



Türkiye's Economic Policy Toward Iraq (2014-2024)

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ABSTRACT

This study examines Türkiye's economic policies toward Iraq from 2014 to 2024. It outlines Türkiye's strategic goals and initiatives in energy, trade, infrastructure, and regional security. Employing a neorealist theoretical framework, the research examines how Türkiye has employed economic measures to enhance its regional influence and safeguard national interests. Additionally, the analysis highlights Türkiye's position as a key transit hub for energy and trade, as well as its involvement in infrastructure initiatives, which serve as a pathway for development. The study also considers the influence of significant events, including the rise of the Islamic State of Iraq and Syria (ISIS), the Kurdistan Region of Iraq's independent oil exports, the 2017 independence referendum in the Kurdistan Region, and Türkiye's military actions in the Kurdistan Region on Turkish economic policymaking in Iraq. The findings highlight the intricate nature of economic policies intertwined with geopolitical factors, providing a deeper understanding of Türkiye's efforts to build interdependence with Iraq while addressing its regional challenges.



1. Introduction

Between 2014 and 2024, Türkiye's economic policy towards Iraq evolved into a complex strategy aimed at enhancing regional influence and safeguarding national interests. During this time, significant advancements occurred in energy cooperation, trade growth, infrastructure investment, and import diversification, all crucial in defining Türkiye's relationship with its southern neighbor.

Türkiye has emphasized developing pipelines and oil imports in the energy sector to enhance its energy security and establish itself as a regional energy hub. Although the Kirkuk–Ceyhan pipeline has faced challenges such as regional instability and legal disputes, it underscores Türkiye's strategic role in regional energy dynamics (Al Arabiya English, 2014). Economically, Iraq has become one of Türkiye's leading export markets, providing economic leverage and political influence in the area. Turkish companies' infrastructure investments have been crucial in Iraq's reconstruction, especially in conflict-affected regions, solidifying Türkiye's long-term economic presence and influence in Iraq (TAV Construction 2024; TİKA, 2019). Furthermore, Türkiye has diversified its imports from Iraq beyond energy, prioritizing agricultural and industrial products to stabilize its economic policy towards Iraq and minimize vulnerability to fluctuations in the energy market.

Nevertheless, these economic interactions faced several challenges. The emergence of ISIS in 2014 compelled Türkiye to adjust its economic approaches, including a focus on KRG oil imports, which led to legal conflicts and financial setbacks (Cagaptay et al., 2015). The KRG's independent oil exports created tensions with Baghdad, leading Türkiye to suspend KRG oil imports after legal determinations. Additionally, Türkiye's military actions in KRG disrupted trade routes and increased transportation expenses, significantly impacting the Kurdistan Region, a vital conduit for Turkish exports.

Despite these challenges, Türkiye's strategic economic policy with Iraq emphasized its commitment to national interests by balancing power, maintaining security, and ensuring regional influence amidst shifting geopolitical dynamics.

This study aims to thoroughly examine Türkiye's economic policy towards Iraq from 2014 to 2024, focusing on the primary drivers, challenges, and strategic objectives that have influenced Türkiye's economic approach to Iraq.

1.1 Research Problem

This study primarily examines the uncertainty surrounding Türkiye's strategic economic objectives in Iraq and the KRG from 2014 to 2024, despite considerable engagement in energy, trade, infrastructure, and security sectors. Although Türkiye aimed to enhance energy security via the Kirkuk–Ceyhan pipeline, increase trade, and fund reconstruction, these efforts were often hampered by factors such as ISIS's rise, the KRG's independent oil exports, the 2017 independence referendum, Türkiye's military interventions, and legal disputes like the 2023 ICC arbitration. These developments raise critical questions: what strategic goals underpin Türkiye's economic policies



toward Iraq, and how have these major events affected policy shifts in energy, trade, infrastructure, and security? This research aims to explore these questions, thereby bridging the gap between declared strategies and actual policy actions.

1.2 Research Questions:

The main question is:

What were Türkiye's strategic objectives in its economic policy toward Iraq from 2014 to 2024, particularly in energy, trade, infrastructure, and regional security?

The secondary question is:

How did events such as the rise of ISIS, KRG's oil exports, the 2017 independence referendum, and Türkiye's military actions influence Türkiye's economic policy toward Iraq during this period?

1.3 Research Objectives:

- To analyze Türkiye's energy policy toward Iraq (2014–2024).
- To evaluate shifts in Türkiye's trade policy toward Iraq by assessing trade balance, imports/exports, and trade agreements over the decade.
- To assess the development and impact of Türkiye-funded infrastructure projects in Iraq between 2014 and 2024.
- To investigate how regional security considerations informed Türkiye's economic policy toward Iraq, focusing on key military and diplomatic interventions.
- To examine how major events—ISIS emergence, KRG oil exports, the 2017 referendum, and Türkiye's military actions- shaped specific policy changes in the above domains.

1.4 Importance of the Research

This study analyzes Türkiye's economic policies concerning Iraq and the Kurdistan Regional Government (KRG) from 2014 to 2024, concentrating on three primary sectors: energy, trade, and infrastructure. It examines the main events effected on that policy. The findings offer important insights for policymakers, researchers, and international stakeholders, underscoring the importance of understanding these policies for fostering future collaboration and sustainable development in the region.

1.5 Methodology

This section provides a comprehensive overview of Türkiye's economic policy toward Iraq from 2014 to 2024. It is organized into two sub-sections: 5.1.1 Research Methodology, describing the mixed-methods approach employed in the study, and 5.1.2 Theoretical Framework, which examines the neorealist perspective used to interpret the



findings. Collectively, these sub-sections offer a well-structured analysis that blends methodological detail with theoretical understanding.

1.5.1 Research Methodology

This study employs a mixed-methods design, specifically a convergent parallel approach, to analyze Türkiye's economic policy toward Iraq from 2014 to 2024. It collects and analyzes both qualitative and quantitative data simultaneously, integrating them during interpretation. Qualitative analysis involves reviewing policy documents and official communications from Turkish, Iraqi, and KRG authorities, as well as scholarly analyses and media reports (e.g., Reuters, AP, Al Jazeera, Al Arabiya, Daily Sabah, Kurdistan24, Rudaw) to identify policy motives, stakeholder positions, and regional discourse. Quantitative analysis examines economic indicators such as trade volumes, energy exports, foreign direct investment, and GDP from sources like Trading Economics (2024–25), YCharts (2023), OEC (2023), UN COMTRADE (2024), Iraq EITI Report (2016), EIA (2014–15, 2022, 2024), GlobalData (2024), Middle East Economic Survey (2022–23), Deloitte (2022), and Holtmeier & Al Khayat (2025). The data are collected and analyzed separately before combining results during interpretation to triangulate findings and verify narratives with numerical evidence. The methodology ensures rigor through transparent data extraction, clear variable definitions (e.g., trade in USD, energy in barrels per day, GDP growth), and acknowledgment of data limitations, such as informal trade channels.

