



FLASH

IMPLICATIONS OF UPCOMING TURKISH PRESIDENTIAL AND PARLIAMENTARY ELECTIONS

ZEROFOX INTELLIGENCE

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Scope Note

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Implications of Upcoming Turkish Presidential and Parliamentary Elections

Key Findings

On May 14, Turkey will hold national elections for its presidency and the entire 600-seat parliament. Long-time leader Recep Tayyip Erdogan, who previously served as prime minister for 11 years, is seeking his third five-year term as president. His primary opponent is Kemal Kilicdaroglu, the leader of Turkey's main opposition Republican People's Party (CHP), who is backed by a rare coalition of five other opposition parties known as the Nation Alliance or Table of Six. President Erdogan's Justice and Development Party (AKP) is seeking to retain its governing position within parliament and has a history of challenging election results that do not go their way. A loss for Erdogan could see efforts to overturn the election results, which could lead to social unrest.

Kilicdaroglu has maintained a small but consistent lead over Erdogan in opinion polls. Erdogan's AKP party seems poised to lose seats in parliament, though it may remain the single largest party. A Kilicdaroglu victory will likely see positive economic developments for businesses operating in Turkey that have spent years battling record inflation—sometimes over 100 percent—and a consistently weakened local currency. However, multinational firms hoping for a transition back towards the West and away from Russia will likely be disappointed, as there is little difference between the two potential leaders' attitudes towards Russia.

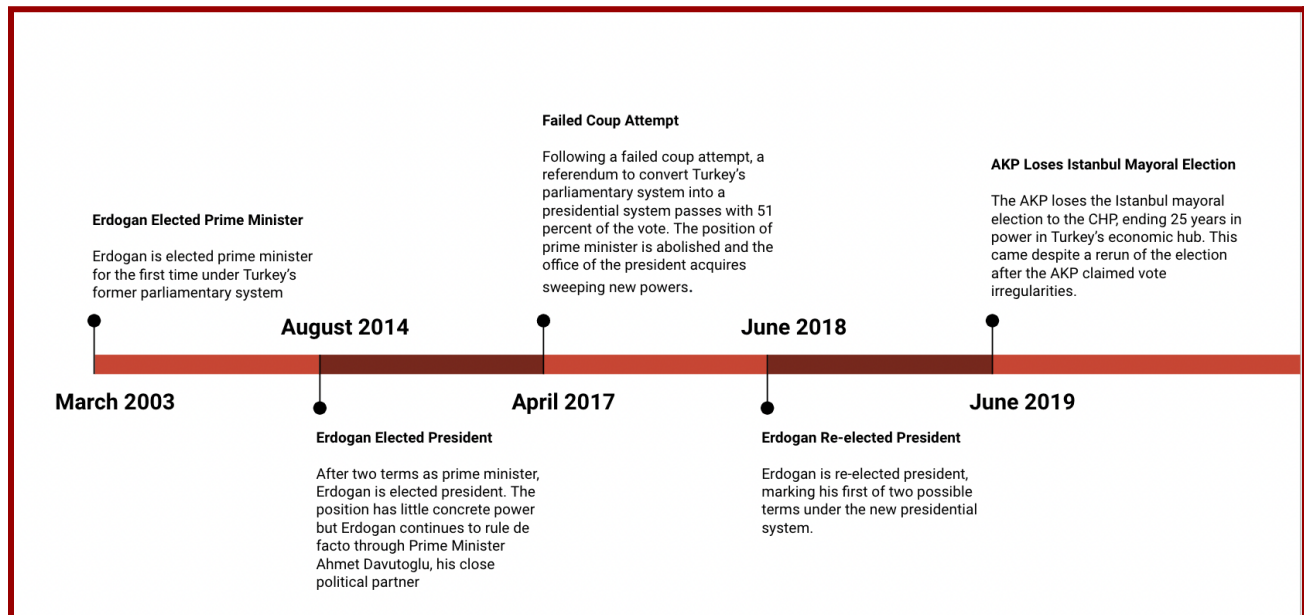
Analyst Commentary

Recent missteps have jeopardized Erdogan's support among voters. Long-running economic mismanagement has resulted in record inflation and drastic depreciation of



the local currency, the lira.¹ The government's slow and uncoordinated response to the February earthquakes that killed over 50,000 people caused widespread alarm regarding Turkey's ability to confront challenges under Erdogan's centralized style of governance, along with criticism that his administration did not enforce building codes.² As far back as 2019, a string of AKP defeats in mayoral elections led many to speculate that voters were beginning to turn against Erdogan. A recent bout of illness kept Erdogan off the campaign trail for several days and may contribute to a weakening of his strongman image.³

