructure projects or stalling political processes. To ensure it remains the primary partner of choice, the EU should ensure the timely implementation of its pledged financial support, particularly under the IPA III and Western Balkans Growth Plan. Public awareness of EU-funded projects should be strengthened through improved outreach and communication strategies, working with independent media and civil society actors to highlight palpable results. Flagship projects, such as transport corridors and energy interconnectors, should be fast-tracked and framed as part of a larger geopolitical investment in the two region's European future. In settings like Kosovo or North Macedonia, where Ankara's responsiveness is particularly well received, the EU must demonstrate that it can be not only a norm-setter, but also a provider of tangible outcomes.

2. Expand EU presence at the local level.

Turkey's societal influence often bypasses national elites by engaging local communities directly through city twinnings, mosque restorations, and cultural initiatives. The EU should adopt a similar approach by scaling up its local footprint. Delegations and EU offices should deepen ties with local authorities, particularly in regions with high Turkish visibility. Dedicated funding lines should support joint EU-local government initiatives focused on youth engagement, environmental protection, and historical heritage preservation. This decentralised engagement model will make the EU more relatable, foster bottom-up ownership of reforms, and ensure that Europe, rather than external actors, is seen as the most present and responsive partner in local communities.

3. Institutionalise working-level coordination with Turkey on the Western Balkan and Eastern Trio.

Rather than treating Turkish influence as a permanent source of friction, the EU should establish more systematic exchanges with Ankara to address shared concerns in the Western Balkans and Eastern Trio region. These can include regular working-level dialogues on regional stability, joint participation in resilience forums, and issue-specific coordination on matters such as infrastructure security or migration. By recognising Turkey as a relevant, though not always aligned, stakeholder, the EU can increase predictability and reduce the likelihood of conflictual overlap.

4. Safeguard EU standards and the principle of conditionality even when candidate countries face political pressure from Turkey.

In cases where Turkey exerts political pressure on partner states—particularly through extradition demands, potential legislative interference, or media control—the EU should continue to apply principled conditionality. Pre-accession instruments and macro-financial assistance should be tied to the recipient country's adherence to EU standards on the rule of law, judicial independence, and non-discrimination. Quiet diplomacy should also be deployed to support host governments in resisting undue influence without compromising bilateral relations. This is

especially pertinent in contexts like Moldova and Serbia, where Ankara's pressure over the Gülen network has at times conflicted with human rights commitments.

5. Monitor and counter embedded economic dependencies

As the Turkish capital becomes embedded in strategic sectors—such as construction, banking, and energy—the risk of economic dependency increases. The EU should support partner countries in developing investment screening mechanisms, particularly in sectors of systemic importance. Advisory missions under the European Commission's structural reform support programme can assist in drafting legislation and creating monitoring bodies. In parallel, enhanced cooperation with the European Investment Bank (EIB) and the European Bank for Reconstruction and Development (EBRD) can help dilute monopolistic dependencies by offering competitive financing for critical infrastructure.

6. Reclaim soft power through people-to-people tools.

Turkey's societal reach has been amplified through soft power instruments such as state-funded TV series, religious diplomacy, and student mobility. The EU should step up its own toolkit by expanding Erasmus+, Creative Europe, and Jean Monnet modules across the Western Balkans and Eastern Trio. A special emphasis should be placed on media literacy, pluralism, and EU-branded educational opportunities. Investment in regional media outlets and university consortia can build lasting platforms for European narratives. Promoting secular, inclusive values in public discourse can provide a compelling counterweight to more conservative or illiberal models.

7. Address ideological divergence with clarity.

As candidate countries move closer to EU membership, the contrast between EU norms and Turkey's societal model will sharpen. The EU should not shy away from articulating this divergence. Through public diplomacy and strategic communication, it should affirm the values of secularism, judicial independence, gender equality, and media freedom as non-negotiable pillars of the European project. This messaging should be tailored to resonate with youth and civil society actors, particularly in hybrid regimes where competing narratives abound. Clarifying what the EU stands for—not just what it opposes—will be crucial in preserving its normative edge.

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Annex I *InvigoratEU External Influence Index: Detailed Breakdown*

Table 1: InvigoratEU External Influence Index

Element of analysis	Indicator	Sources of evidence	Indicator scale (0-3)	Weighting the indicator
POLITICAL-SECURITY DIMENSION				
Bilateral and multilateral platforms (overall 25%)				
Level of bilateral partnership	Depth and breadth of formal cooperation	Number and importance of signed agreements, presence of joint initiatives	0 – No close partnership 1 – Partnership in development 2 – Limited partnership, e.g., agreements in particular areas 3 – Deep, long-term strategic partnerships across multiple sectors	15%
Participation in Russia/China/Turkey-led multilateral political initiatives	Extent of participation in multilateral initiatives	Membership or observer status, participation in key summits, decision-making roles	0 – No participation 1 – Observer status or ad hoc participation 2 – Membership but limited participation 3 – Membership and significant contributions	5%
Bilateral high-level visits	Frequency and level of state visits	Number and level of visits (head of states and governments, ministers)	0 – No visits recorded 1 – Occasional high official and ministries visits 2 – Regular high official visits and ministries visits 3 – Frequent high official and ministerial visits and by head of states and/or governments	5%
Internal politics (overall 25%)				

Relations with political parties	Political influence through party channels	Support, funding, or ideological alignment with external actors of key political parties	0 – No significant relations among parliamentary parties (PP) 1 – Ideological alignment and cooperation with opposition parties 2 – Ideological alignment and cooperation with junior parties in government coalition 3 – Ideological alignment and cooperation with major parties in government coalition	5%
Parliamentarian cooperation	Engagement in inter-parliamentary networks	Joint parliamentary sessions, parliamentary delegation visits, formal cooperation platforms	0 – No cooperation established 1 – Limited cooperation through delegations or informal networks 2 – Formalised cooperation 3 – Institutionalised cooperation with regular exchanges	5%
Election interference	Evidence of meddling in the election process	Instances of cyberattacks, disinformation or foreign funding	0 – No interference recorded 1 – Minor interference in information channels (e.g., disinformation campaigns) 2 – Isolated, uncoordinated interference attempts 3 – Coordinated and significant interference with election outcomes at risk	10%
Legislative interference	Influence on domestic law-making process	Lobbying, pressure to pass or reject laws, foreign-sponsored policies	0 – No interference recorded 1 – Minimal lobbying or indirect influence 2 – Occasional influence on particular laws 3 – Direct involvement in shaping key national legislation	5%
Military sphere (overall 25%)				