1.5.2 Theoretical Framework

Neorealism is a well-known theory in international relations that provides a framework for understanding state behavior in an anarchic global system. It posits that states are rational actors focused on advancing their national interests and security (Waltz, 1979. pp. 79–128). The theory has two main variants: offensive neorealism, which suggests that states are inherently aggressive and aim to maximize power to secure safety, and defensive neorealism, which emphasizes that states act to preserve security without overextending (Mearsheimer, 2001. pp. 29–54).

These theoretical assumptions can be used to analyze Türkiye's policy toward Iraq from 2014 to 2024. A major turning point was ISIS's rise in 2014, prompting Türkiye to reassess its regional security strategy. Following offensive neorealism principles, Türkiye took a more assertive military approach to counter ISIS's potential influence and target the PKK, a Kurdish militant group close to its borders (Gilpin, 1981. pp. 167–214).

Furthermore, Türkiye's reaction to the 2017 Kurdistan Region of Iraq (KRI) independence referendum can be understood as a response to perceived threats to its territorial integrity and national unity, consistent with Mearsheimer's theory of defensive realism. In line with this theory, states act to safeguard their borders and sovereignty, and Türkiye's opposition to the referendum illustrates this defensive posture. By opposing the referendum, Türkiye aimed to contain separatist movements



and uphold regional stability, which it views as essential to its national security (Mearsheimer, 2001. pp. 29–54).

In summary, neorealism is an appropriate theoretical framework to understand Türkiye's economic policy toward Iraq (2014–2024). It helps analyze its military reactions to ISIS and the PKK through offensive realism, while its initiatives to enhance energy and economic relations with Iraq reflect defensive realist strategies.

1.6 Structure of the Research

This study is organized into four main sections: an Introduction outlining Türkiye's economic policies toward Iraq and the KRG from 2014 to 2024, including the study's aims and significance; a Methodology section describing a mixed-methods approach using secondary data and thematic analysis; an Analysis and Discussion section divided thematically to explore Türkiye's roles in energy imports, trade exports, and infrastructure development; and a Conclusion that briefly summarizes the main findings and concludes the research.

2. Türkiye's Key Economic Interdependence Policies Toward Iraq

From 2014 to 2024, Türkiye's economic policy towards Iraq focused on enhancing regional influence and safeguarding national interests through energy cooperation, promoting trade growth, investing in infrastructure, and diversifying imports. In energy, Türkiye emphasized building pipelines and increasing oil exports to enhance its energy security and establish itself as a regional energy hub, thus strengthening its geopolitical position (Siccardi, 2024). Iraq has emerged as a primary export market for Türkiye, functioning as a means of economic leverage and political power in the region (Ministry of Foreign Affairs of Türkiye, 2023). Infrastructure projects undertaken by Turkish firms were vital in Iraq's reconstruction, especially in conflict-impacted areas, securing Türkiye's prolonged economic involvement and influence in Iraq (Yorulmaz, Demirdöğen, and Akıncı, 2021). Moreover, Türkiye expanded its imports from Iraq beyond the energy sector, concentrating on agricultural and industrial goods to stabilize its trade policy towards Iraq and lessen dependency on energy market volatility (Kalel, 2024).

Together, these policies underscore Türkiye's use of economic interdependence to advance its broader political and security goals in Iraq from 2014 to 2024.

2.1 Energy Policy Toward Iraq

Energy collaboration continues to be a key aspect of Türkiye's economic strategy regarding Iraq, notably through the Kirkuk–Ceyhan Oil Pipeline. This pipeline, responsible for transporting Iraqi oil to Türkiye's Ceyhan port, has become even more significant following the Kurdistan Regional Government's (KRG) establishment of an independent oil export route (Reuters, 2024).



Between 2014 and 2024, Türkiye's energy policy regarding Iraq evolved regarding pipeline strategies and varying import levels, influenced by regional instability, legal challenges, and bilateral relations. In 2014, Turkish Energy Minister Taner Yildiz mentioned that Türkiye imported 32.2 million barrels of crude oil from Iraq through the Kurdish-built pipeline beginning in May, achieving an average of about 134,000 barrels per day (bpd) over the next eight months (Al Arabiya English, 2014). That year, Iraq's oil production averaged 3.4 million bpd, with the KRG accounting for roughly 400,000 bpd, representing about 12% of the country's total output (KRG Ministry of Natural Resources, 2014, p.5; EIA, 2014).

In 2015, Türkiye imported 192.4 million barrels via the Kirkuk–Ceyhan pipeline, which averaged around 527,000 bpd for the entire year (Daily Sabah, 2016). Iraq's crude oil output rose to 4.0 million bpd, with the KRG increasing its share to roughly 500,000 bpd, representing about 12.5% of total production. Following mid-2015, supported by independent infrastructure, the KRG resumed its autonomous sales due to ongoing disputes with Baghdad (EIA, 2015; KRG Ministry of Natural Resources, 2015, p. 6; Iraq EITI Report, 2016, p. 90).

As of 2016, Türkiye imported around 3.5 million bpd of oil from Iraq (Iraq EITI Report, 2016), with Iraq's overall production peaking at 4.6 million bpd. The KRG supplied 550,000 bpd as part of an oil revenue-sharing agreement (Al-Khatteeb, 2016; Trading Economics, 2025).

In 2017, Türkiye's crude oil imports from Iraq fell by 20.5% compared to 2016, averaging approximately 615,000 bpd (Daily Sabah, 2017). Iraq's total production remained around 4.45 million bpd (GlobalData, 2024; YCharts, 2023), with the KRG accounting for about 12%—or roughly 600,000 bpd (Dziadosz, 2017).

This decline occurred against a backdrop of escalating tensions, especially after October 2017, when shipments from Kirkuk stopped, leading to a decrease in output by roughly 300,000 bpd (Al Jazeera, 2018). As a result, Türkiye's oil imports from Iraq in 2018 varied between 437,768 and 737,768 bpd (Kurdistan24, 2018), while Iraq's total production averaged 4.5 million bpd. Notably, Türkiye's oil imports from the KRG dropped from around 600,000 bpd in 2017 to about 316,000 bpd in 2018, illustrating the effects of the September 2017 referendum and subsequent disruptions (Roberts, 2019).