Timeline of Events



Timeline of Erdogan's Leadership in Turkey

Source: ZeroFox Intelligence Internal Collections

Implications

Erdogan could potentially use his extensive presidential powers to manipulate the election in his favor. In late April, Turkish authorities arrested over 100 dissidents, claiming without clear evidence they had collaborated with the insurgent Kurdistan Workers' Party (PKK).⁴ Additionally, Erdogan has exerted control over major state institutions, including the Supreme Court and Supreme Election Council. It is unclear if Erdogan will use these institutions to increase his election chances, though a narrow

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[hXXps://www.marketplace\[.\]org/2023/05/10/turkeys-soaring-food-prices-take-center-stage-in-presidential-election/](https://www.marketplace.org/2023/05/10/turkeys-soaring-food-prices-take-center-stage-in-presidential-election/)

² [hXXps://www.npr\[.\]org/2023/02/13/1156512284/turkey-earthquake-erdogan-building-safety](https://www.npr.org/2023/02/13/1156512284/turkey-earthquake-erdogan-building-safety)

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[hXXps://foreignpolicy\[.\]com/2023/04/14/turkey-election-kemal-kilicdaroglu-chp-platform-erdogan/](https://foreignpolicy.com/2023/04/14/turkey-election-kemal-kilicdaroglu-chp-platform-erdogan/)

⁴ [hXXps://www.dw\[.\]com/en/turkey-110-arrested-over-alleged-kurdish-militant-links/a-65424193](https://www.dw.com/en/turkey-110-arrested-over-alleged-kurdish-militant-links/a-65424193)



loss may make this more likely. A runoff election, which is looking increasingly likely, may also spur manipulation.⁵ In 2019, when Erdogan's candidate for the mayor of the capital Istanbul lost the election, Erdogan ordered a re-run election based on dubious claims of corruption and vote-rigging. The opposition won the re-run as well.⁶ Erdogan had more success in 2015 after his AKP lost parliamentary elections; he helped block coalition building until new elections were needed, and Erdogan eventually won the re-run elections.⁷ These incidents demonstrate Erdogan's willingness to interfere in the democratic process, which could lead to social unrest—especially if he challenges the integrity of an election he loses or if there are widespread accusations of fraud if he wins.

Kilicdaroglu has promised to reverse many of Erdogan's policies, though it remains unclear how effectively he can do so. He has pledged to revert Turkey's government from its current presidential system back to the pre-2017 parliamentary system and dial back interventions in regional conflicts.⁸ These efforts will face major obstacles if the AKP retains its power in parliament, if the fragile Nation Alliance coalition backing Kilicdaroglu fractures, or if AKP loyalists who remain in government spoil reforms.

While Kilicdaroglu has made many promises, it is still hard to predict how he would govern in the event of victory, as the Nation Alliance he leads is an ideologically disparate coalition united mostly in its opposition to Erdogan. The coalition includes the spectrum of parties from hard left to hard right—which are often criticized for not prioritizing the rule of law and democratic governance issues beyond rhetoric but instead focusing on the achievement and distribution of political spoils.

While Kilicdaroglu has expressed interest in pursuing closer relations with Western countries—which could include restarting talks on Turkey's accession to the European Union and closer military ties with the United States⁹—expect little change in foreign policy in the short term. Kilicdaroglu may find it difficult to use political capital on foreign policy changes that could alienate the domestic audience, especially when there are so many domestic political issues to deal with that are much more front-and-center with voters, such as addressing sky-high inflation, freeing political prisoners, lifting media and judicial restrictions, properly recovering from the earthquake, and helping the Turkish lira regain some of its value. Kilicdaroglu has

⁵ [hXXps://www.fdd\[.\]org/analysis/2023/04/28/what-if-erdogan-wins/](https://www.fdd.org/analysis/2023/04/28/what-if-erdogan-wins/)

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[hXXps://www.dw\[.\]com/en/istanbul-election-rerun-opposition-candidate-wins-key-mayoral-race/a-49321179](https://www.dw.com/en/istanbul-election-rerun-opposition-candidate-wins-key-mayoral-race/a-49321179)