Military cooperation	Depth and frequency of military collaboration	Joint exercises	0 – No cooperation 1 – Military drills in discussions 2 – Bilateral military drills 3 – Bilateral and multilateral military drills	5%
Military presence	Degree of permanent/temporary foreign military presence	Troops, foreign bases, joint defence installations	0 – No active presence 1 – Military presence discussed but not implemented 2 – Short-term or semi-permanent deployments or symbolic presence 3 – Permanent bases or significant foreign military infrastructure	15%
Arms trade	Volume and strategic value of equipment trades	Volume of arms traded, defence contracts	0 – No notable cooperation 1 – Discussions on arms trade 2 – Notable arms trade 3 – Significant and sustained arms trade with strategic value	5%
Foreign policy (overall 25%)				
CFSP alignment in relation to Russia/China/Turkey	Degree of alignment with CFSP on Russia/China/Turkey issues	Alignment with High Representative's declarations	0 – Full alignment with CFSP 1 – >0; <20% of non-alignment 2 – >20%; <60% of non-alignment 3 – >60% of non-alignment	10%

<p>Involvement in the pursuit of key national interests (e.g. EU/NATO membership, territorial integrity, etc.) – contestation or support</p>	<p>Degree of contestation of key national policies or the degree of support for key national policies¹⁰²</p>	<p>Public critics, hostile diplomatic actions, coercive economic measures, support for secessionist movements, etc. (in case of contestation)</p> <p>or</p> <p>Public endorsements, diplomatic assistance in multilateral forums, non-recognition of seceding entities etc. (in case of support)</p>	<p>0 – No involvement or neutral stance 1 – Low-level involvement through rhetoric 2 – Moderate involvement, characterised by consistent contestation or support 3 – Significant involvement, where external actors actively and strategically support or contest key national interests</p>	<p>15%</p>
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¹⁰² This indicator evaluates the extent of interest that foreign actors have in the key national interests of individual states. A foreign actor's influence is likely to be less intensive if it shows less interest in a state's key national interests. However, when a foreign actor actively opposes a state's national interests, its influence tends to increase due to deeper engagement. Conversely, there are instances where foreign actors actively support specific key national interests, thereby gaining leverage and fostering closer ties with those states, which also leads to significant influence. For example, Russia's influence in Moldova is considerable as it supports

ECONOMIC DIMENSION				
Trade and investment relations (overall 67%)				
The official level of economic/trade partnership	Strength of formal economic/trade agreements	Signed trade agreements, economic treaties, customs unions, trade promotion frameworks	0 – No formal economic partnership or negotiations ongoing 1 – Trade agreements in particular sectors 2 – Free trade agreements 3 – Deep and comprehensive free trade agreements (second generation free trade agreement)	5%
Foreign Direct Investments	FDI inflows	Annual FDI inflows as a percentage of total FDI inflows	0 – No FDI >1% of total FDI 1 – FDI 1-5% of total FDI 2 – FDI 5-20% of total FDI 3 – FDI >20% of total FDI	7%
	FDI Stock	FDI stock as a percentage of total FDI stock	0 – No FDI >1% of total FDI 1 – FDI 1-5% of total FDI 2 – FDI 5-20% of total FDI 3 – FDI >20% of total FDI	15%
Trade Intensity (goods and services trade)	Exports	Share of exported goods and services as a percentage of total exports	0 – Trade <5% of total 1 – Trade 5-10% of total 2 – Trade 10-20% of total 3 – Trade >20% of total	25%
	Imports	Share of imported goods and services as a percentage of total imports	0 – Trade <5% of total 1 – Trade 5-10% of total 2 – Trade 10-20% of total 3 – Trade >20% of total	15%
Strategic economic dependence (overall 33%)				

secessionist movements, thereby opposing the country's aspirations for territorial integrity and sovereignty. In contrast, in Serbia, Russia's influence remains strong due to its substantial backing on Serbia's position on the Kosovo issue, making it an appealing partner.

Strategic assets ownership and presence of foreign firms	Ownership of key sectors/assets by foreign actors, as well as presence of foreign-owned or partnered firms	Control of strategic sectors (e.g., energy, telecom, transport, banking) by foreign firms/governments	0 – No foreign ownership or minimal ownership of minor assets 1 – Relative majority ownership in one sector 2 – Relative majority ownership in several sectors 3 – Absolute majority ownership in at least one sector	11%
Energy dependence	Share of energy imports from foreign actors	Percentage of total energy imports coming from one external actor	0 – Energy imports <5% 1 – 5–20% energy imported 2 – 20–35% of energy imported 3 – >35% of energy imported from a single actor	15%
Official foreign debt	Foreign debt to external actors	Foreign debt to a specific country as a percentage of total debt	0 – No foreign debt 1 – Foreign debt <5% of total 2 – Foreign debt <15% of total 3 – Foreign debt >15% total	7%
SOCIETAL DIMENSION				
Mobility and connectivity (overall 27%)				
Diaspora	Size and influence of the diaspora community	Size of the diaspora population and their level of influence in local politics, economy and culture	0 – No significant diaspora 1 – Small diaspora with minimal influence 2 – Moderate diaspora with some influence 3 – Large diaspora with significant influence	6%

Visa requirement	Ease of travel between countries	Visa requirements for citizens, presence of visa-free agreements or relaxed visa policies	0 – No visa-free access 1 – Visa required with some facilitation 2 – Visa-free access for a shorter stay (up to 30 days) 3 – Visa-free access for a longer stay (more than 30 days)	3%
Tourism	Volume and impact of tourism coming from China, Turkey or Russia	Number of tourists from the external actor and their economic impact	0 – Negligible tourism interactions 1 – Low tourism interaction (1-5% of total tourism) 2 – Moderate tourism interaction (5-10% of total tourism) 3 – High volume of tourism (>10% of total tourism)	3%
Education/student exchanges	Scale and impact on educational exchanges	Number of exchange programmes, students participating and institutional partnerships as share of total	0 – No notable exchanges 1 – Minimal exchanges or programs 2 – Moderate exchanges with some impact 3 – Extensive exchanges with significant impact	10%