In 2019, Iraqi Oil Minister Thamer al-Ghadhban mentioned that Türkiye imported approximately 80,000 to 90,000 bpd of oil from Kirkuk, as most of the production was utilized to supply domestic refineries in KRG (Kurdistan24, 2023). Iraq's annual oil production reached 4.7 million bpd, with the KRG accounting for 470,000 bpd (EIA, 2022, p.1; Saadi, 2020).

In 2020, oil production dropped to 4.1 million bpd due to the COVID-19 pandemic and OPEC+ restrictions (EIA, 2022, p.1). At the same time, Türkiye's average crude oil imports from Iraq reached 236,000 bpd, a 24% increase from the prior year (Cockayne and Stevenson, 2021). The KRG's production slightly increased to 450,000 bpd, underscoring its vital role despite the decline in global demand (KRG, 2021).



As 2021 progressed, Türkiye imported an average of 633,000 barrels per day (bpd) of crude oil from Iraq, establishing Iraq's top crude supplier for the year (Cockayne, 2022). Iraq's production was approximately 4.03 million bpd, with the Kurdistan Regional Government (KRG) accounting for 420,000 bpd—around 10% of the total output (Aziz, 2022; Enerdata, 2023).

In 2022, Türkiye's imports from Iraq decreased to 251,000 bpd, down from the previous year (Middle East Economic Survey, 2023). Federal production stood at an average of 3.4 million bpd, with the KRG exporting 400,000 bpd via the Iraq–Türkiye pipeline. Despite the Federal Supreme Court of Iraq declaring the KRG's exports unconstitutional in February 2022, shipments persisted until March 2023 (Reuters, 2024; Deloitte, 2022).

In early 2023, Türkiye imported 450,000 bpd from Iraq until March 25, when the pipeline was halted following a favorable arbitration ruling for Baghdad (Reuters, 2024; Rudaw, 2025). Before this, the KRG exported roughly 400,000 bpd through Ceyhan (Rudaw, 2023). APIKUR estimated that Iraq incurred a loss of about \$1 billion each month due to the suspension (Kurdish Globe, 2025). Following the pipeline closure, federal Iraq continued to export approximately 3.374 million bpd, not including Kurdish volumes (Al-Obaidi, 2024).

Most recently, in 2024, Türkiye's crude oil imports from Iraq dropped to 101,900 bpd (Holtmeier and Al-Khayat, 2025).

The data presented above depicts Türkiye's yearly energy imports from Iraq and the Kurdistan Regional Government (KRG) from 2014 to 2024, illustrated in the line chart below.

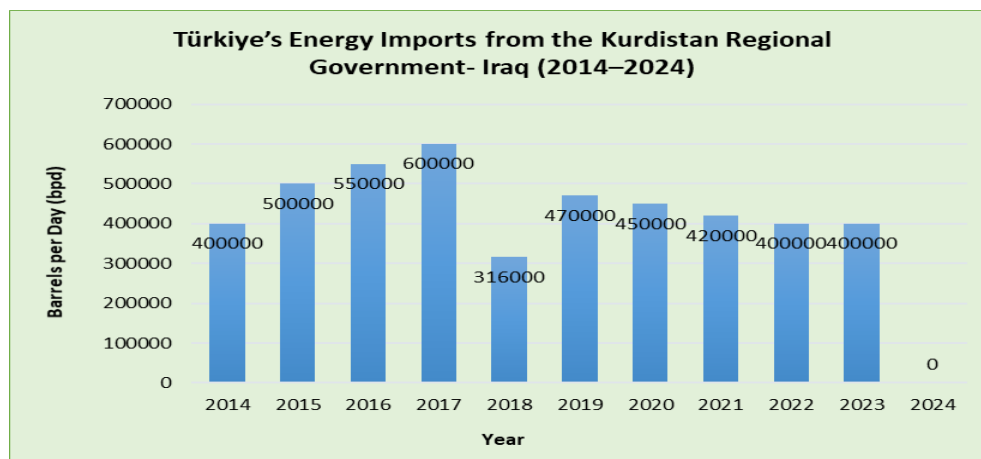


Figure 1: Türkiye's Energy Imports from the Kurdistan Regional Government-Iraq (2014–2024), in barrels per day.

Source: Compiled by the authors based on the above data.

Several factors drove Türkiye's engagement in supporting this oil transit. Strategically, as the main export pathway for KRGi oil, Türkiye increased its significance in regional energy markets, gaining influence in its political and economic ties with Baghdad and Erbil (Saeed, 2023). Furthermore, Türkiye aimed to diversify its



energy sources and lessen its dependence on politically unstable suppliers like Iran and Russia. By facilitating the passage of Iraqi and Kurdish oil through the Kirkuk–Ceyhan pipeline, Ankara enhanced its role as a regional energy hub and bolstered its energy security (Yılmaz, 2017).

Economically, Türkiye gained numerous advantages during this time. Firstly, regarding transit fees and revenue, Türkiye received substantial fees and taxes for transporting federal Iraqi and KRG oil through its territory and infrastructure. Specifically, the Federal Government of Iraq (FGI) pays about \$6 per barrel, while the KRG pays around \$25 per barrel (Hussein, 2021). Secondly, the growth of Turkish business interests was a result of strengthened economic relationships and increased Turkish exports to the KRG, positioning it as one of Türkiye's largest export markets (Akyener and Kayael, 2015). Lastly, the rise in oil imports from Iraq and the KRG contributed to energy security and supply diversification, ensuring a reliable and varied source of crude oil, crucial for Türkiye's expanding economy and energy requirements (Saeed, 2023).

Politically, Türkiye made significant internal and external strides through its energy cooperation with Iraq and the KRG. On the domestic front, Ankara's approach centered on diminishing dependence on Russian and Iranian energy imports by emphasizing diversification and energy security. The collaboration with the KRG opened access to extensive oil and gas reserves, bolstering Türkiye's goal to become a regional energy leader (Palani, Ala'Aldeen and Cersosimo, 2018; Tol, 2014).

Externally, Türkiye bolstered its cooperation with Baghdad and the KRG, signing significant agreements on oil and gas transit and infrastructure. Direct pipeline agreements with the KRG enabled Kurdish oil exports to reach international markets through Türkiye, despite legal objections from Baghdad. This trilateral energy collaboration enhanced Türkiye's regional influence and positioned it as a mediator between Iraq's central government and the KRG (Shokri, 2024; Tol, 2014).

Ultimately, Türkiye reconciled economic needs with geopolitical factors. By utilizing energy connections, it sought to promote regional stability, address its energy requirements, and strengthen its diplomatic power in discussions with Iraq and the KRG (Siccardi, 2024; Palani, Ala'Aldeen, and Cersosimo, 2018).