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[hXXps://www.naharnet\[.\]com/stories/en/297417-turkey-s-closely-watched-vote-may-set-country-on-new-course](https://www.naharnet.com/stories/en/297417-turkey-s-closely-watched-vote-may-set-country-on-new-course)

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[hXXps://foreignpolicy\[.\]com/2023/04/14/turkey-election-kemal-kilicdaroglu-chp-platform-erdogan/](https://foreignpolicy.com/2023/04/14/turkey-election-kemal-kilicdaroglu-chp-platform-erdogan/)

⁹ [hXXps://www.politico\[.\]eu/article/turkey-2023-election-erdogan-kilicdaroglu/](https://www.politico.eu/article/turkey-2023-election-erdogan-kilicdaroglu/)



already said he wants to maintain relations with Russia,¹⁰ which remains a key trading partner and energy supplier. Therefore, Kilicdaroglu joining the Western sanctions regime against Russia is highly unlikely; doing so would likely prompt retaliation from Russia, which has agreed to allow Turkey a delay in paying for natural gas supplies because of positive relations with Erdogan.¹¹

Turkey will likely remain a neutral party that can negotiate with both Russia and Ukraine, maintaining its role as a key facilitator in the Black Sea grain initiative, which allows Russian and Ukrainian grain safe passage through the Black Sea with most inspections handled in Turkey.¹² There is, however, one foreign policy change that can be expected from a Kilicdaroglu presidency: the removal of Turkey's opposition to Sweden's membership in the North Atlantic Treaty Organization (NATO). Kilicdaroglu has said he will drop that opposition with the hope of getting Sweden's full approval into NATO by the July 2023 NATO summit.¹³

Based on recent polls in Turkey, the economy and record inflation are of the most concern to voters. Some predict a Kilicdaroglu victory would return Turkey to a more orthodox economic path, which could potentially attract foreign investment that has dried up in recent years and, over time, stabilize the lira. Difficult economic conditions would nonetheless persist for some time as reforms come into effect; economists predict continued inflation of 45 percent under Erdogan compared to a slow decline to 30 percent by the end of 2023 under Kilicdaroglu. However, while Kilicdaroglu can only make promises at this time, Erdogan has turned to quick monetary fixes in the run-up to the election by offering bonuses for retirees, free natural gas to households, and increases to wages.¹⁴

¹⁰ [hXXps://asiatimes\[.\]com/2023/05/whither-turkey-russia-relations-if-erdogan-loses/](https://asiatimes.com/2023/05/whither-turkey-russia-relations-if-erdogan-loses/)

¹¹

[hXXps://www.moscowtimes\[.\]ru/2023/05/03/putin-razreshil-turtsii-ne-platit-za-gaz-do-2024-goda-a41947](https://www.moscowtimes[.]ru/2023/05/03/putin-razreshil-turtsii-ne-platit-za-gaz-do-2024-goda-a41947)

¹²

[hXXps://www.aljazeera\[.\]com/news/2023/3/18/russia-ukraine-black-sea-grain-deal-extended-un-turkey](https://www.aljazeera[.]com/news/2023/3/18/russia-ukraine-black-sea-grain-deal-extended-un-turkey)

¹³

[hXXps://isdpr\[.\]eu/publication/if-the-opposition-beats-erdogan-swedens-nato-problem-is-over/](https://isdpr[.]eu/publication/if-the-opposition-beats-erdogan-swedens-nato-problem-is-over/)

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[hXXps://www.aljazeera\[.\]com/news/2023/5/9/turkey-raises-public-worker-salaries-by-45-days-before-elections](https://www.aljazeera[.]com/news/2023/5/9/turkey-raises-public-worker-salaries-by-45-days-before-elections)



Appendix: Traffic Light Protocol for Information Dissemination

	Red	Amber
WHEN SHOULD IT BE USED?	Sources may use TLP:RED when information cannot be effectively acted upon by additional parties and could lead to impacts on a party's privacy, reputation, or operations if misused.	Sources may use TLP:AMBER when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.
HOW MAY IT BE SHARED?	Recipients may NOT share TLP:RED with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.	Recipients may ONLY share TLP:AMBER information with members of their own organization and its clients, but only on a need-to-know basis to protect their organization and its clients and prevent further harm. Note that TLP:AMBER+STRICT restricts sharing to the organization only.
	Green	Clear
WHEN SHOULD IT BE USED?	Sources may use TLP:GREEN when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.	Sources may use TLP:CLEAR when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.
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