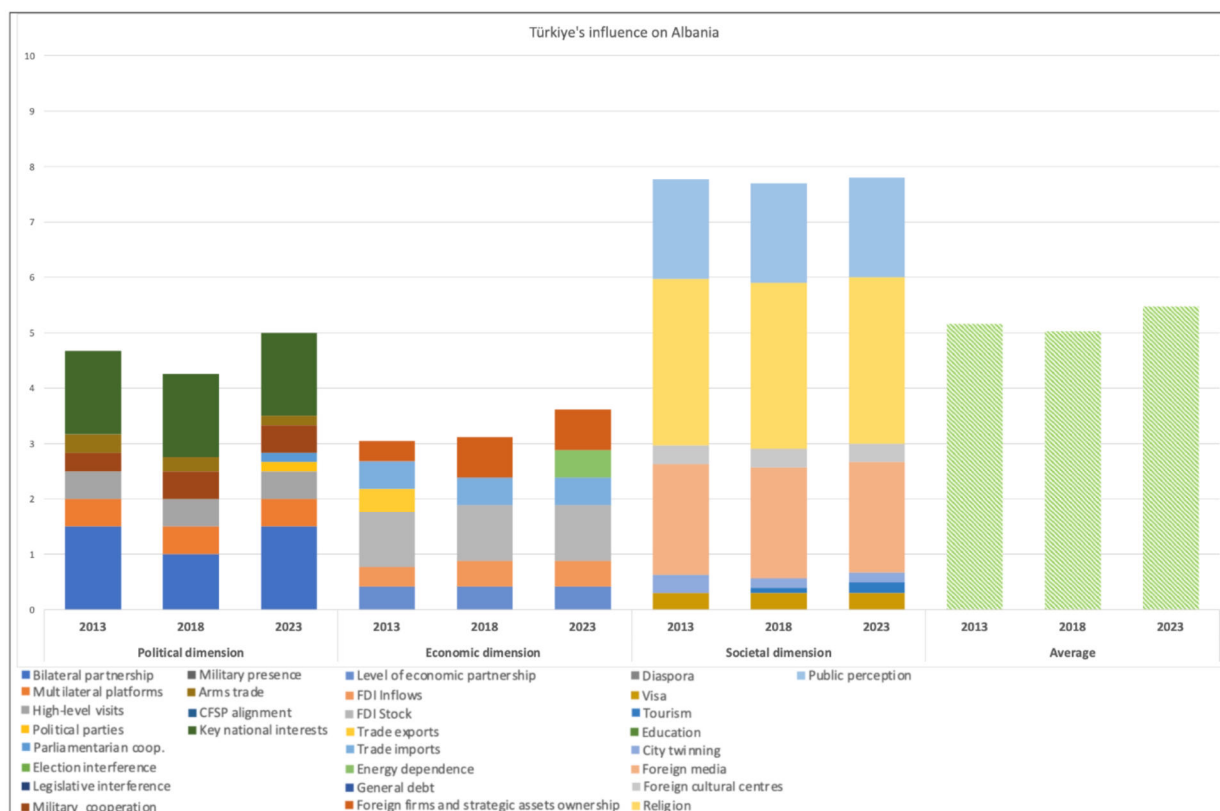
Local/provincial government partnership, city twinning	Number and effectiveness of local/provincial partnerships	Number of twinning agreements and their effectiveness	0 – No partnerships or twinning 1 – Few, ineffective partnerships 2 – Moderate number with some effectiveness 3 – Significant partnerships with proven effectiveness	5%
Cultural and informational sphere (overall 55%)				
Foreign media presence and influence	Extent and nature of foreign media presence	Number of foreign media outlets, their reach, and influence on public opinion	0 – No notable foreign media presence 1 – Minimal presence with limited reach 2 – Moderate presence with some influence 3 – Extensive presence with a noticeable influence on shaping public opinion	20%
The presence of foreign cultural centres	Impact of foreign cultural institutions	Number of cultural centres and their role in promoting foreign culture and language	0 – No foreign cultural centres 1 – Existing but with limited impact 2 – Existing with moderate impact 3 – Existing with substantial impact	5%

Religious bonds and cooperation	Level of religious ties and co-operation	Depth of religious collaborations and partnerships	0 – No religious ties 1 – Different religion but some ties with local minorities 2 – Majority religion, moderate church relations 3 – Majority religion, well-developed church relations	30%
Public perceptions (overall 18%)				
Perception/Public Opinion (on cooperation benefits, on donation intensity, on global influence, on leader popularity, donor perception)	Public opinion on selected aspects	Opinion on cooperation benefits, donation intensity, global influence, leader popularity, and donor perception	0 – Mostly negative opinion 1 – Mostly neutral or mixed opinions 2 – A generally positive opinion with some criticism 3 – Mostly positive opinion with broad support	18%