Overall, Türkiye's energy policy towards Iraq from 2014 to 2024 highlights how Ankara effectively utilized its position as a transit hub—primarily through the Kirkuk–Ceyhan pipeline, to further its national economic interests, broaden its energy sources, and enhance its regional influence. this approach from a neorealist standpoint showcases Ankara's aim for national power and security via economic means, reinforcing its long-term geopolitical ambitions in Iraq.

2.2 Türkiye's Trade Policy Toward Iraq

This section consists of two parts: the first discusses the yearly trade export volumes, and the second examines Türkiye's strategic economic approach to Iraq.



2.2.1 The Annual Trade Export Volumes

In 2014, exports amounted to \$13.154 billion, positioning Iraq as Türkiye's second-largest export market after Germany (World Bank, 2016). However, this period also heralded significant challenges, particularly due to the ISIS threat and disruptions in trade routes (Daily Sabah, 2014). As a result, as per Iraqi import statistics, Türkiye's total exports dropped to around \$8.5 billion (COSIT, 2015). Furthermore, official World Bank WITS data reveals that Türkiye exported goods worth \$7.6 billion in 2016 (World Bank, 2024). In 2017, Türkiye's exports to Iraq increased to \$9.0 billion (World Bank, 2024). Between 2017 and 2019, Türkiye saw a gradual recovery, marked by enhanced involvement and stabilization efforts, resulting in exports reaching \$9.43 billion by 2018—a 30% rise from 2016 levels (OEC, 2023). By 2019, exports to Iraq had climbed to \$10.2 billion, while the trade volume between the two nations stood at \$15.8 billion (Ergocun and Bicer, 2020).

The COVID-19 pandemic in 2020 caused major disruptions, resulting in Turkish exports to Iraq plummeting to \$4.8 billion—a decrease of over 50% from 2019. However, trade persisted under “contactless trade” protocols at border crossings (Shafaq News, 2020). Recovery efforts in 2021 proved successful, with exports surging to \$11.1 billion and further rising to \$13.8 billion in 2022 (Trading Economics, 2025). This was followed by a slight decline to \$12.8 billion in 2023. A further increase to \$13.034 billion was noted in 2024, and by then, Iraq had emerged as Türkiye's fourth-largest export market, representing 5% of its overall exports (Shafaq News, 2025).

Türkiye's exports to Iraq have varied yet focused on key sectors. In 2023, the main exports were jewelry (\$1.35 billion), wheat flour (\$551 million), and poultry meat (\$520 million). Over the last five years, exports from Türkiye to Iraq have grown at an annual rate of 6.21%, increasing from \$9.43 billion in 2018 to \$12.8 billion in 2023 (OEC, 2023). Notable exports in 2024 included jewelry (\$1.01 billion), electrical and electronic equipment (\$751.43 million), machinery (\$721.18 million), furniture and prefabricated buildings (\$611.70 million), plastics (\$551.04 million), and food preparations (\$539.06 million), among others (Trading Economics, 2025). In the first half of 2024, Iraq became the largest importer of Turkish food products, accounting for 14% of Türkiye's total food exports, valued at \$1.6 billion. Essential food items were flour (\$238 million), poultry meat (\$185 million), assorted fruits (\$58 million), and biscuits (\$143 million) (Kalel, 2024). The Ibrahim Khalil border crossing in the Kurdistan Region continues to serve as the central transit hub, facilitating almost 90% of trade operations (Shafaq News, 2025).

From 2014 to 2024, Türkiye's exports to the Kurdistan Regional Government (KRG) were fundamental to the region's economy and vital to Türkiye's trade with Iraq. Despite facing challenges like the ISIS conflict (2014–2017), political disputes, and occasional border closures, Turkish exports to the KRG consistently represented the majority of Türkiye's trade with Iraq, with annual figures generally ranging from \$5 billion to nearly \$10 billion by 2024 (Shafaq News, 2024; Yakut, 2023). More than 85%



of these exports traversed the Ibrahim Khalil border crossing, establishing it as the main trade route (KRSO, 2017). Key Turkish exports comprised food products, construction materials, household items, and machinery, which were vital for everyday life and post-conflict rebuilding in the KRG. Turkish construction companies also maintained a strong presence, further strengthening economic ties (Yakut, 2023). As of late 2024, the Erbil Chamber of Commerce reported that Türkiye-KRG trade approached nearly \$10 billion annually, highlighting the resilience and expansion of this bilateral relationship (Shafaq News, 2024). This decade-long partnership has solidified the KRG's position as Türkiye's primary export market in KRG, setting it apart from broader Iraq-Türkiye trade dynamics.

In April 2024, Türkiye enhanced its strategic trade policy by finalizing over 24 Memoranda of Understanding (MoUs) with Iraq, focusing on sectors like economy, trade, water, and security, thus formalizing collaboration (Rudaw, 2024). Increasing trade volumes bolster this initiative—Nawaf Qilij, head of the International Association of Industrialists and Businessmen in Türkiye, forecasts that Turkish exports to Iraq will approach around \$16 billion soon (Shafaq News, 2025).

Although Türkiye's exports lead in the trade balance, imports from Iraq are relatively low, primarily comprising non-energy goods. In 2024, Türkiye imported \$1.83 billion worth of goods from Iraq, as reported by the United Nations COMTRADE database on international trade.

In 2024, Türkiye imported various raw materials and agricultural products, including wood pulp (\$60.81 million), copper (\$31.42 million), aluminum (\$13.24 million), plastics (\$11.66 million), hides and skins (\$9.85 million), beverages (\$8.19 million), cereals (\$7.89 million), pearls and precious stones (\$6.45 million), and lead (\$3.89 million), among others (Trading Economics, 2024). Throughout the past ten years, Türkiye's average monthly non-oil imports from Iraq have remained around \$151.89 million, influenced by political instability and policy shifts (World Bank, 2014). While Iraq continues to provide agricultural products like dates, cereals, and animal hides, these items represent a small fraction of the overall trade, highlighting a significant imbalance in trade relations (Trading Economics, 2024; World Bank, 2014).

The data presented above shows Türkiye's yearly trade exports to Iraq and the Kurdistan Regional Government (KRG) spanning from 2014 to 2024, as depicted in the line chart below.

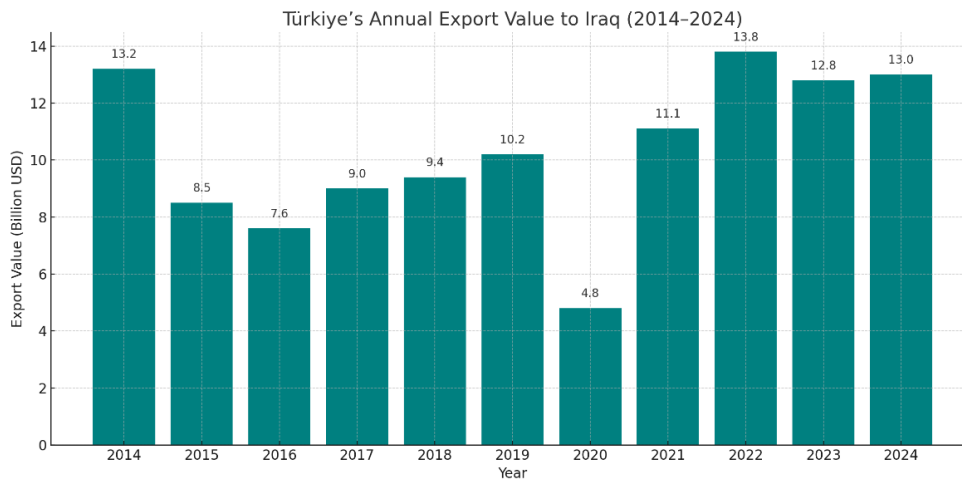


Figure 2: Türkiye's Export Value to Iraq (2014–2024), in USD Billion

Source: Compiled by the authors based on the data above

2.2.2 Türkiye's Strategic Economic Policy Toward Iraq

Türkiye's trade policy towards Iraq during this period was strategically crafted to align with its broader political, economic, and security objectives. Ankara aimed to enhance its influence in post-conflict Iraq, maintain relationships with Baghdad and the Kurdistan Regional Government (KRG), and counter Iranian leverage (Michalski, 2024; MEI, 2024).

Economically, Türkiye is striving to enhance its cooperation with Iraq, targeting an increase in trade to \$30 billion by 2024, focusing on energy, agriculture, logistics, and construction sectors. Additionally, it is advancing the 'Development Road' project to improve transport links between Iraq, Türkiye, and Europe, which could shorten cargo transit times by up to 15 days (Shafaq News, 2024). Furthermore, security considerations have been crucial to trade policy. Since 2019, Türkiye's military operations against the PKK in KRG have aligned with economic initiatives. Iraq's 2024 classification of the PKK as a "banned organization" and heightened joint military cooperation highlighted the synergy between trade and security objectives. Integrating anti-PKK strategies with the Development Road project exemplifies a purposeful approach to secure trade routes (Okuducu, 2024; Rudaw, 2025).

These initiatives have fulfilled domestic and regional goals—strengthening national unity by managing Kurdish militancy and reinforcing Ankara's standing in the region while capitalizing on Iraq's reconstruction efforts. By 2024, Türkiye had increased its exports to Iraq tenfold since 2009 and expanded its infrastructure presence, despite ongoing water disputes that remain a point of contention (Shafaq News, 2024; MEI, 2024).

Overall, from 2014 to 2024, Türkiye's strategic economic policy toward Iraq aimed to increase trade to strengthen its influence in Iraq. This strategy intertwined security with economic objectives, resulting in notable trade expansion and infrastructure progress. Under the lens of neorealism, this policy illustrates Türkiye's pursuit of



national interests, balancing power, securing its territory, and reinforcing its regional influence in a changing geopolitical landscape.

2.3 Türkiye's Infrastructure Policy Toward Iraq

Over the last decade, Türkiye's infrastructure investments have focused on large-scale projects and strategic partnerships, influenced by economic and geopolitical aims. The Development Road Project is the key initiative in this effort (Ozturk, 2024). It aims to lessen dependence on the Suez Canal while boosting trade efficiency between Asia, the Gulf, and Europe, thereby supporting Iraq's goal to become a regional logistics hub (Alaaldin, 2024). Turkish contractors are essential to this project, securing 13 new contracts worth \$624 million in 2024 (Hurriyet Daily News, 2024). Additionally, Türkiye's Turkish Cooperation and Coordination Agency (TİKA) has refurbished vital infrastructure, such as the Kayseri Bazaar in Kirkuk, the Abdul-Qadir Gilani Complex in Baghdad, and Mosul's Bridge number 4, which was damaged during the ISIS conflicts (TİKA, 2024). These initiatives align with Türkiye's overarching strategy to strengthen its influence in Iraq's post-conflict recovery and foster regional integration.

The Al-Faw Port project, with an estimated investment of \$1.2 billion, is a key element of Iraq's strategy to bolster its infrastructure and improve regional economic connectivity. Situated near the Persian Gulf, the port is engineered to handle large vessels and includes extensive logistics facilities. With a projected annual throughput of 12 million tons, the port aims to reduce transportation costs, enhance Iraq's export capabilities, and increase trade with neighboring countries, especially Türkiye. As a strategic ally, Türkiye regards this development as crucial for expanding land and maritime trade routes that connect the Gulf to Europe through Iraqi territory. (Gu, Li and Huang, 2023). Turkish Energy Minister Alparslan Bayraktar has suggested a new oil pipeline linking Iraq's Basra region to the Turkish port of Ceyhan via Haditha and Silopi, deliberately avoiding the Kurdistan Region. In conjunction with the oil route, Bayraktar unveiled plans for a corresponding gas pipeline with the capacity to transport up to 5 billion cubic meters annually, intended to supply Iraq with natural gas for electricity generation until its production capacity is fully realized. These energy corridors are anticipated to improve Iraq's export infrastructure significantly and strengthen Ankara-Baghdad energy collaboration. (Shafaq News, 2025). These energy infrastructure projects aim to diversify Iraq's export routes and reduce its reliance on Iranian supplies, particularly after the U.S. rescinded waivers for Iranian electricity imports in 2024 (Rudaw, 2025). Simultaneously, Turkish companies oversee Mosul International Airport's construction, set to open in 2025, and a 600-bed hospital in the city, both vital projects in Iraq's growing construction sector (Shafaq News, 2025).

Türkiye's economic presence in Iraq extends beyond mere physical infrastructure. In 2024, Turkish exports to Iraq reached \$13.034 billion, a 4.38% rise compared to the previous year. This trade growth is supported by enhanced transport infrastructure and TİKA-led social development projects, including the renovation of the Şakaik Preschool in Baghdad. (Shafaq News, 2025). Nonetheless, there are still several challenges. Ankara



cites security threats from PKK activities in KRG as risks to the segments of the north of the Development Road (Ozturk, 2024). Geopolitical issues, such as the inactive Iraq-Türkiye pipeline and Baghdad's \$70 million unpaid electricity debts to Ankara, further hinder bilateral cooperation (Rudaw, 2025). Despite these challenges, Türkiye's investments across multiple sectors—transport, energy, education, and healthcare—demonstrate its long-term dedication to influencing Iraq's economic and infrastructural landscape.