Annex II *InvigoratEU External Influence Index* per Candidate Country

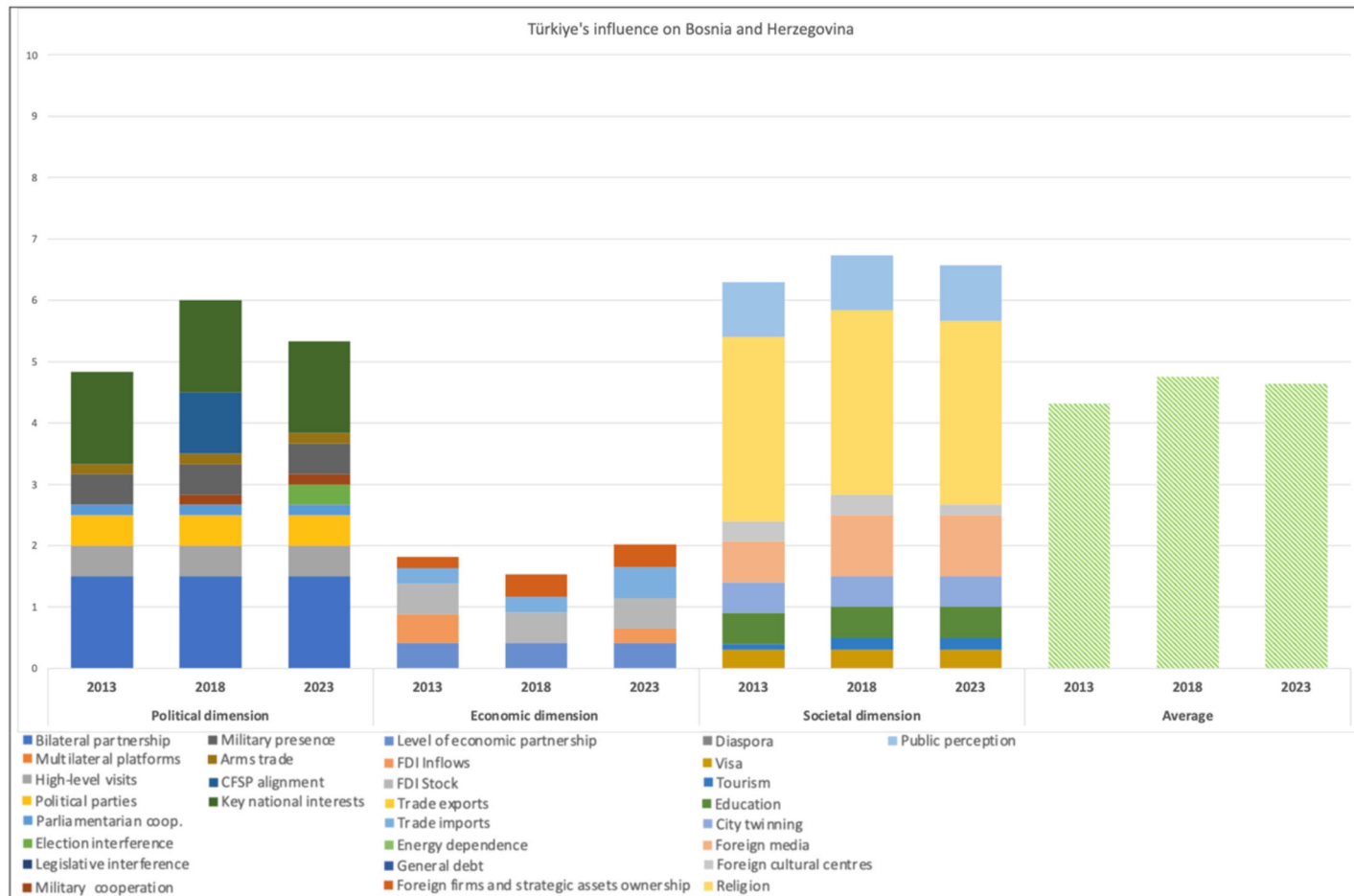
Annex II.1 Albania

Figure 12: Turkey's Influence in Albania (2013–2023)



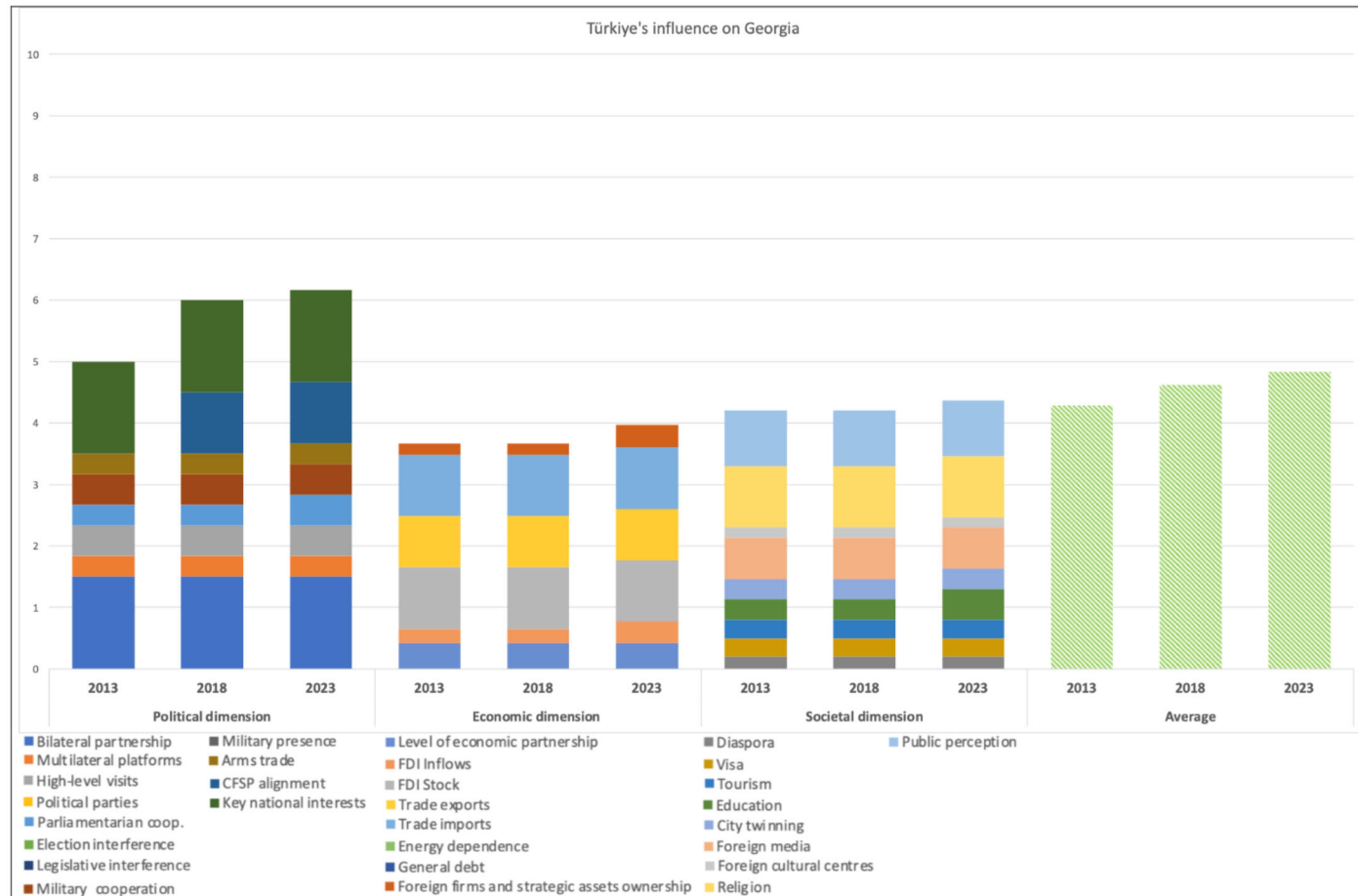
Annex II.2 Bosnia and Herzegovina

Figure 13: Turkey's Influence in Bosnia and Herzegovina (2013–2023)



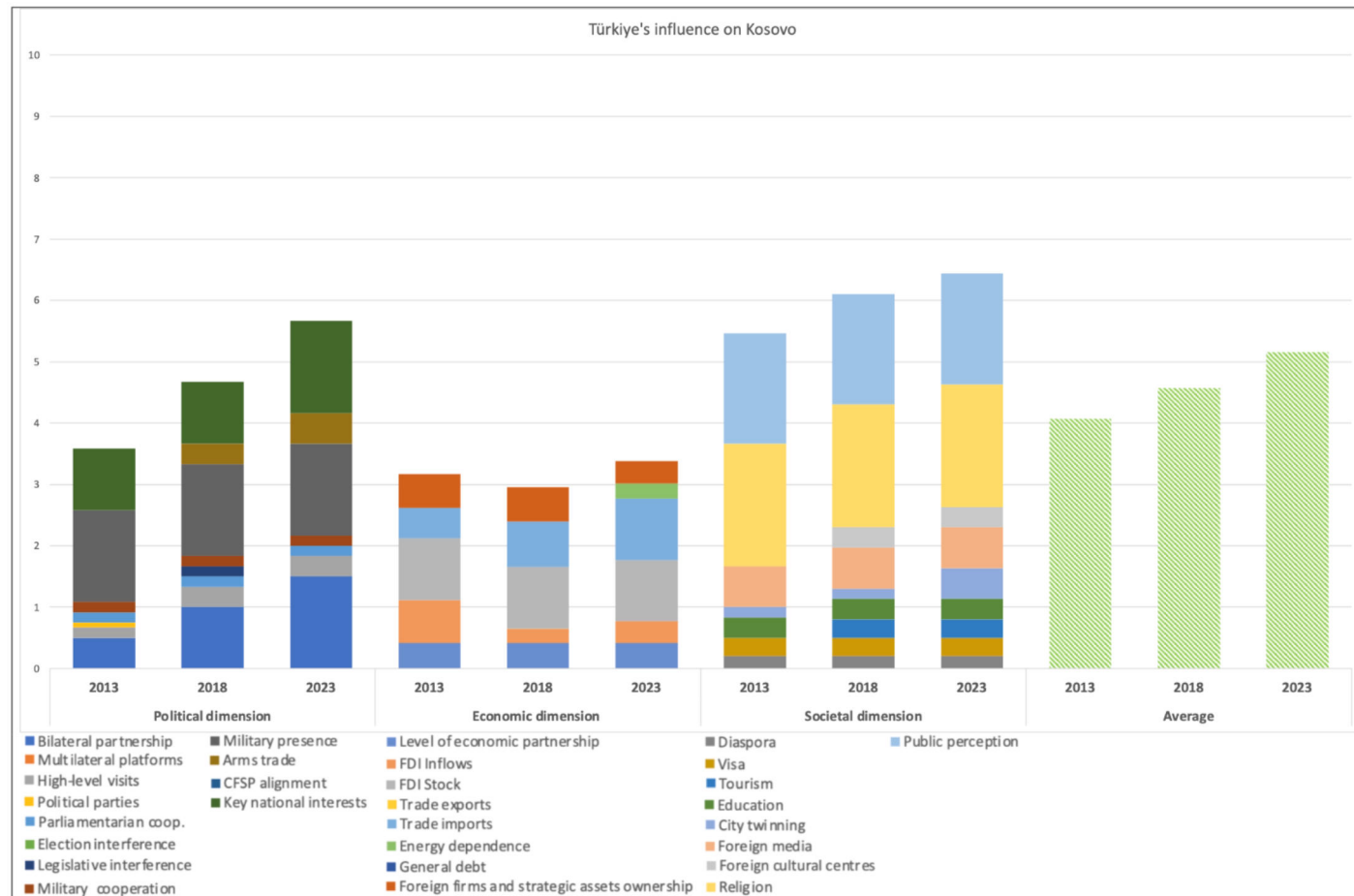
Annex II.3 Georgia

Figure 14: Turkey's Influence in Georgia (2013–2023)