The reconstruction of Mosul after ISIS has focused on rehabilitating essential infrastructure, especially airports, bridges, and urban areas, to enhance connectivity and foster economic recovery. The Mosul International Airport, heavily damaged during the conflict, is currently being reconstructed at a cost of \$185 million by Turkish companies TAV Construction and 77 İnşaat. Once finished, it is anticipated to serve 2 million passengers annually by 2024 (TAV Construction, 2014; TİKA, 2019). The reconstruction plan includes extending the runway by 550 meters and modernizing terminal facilities (TAV Construction, 2014). Meanwhile, TİKA is managing the restoration of key bridges, such as the 648-meter-long Bridge number 4 over the Tigris River, which reunites Mosul's eastern and western banks, stimulating trade (Al-Taie, 2022; Rudaw, 2019). Urban revitalization initiatives, backed by the UN Development Programme (UNDP), have repaired over 12,000 homes in the Old City through the Funding Facility for Stabilization (FFS), prioritizing the establishment of water, sanitation, and electricity systems by international shelter standards (UNDP, 2021; Shafaq News, 2024).

On the economic front, Türkiye aimed to position itself as a key Eurasian trade hub with the ambitious Development Road Project. This corridor links Iraq's Grand Faw Port to Türkiye and Europe, promising to shorten shipping times between Asia and Europe by 10 days when compared to the Suez Canal (Iraqi Thoughts, 2024; Yıldırım, 2024). By 2024, Turkish exports to Iraq reached \$13 billion annually, driven mainly by demands for construction materials, machinery, and agricultural products (Salem, 2025). Türkiye has also gained significant economic benefits from Iraq's infrastructure sector by integrating its businesses into major reconstruction projects. Turkish firms like Limak and Yapi Merkezi have been instrumental in transformative initiatives such as the Development Road, which is expected to create at least 20,000 jobs for Iraqis and improve regional connectivity (Kawach, 2025; Lee, 2024; Gostoli, 2024). While, Since 2014, around 1,900 Turkish companies have invested in Iraq, primarily in the Kurdistan Region, engaging in areas like construction, agriculture, food, tourism, healthcare, and manufacturing (Kurdistan 24, 2024).

Furthermore, the Turkish government pledged \$5 billion in loans to support Iraq's reconstruction, solidifying Ankara's enduring economic influence. In this regard, Türkiye's foreign minister remarked in 2019, "Türkiye will provide around \$5 billion in loans for the reconstruction of Iraq" (Energy Terminal, 2019).

Ankara strategically leveraged infrastructure development to strengthen its influence in Iraq. This tactic was notably evident during President Erdoğan's 2024 visit



to Baghdad, specially, to target the Kurdistan Workers' Party (PKK), particularly in the areas of Mosul and Sinjar (Saeed, 2024; Altunışık and Göçer, 2025).

Furthermore, the Development Road project, backed by Gulf states, not only met economic objectives but also significantly improved Türkiye's geopolitical standing. It bolstered Ankara's position as a regional transit center, mitigated Iran's influence, and promoted closer ties with Iraq's central government (Saeed, 2024; Michalski, 2024).

From a security perspective, Türkiye's infrastructure initiatives also aimed at military goals. By 2024, Ankara had established 136 permanent military bases and built 660 kilometers of roads in KRG, effectively creating a 40-kilometer-deep "Forbidden Zone" to restrict PKK movements (Foltyn, 2025). which reportedly decreased PKK assaults by 30% while safeguarding energy routes critical to Türkiye's economy (Rudaw, 2025; Altunışık and Göçer, 2025).

In summary, Türkiye's long-term infrastructure policy in Iraq combines economic ambition, geopolitical influence, and national security. From a neorealist perspective, this strategy reflects a quest for power and security through economic and military investments, balancing rivals like Iran and China while protecting borders and energy corridors.

3. Key Events Influencing Türkiye's Economic Policy Toward Iraq

Between 2014 and 2024, Türkiye's economic policy toward Iraq and the Kurdistan Regional Government (KRG) faced significant challenges due to several regional events. These events encompassed the rise of Islamic State of Iraq and Syria (ISIS), the KRG's independent oil exports, the 2014 energy agreement, the repercussions of the 2017 KRG independence referendum, and Türkiye's military operations on its economic strategies in Iraq.

The following analysis provides a detailed examination of these significant developments.

3.1 The Influence of ISIS on Türkiye's Economic Policy in Iraq

The rise of Islamic State of Iraq and Syria ISIS in 2014 had a profound impact on Türkiye's economic policy towards Iraq and the Kurdistan Regional Government (KRG), particularly in areas like energy imports, trade patterns, and infrastructure investments. ISIS's takeover of oil-rich regions in Iraq compelled Türkiye to reformulate its energy security approach, leading to greater reliance on KRG oil exports. The capture of Mosul by ISIS in 2014 caused significant disruptions to Türkiye's energy imports from Iraq, notably affecting the vital Kirkuk-Ceyhan oil pipeline, which has been out of service since being damaged at that time (Rudaw, 2024). This pipeline was crucial, previously handling about 0.5% of the global oil supply and serving as a significant energy link between Türkiye and Iraq (Shafaq News, 2014).



The Kirkuk-Ceyhan pipeline faced "repeated attacks by ISIS militants," causing extended disruptions in crude oil deliveries to Türkiye (Shafaq News, 2014). The pipeline could handle 1.6 million barrels daily at its peak, but actual outputs were usually much lower (Al-Maleki, 2024). This section of the pipeline in Iraq became a primary target for sabotage, significantly hampering the country's export capabilities to Türkiye. By 2020, Türkiye discovered alternative methods for importing Iraqi oil, with volumes hitting a record high of 357,000 barrels per day in April 2020, marking an 85% increase compared to the previous year. Nevertheless, these alternative routes fell short of substituting the pipeline's full capacity, which had been damaged by ISIS (Fairbanks, 2020).

The ISIS insurgency significantly impacted Türkiye's non-energy trade policies, altering export-import strategies, supply chains, and economic ties with Iraq and the KRG. In 2014, ISIS's territorial growth disrupted vital overland trade routes between Türkiye and Iraq, responsible for 90% of non-energy goods such as textiles, construction materials, and consumer products (Bache, 2014; Perwaiz, 2015). Consequently, Turkish exports to central and southern Iraq plummeted by 21% in June 2014, followed by a 46% drop in July and a 27% decrease in August (Perwaiz, 2015). By the end of 2014, Iraq—once Türkiye's second-largest export market after Germany—had slipped to third place, following Germany and the UK (Bache, 2014).