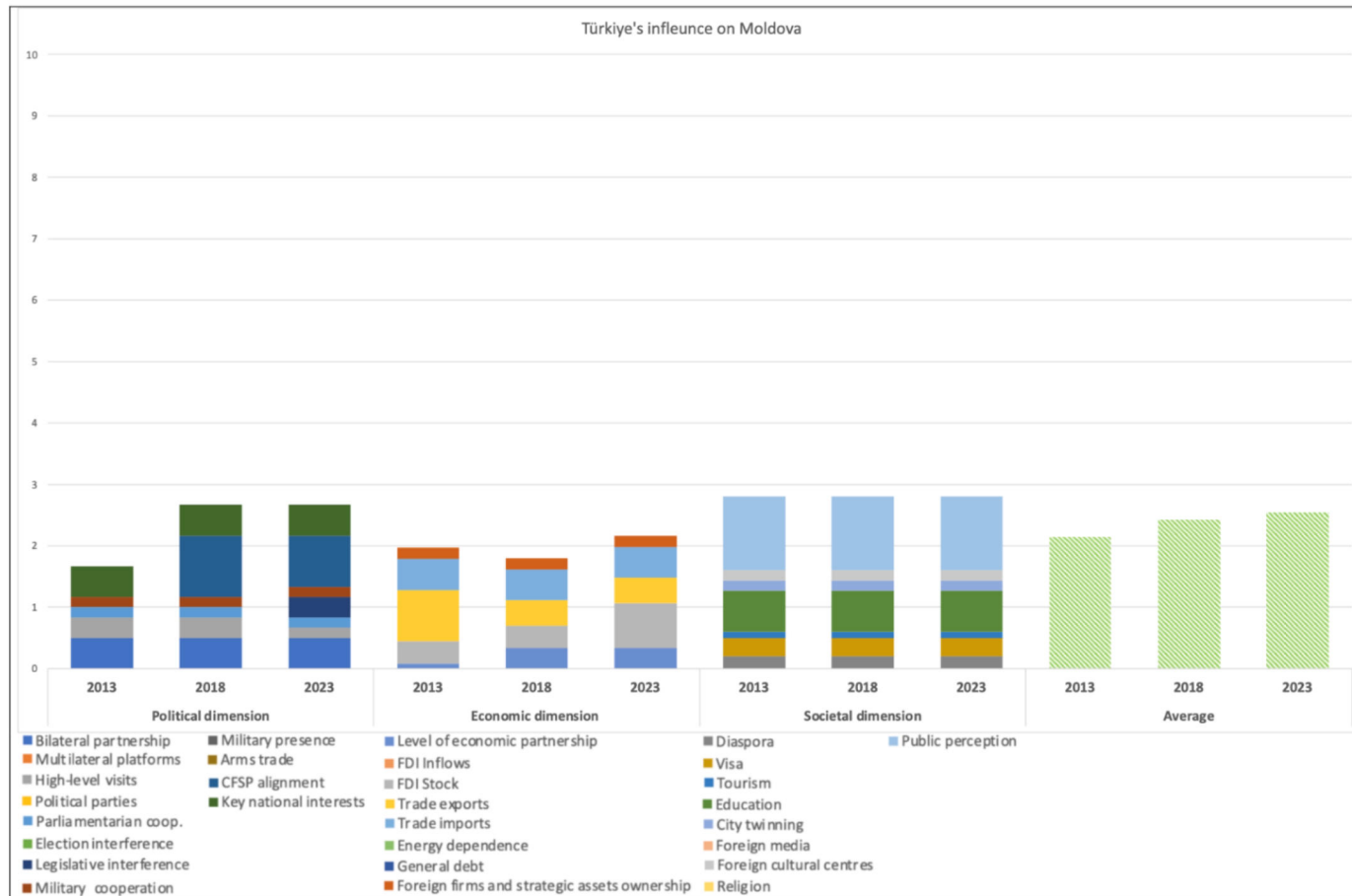
Annex II.4 Kosovo

Figure 15: Turkey's Influence in Kosovo (2013–2023)



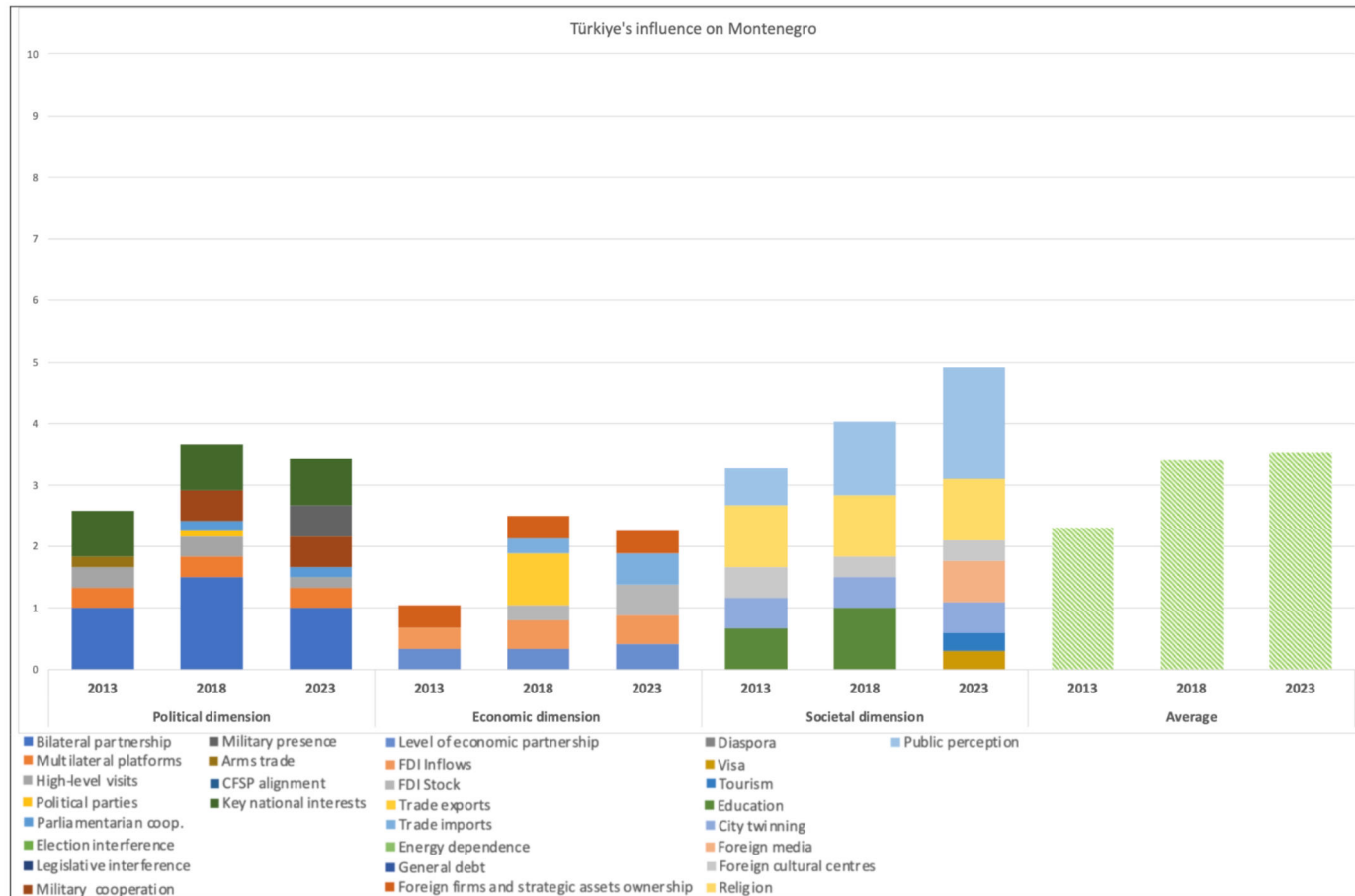
Annex II.5 Moldova

Figure 16: Turkey's Influence in Moldova (2013–2023)