Consequently, in response to these disruptions, Türkiye increased its trade with the KRG (Cagaptay, et al., 2015). By 2015, 75% of Türkiye's exports to Iraq were sent to the KRG, highlighting Erbil's importance as a stable partner amidst Iraq's fragmentation (Bache, 2014). Türkiye emphasized energy relations with the KRG, capitalizing on the KRG's oil exports through the Kirkuk-Ceyhan pipeline. Following the defeat of ISIS, Türkiye's policy formalized an "undeclared economic commonwealth" with the KRG, positioning Erbil as a crucial gateway for regional trade and energy diversification (Cagaptay, et al., 2015). By 2021, over 700 Turkish firms were active in Iraq, primarily in sectors such as construction and petrochemicals (FK, 2024). As of November 2024, around 1,900 Turkish companies were operating in the Kurdistan Region of Iraq, engaging in various industries, including construction, energy, and petrochemicals (Kurdistan24, 2024).

In the wake of ISIS's rise, Türkiye had to adjust its energy security policy due to the group's control over oil-rich areas in Iraq. This led to an increased dependence on oil exports from the Kurdistan Regional Government (KRG) instead of Iraqi imports. From 2014 to 2023, Türkiye imported about 400,000 barrels per day (bpd) of crude oil from the KRG through the Kirkuk-Ceyhan pipeline, which generated \$6 to \$8 billion each year for the KRG and reinforced Ankara's position as a pivotal energy corridor (Al-Khatteeb and Gortds, 2014; Gvenetadze and Hegazy, 2015; Ipek, 2017). Nonetheless, this arrangement conflicted with Iraq's constitutional stipulation for centralized oil sales, leading Baghdad to pursue an arbitration case that resulted in a 2023 ruling requiring Türkiye to stop KRG oil exports (Rudaw, 2024; Zoom News, 2024).

In summary, the rise of the Islamic State of Iraq and Syria (ISIS) resulted in significant financial losses for Türkiye, legal conflicts, and a persistent reliance on



partnerships with the Kurds, thereby altering the regional landscape. Consequently, trade with Iraq declined by 46%, prompting Ankara to base its strategy around the KRG. Led Türkiye to revise its economic approach towards Iraq and the Kurdistan Regional Government (KRG).

3.2 KRG's Independent Oil Exports and the 2014 Energy Agreement

From 2014 to 2024, Türkiye's economic ties with Iraq were heavily shaped by its strategic energy partnership with the Kurdistan Regional Government (KRG). In mid-2014, Ankara and Erbil signed a "50-year" oil-export agreement, permitting Kurdish oil to be transported through a newly built pipeline to Türkiye's Mediterranean port at Ceyhan (Jones, 2014). This deal came after earlier accords in 2012 aimed at constructing pipelines from KRG directly to Türkiye (Eschenbach and Tol, 2014). The pipeline construction was completed in early 2014, leading to the first Kurdish oil shipments, valued at approximately \$110 million, departing from Ceyhan on May 23, 2014 (Jones, 2014).

Türkiye justified this policy mainly for economic and security reasons. Diversifying suppliers became essential due to an energy shortfall and heavy reliance on imports. Senior analysts observed that Türkiye sought to transform itself into a regional energy hub and secure lower oil and gas prices from Iraqi Kurdistan, aiming to decrease dependence on Russia and Iran (Jones, 2014; Yilmaz-Bozkus, 2017).

A key benefit for Türkiye was the revenue from the transit of KRG's oil exports. The KRG's choice to independently export oil opened the door for Türkiye to become an essential transit hub. This collaboration enabled Türkiye to collect significant transit fees, which boosted its economy (Özdemir and Raszewski, 2016; Paasche and Mansurbeg, 2014). Moreover, the 2014 Energy Agreement led to developing new pipelines, further reinforcing Türkiye's position in the global energy market and expanding its revenue sources (Morelli & Pischedda, 2014; Nazarova, 2022).

Additionally, Türkiye's energy security was significantly bolstered by the KRG's autonomous oil exports. With limited domestic oil reserves, Türkiye has historically relied on imports to meet its energy demands. The collaboration with the KRG offered Türkiye a consistent and nearby oil supply, reducing its dependence on more distant and frequently unstable suppliers (Paasche & Mansurbeg, 2014; Mirtorabi, 2017). Furthermore, the diversification of energy sources strengthened Türkiye's energy security, making it more resilient to global market fluctuations (Mills, 2013; Ismael, 2020).

The 2014 Energy Agreement further bolstered Türkiye's geopolitical influence in the region. By backing the KRG's independent oil exports, Türkiye established itself as a significant player in the Middle East's energy sector. This move enabled Türkiye to exert more influence over the KRG and the wider region, enhancing its strategic interests (Sosnowski, 2016; Stansfield, 2013).



Although these advantages exist, Türkiye's partnership with the KRG brought about significant geopolitical difficulties. The independent oil exports of the KRG became a point of contention with the Baghdad federal government, which considered these actions a breach of Iraq's sovereignty (Özdemir & Raszewski, 2016). Türkiye's support for the KRG also worsened its relationship with Baghdad, complicating its broader regional foreign policy objectives (Mirtorabi, 2017; Tocci, 2013).

Furthermore, Türkiye's increasing dependence on the KRG for energy has sparked worries about reliance. The KRG's political and economic stability is closely linked to its interactions with Baghdad; any disturbances in this relationship could significantly affect Türkiye's energy security (Paasche & Mansurbeg, 2014; Nazarova, 2022). Additionally, internal political dynamics within the KRG, such as conflicts among different Kurdish factions, create risks for the stability of oil exports (Maghdid, 2023; Khorshid, 2014).

The economic risks tied to the partnership must be acknowledged. Although transit fees contributed positively to Türkiye's economy, the nation faced possible financial setbacks if the KRG's oil exports were interrupted. Additionally, Türkiye's investment in infrastructure to facilitate the KRG's oil exports could turn into stranded assets if political or economic conditions were to change adversely (Morelli and Pischedda, 2014; Mills, 2013).

Overall, Türkiye's engagement with the KRG from 2014 to 2024 has reshaped regional energy dynamics. By facilitating independent Kurdish oil exports through the Ceyhan pipeline, Türkiye has enhanced its energy security and positioned itself as a pivotal transit hub. However, this collaboration has strained relations with Baghdad, leading to legal disputes and a temporary halt in oil flows after the 2023 International Chamber of Commerce ruling.