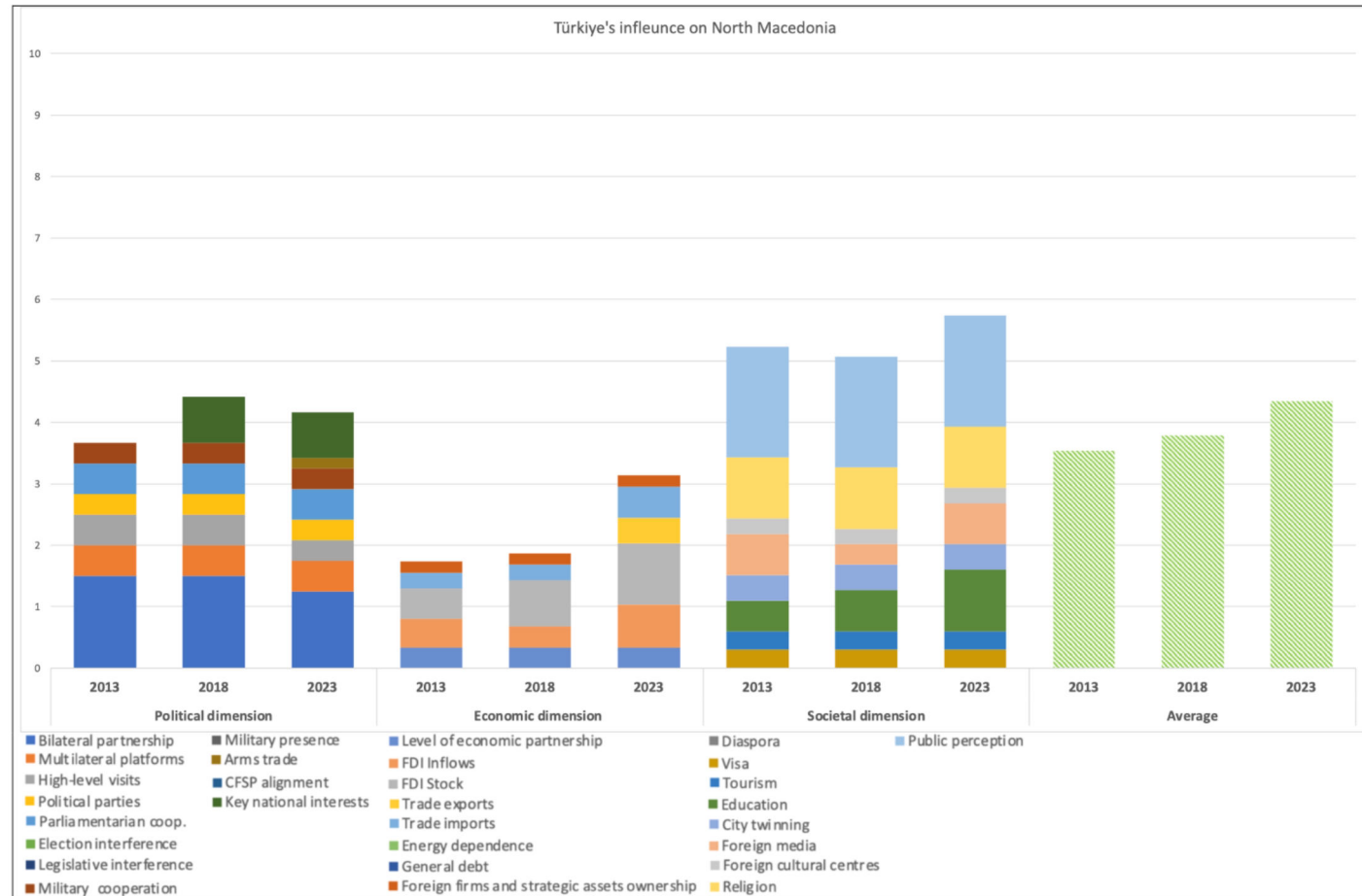
Annex II.6 Montenegro

Figure 17: Turkey's Influence in Montenegro (2013–2023)



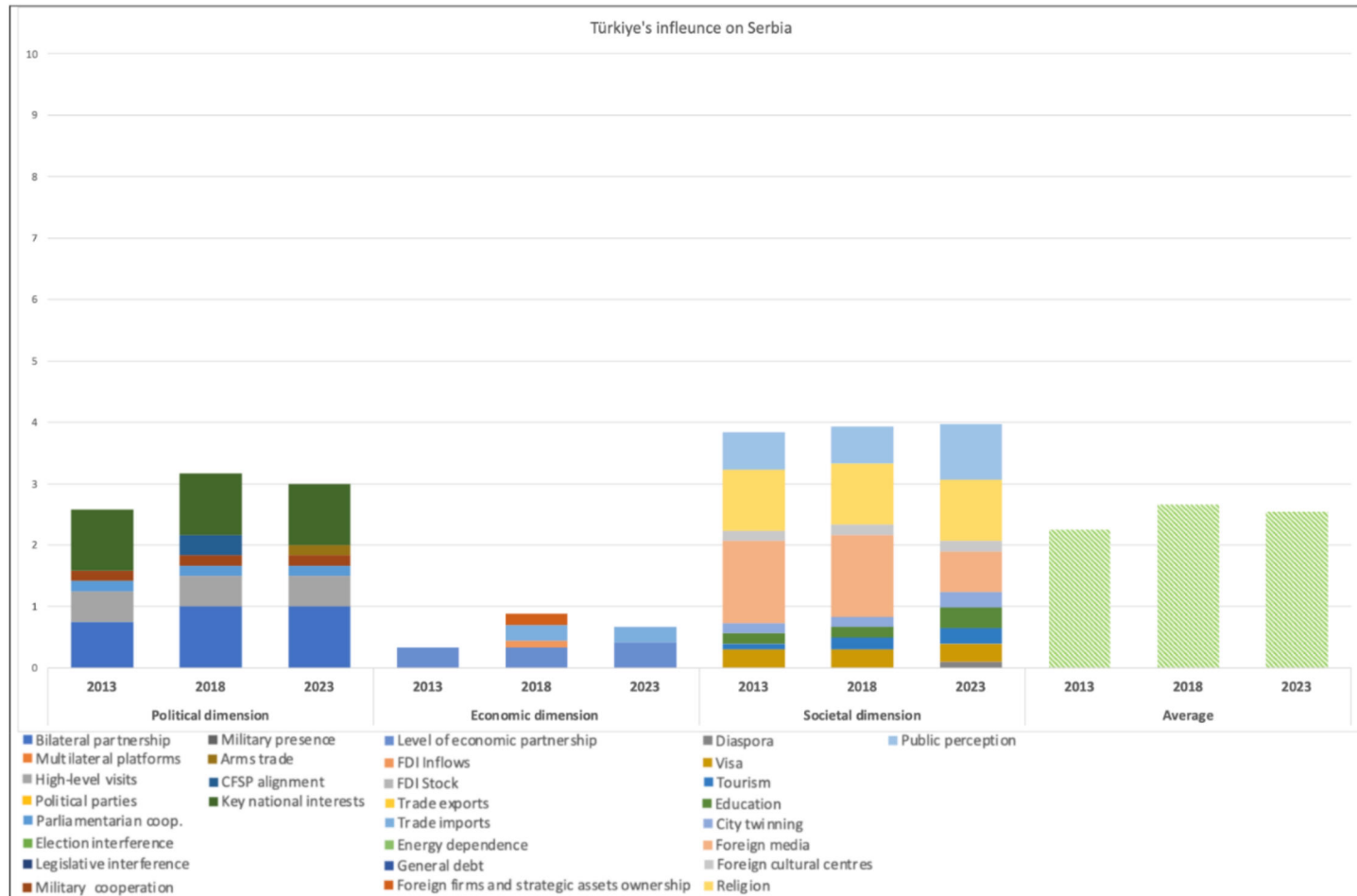
Annex II.7 North Macedonia

Figure 18: Turkey's Influence in North Macedonia (2013–2023)



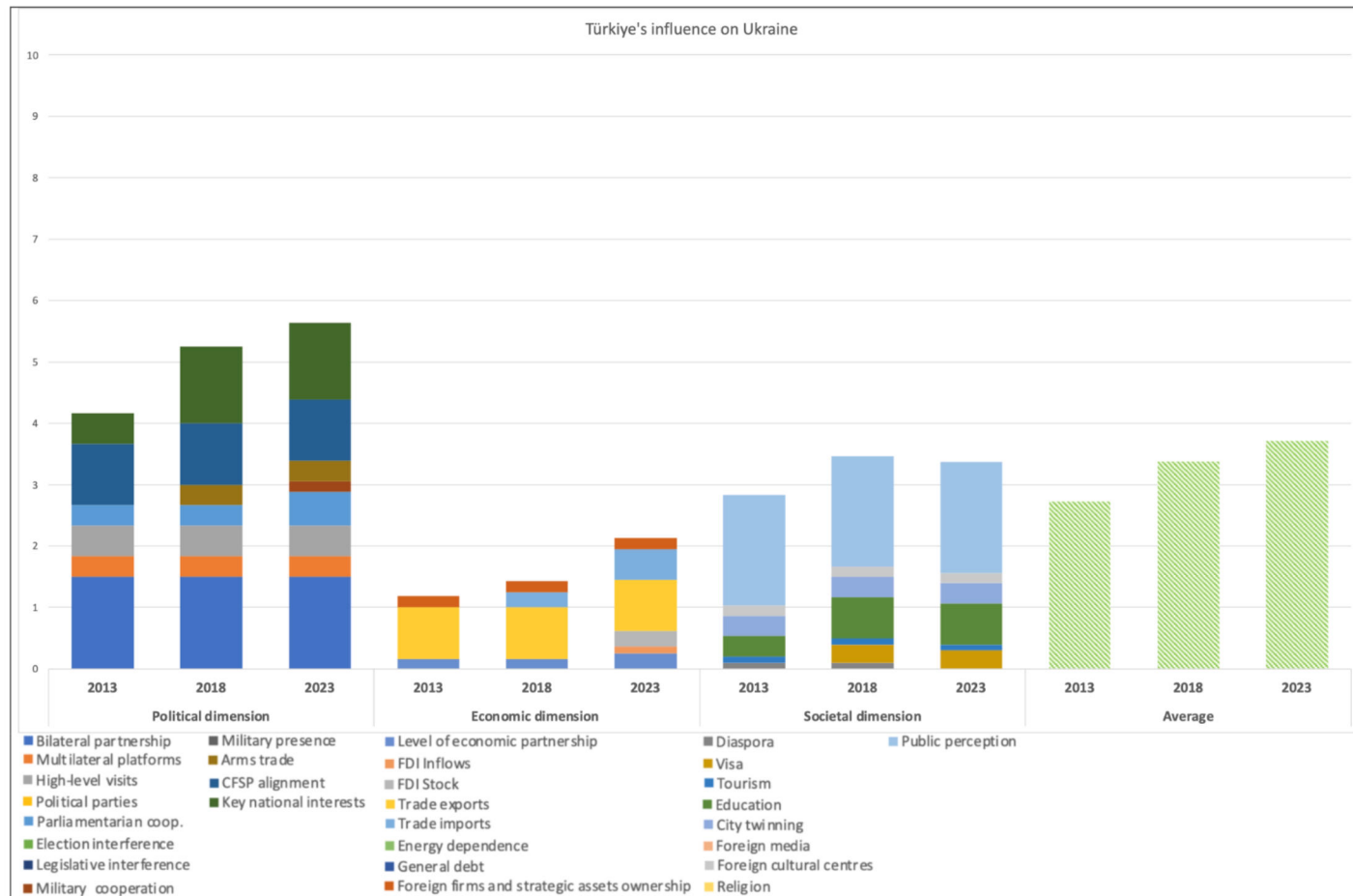
Annex II.8 Serbia

Figure 19: Turkey's Influence in Serbia (2013–2023)



Annex II.9 Ukraine

Figure 20: Turkey's Influence in Ukraine (2013–2023)



About InvigoratEU

InvigoratEU is a Horizon Europe-funded project, coordinated by the EU-Chair at the University of Duisburg-Essen (UDE) together with the Institut für Europäische Politik (IEP) in Berlin. The project, with a duration of 3 years from January 2024 until December 2026, examines how the EU can structure its future relations with its Eastern neighbours and the countries of the Western Balkans. The consortium has received around three million euros for this endeavour.

How can the EU invigorate its enlargement and neighbourhood policy to enhance Europe's resilience?

Our first goal is to investigate how to reform the EU's enlargement strategy in a new geopolitical phase, **HOW TO RESPOND** to other actors' geopolitical ambitions in the Eastern Neighbourhood and Western Balkans, and **HOW TO REBUILD** the EU's foreign policy arsenal in view of a new era of military threats (triple "R" approach) combining the modernisation and geopolitical logics of EU enlargement, leading to new data – e.g. a public opinion survey in Ukraine, a set of scenarios, an external influence index (Russia, China, Turkey), and a social policy compliance and cohesion scoreboard.



Our second goal is to elaborate an evidence-based, forward-looking vision for the EU's political agenda and institutional frameworks for co-designing a multidimensional toolbox (i.e. two tailor-made toolkits), together with InvigoratEU's Expert Hub, Civil Society (CS) Network, Youth Labs, Workshops for Young Professionals and Policy Debates in a gaming set up, which will result in context-sensitive and actionable policy recommendations for European and national political stakeholders and (young) European citizens in particular.

Our third goal is to deploy a CDE (communication, dissemination and exploitation) strategy aiming at recommendations from Day 1 to maximize our scientific, policy and societal impact in invigorating the EU's enlargement and neighbourhood policies to enhance Europe's resilience. Ultimately, InvigoratEU is a deliberately large consortium respecting the diversity of Europe and political perspectives; 7 out of 18 are from Georgia, Moldova, Ukraine, and the western Balkans (North Macedonia, Montenegro, Serbia), complemented by our Civil Society Network of 9 representatives from all Western Balkan countries, Georgia, Moldova and Ukraine.

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