3.3 The Effects of the 2017 KRG Independence Referendum on Türkiye's Economic Decisions

The independence referendum held by the Kurdistan Regional Government (KRG) in Iraq in 2017 was pivotal for Türkiye's economic policy towards Iraq. Before the referendum, Türkiye had built strong economic connections with the KRG, especially in the energy sector, viewing the semi-autonomous region as a key ally (The Guardian, 2017). In the first half of 2017, bilateral trade was around \$5 billion, with estimates suggesting it could hit \$10 billion by year-end. This economic reliance highlights the importance of the KRG as a trade partner for Türkiye (Uyanik, 2017). Nevertheless, the referendum, which resulted in over 92% of voters supporting independence, was seen by Türkiye as a direct threat to its national security and regional stability, leading to a reassessment of its economic relationships (The Guardian, 2017).

Türkiye enacted punitive economic measures aimed at the KRG in the immediate aftermath. These measures included conducting joint military exercises with Iraqi forces near the border, suspending flights to Erbil and Sulaymaniyah, and threatening to stop



oil flow through the crucial Kirkuk–Ceyhan pipeline, which is vital for KRG oil exports. On September 27, 2017, three Turkish airlines canceled their scheduled flights to Erbil and Sulaymaniyah airports, and on October 16, 2017, Turkish airspace was closed to all flights to and from the KRG. While the Habur border gate remained operational, Türkiye gave control to the Iraqi central government (Uyanik, 2017). President Erdoğan highlighted the potential economic isolation of the KRG, warning that "it will be over when we close the oil taps" (Natural Gas World, 2017). These actions illustrated Türkiye's readiness to utilize its economic power to counter Kurdish ambitions for independence.

The economic sanctions following the Kurdistan Regional Government's (KRG) independence referendum in September 2017 had considerable financial impacts on Türkiye. In this light, Roberts (2019) noted in Natural Gas News that Türkiye's oil imports from the KRG via the Kirkuk-Ceyhan pipeline saw a significant drop. While oil deliveries reached a high of 609,000 barrels per day in September 2017, they fell to 246,000 barrels per day by November 2017—a decline of nearly 60%. This significant downturn in oil imports likely resulted in financial losses for Türkiye. Since Türkiye earned substantial fees and taxes for utilizing its territory, with the KRG paying around \$25 per barrel in transit fees and other related taxes and expenses (Hussein, 2021), the diminished oil flow would have significantly affected these revenue sources.

The referendum led Türkiye to realign its economic priorities from the KRG to Baghdad. Acknowledging the significance of Iraq's territorial integrity, Türkiye aimed to enhance its relationship with the central government, resulting in agreements that mandated Ankara to export energy through the federal government (Oil and Gas Journal, 2017). In this situation, former Turkish Prime Minister Binali Yıldırım communicated with Iraqi Former Prime Minister Haidar al-Abadi on September 28, 2017, stating that Türkiye would exclusively engage with Iraq for exports and that Iraq had "support of his country for all decisions" (Oil and Gas Journal, 2017). This strategic adjustment intended to bolster Iraq's unity and limit the KRG's independent economic efforts.

This move, combined with Baghdad's military efforts to regain contested areas like Kirkuk, led to a notable reduction in the KRG's oil output and income. By November 2017, KRG oil exports fell to about 246,000 barrels daily, a decrease from before the referendum (Natural Gas World, 2018).

Türkiye also revised its energy strategy. Russia's Rosneft's participation in the KRG's oil sector introduced new dynamics, leading Türkiye to reassess its energy partnerships and pursue diversification to mitigate risks tied to regional instability (Jaffe, 2017).

Türkiye's opposition to the 2017 independence referendum by the Kurdistan Regional Government (KRG) was heavily driven by economic factors. The KRG had become a significant economic partner for Türkiye, particularly in the energy domain. By 2013, it ranked as Türkiye's third-largest export market, with trade volumes hitting \$8 billion (Cagaptay et al., 2015). Oil exports from the region, mainly moved via the Kirkuk-Ceyhan pipeline to the Ceyhan port in Türkiye, were crucial for both sides. For



the KRG, oil revenues constituted almost all of its hard currency income, while Türkiye profited through transit fees and energy supplies (Al Jazeera, 2017).

An autonomous KRG presented threats to this economic interconnection. Türkiye was concerned that this action might destabilize the region, interfere with trade, and encourage separatist feelings within its own Kurdish community. Türkiye aimed to preserve this mutually advantageous relationship (Ulutaş, 2017).

Additionally, Türkiye's dedication to Iraq's territorial integrity is tied to its economic goals. A divided Iraq may spark disputes over resource management, especially in oil-rich regions such as Kirkuk, putting Turkish investments and energy security at risk (Daily Sabah, 2017). The possibility of an independent Kurdish state further complicates Türkiye's efforts to diversify its energy sources, which depend on maintaining stable relations with Baghdad and Erbil (Ustun & Dudden, 2017).

To summarize, the 2017 KRG independence referendum had a profound impact on Türkiye's economic choices. Initially, Türkiye enjoyed a robust economic partnership with the KRG, particularly in the energy sector; however, this partnership faced difficulties following the referendum. Viewing the vote as a potential risk to regional stability and national security, Türkiye imposed economic sanctions and enhanced its relations with Baghdad. It illustrates the fragile balance Türkiye strives to maintain between its economic goals and regional geopolitical concerns.

3.4 Consequences of Türkiye's Military Operations in Iraq on its Economic Policies

From 2014 to 2024, Türkiye's economic approach to Iraq was heavily shaped by its military actions in KRG. These events affected its trade and investment policies and transformed regional economic strategies and collaborative frameworks.

Türkiye's military involvement in KRG remains a consistent element of the region's geopolitical dynamics, primarily targeting the Kurdistan Workers' Party (PKK), which Türkiye labels a terrorist group (Marcou, 2022). Since 2014, Türkiye has notably increased its military footprint in Iraq's Kurdistan Region, transitioning from short-term incursions to establishing permanent bases and exerting territorial authority (Syriac Press, 2025). The Claw Operation, initiated in May 2019, represented a pivotal change in Türkiye's strategy by focusing on cross-border actions aimed at PKK strongholds within Iraq's autonomous Kurdistan Region (Marcou, 2022). By early 2024, Türkiye had enhanced its military presence from 15 bases in 2018 to at least 136 permanent installations, effectively establishing a militarized buffer zone along the Turkish-Iraqi border that reaches as far as 40 kilometers inland in certain areas. This growth has enabled Ankara to oversee over 2,000 square kilometers of territory in KRG, constructing around 660 kilometers of military roads linking these outposts (Syriac Press, 2025).

The military actions led to various consequences, such as infrastructure damage, trade interruptions, and decreased regional investment. The creation of Turkish



military bases and recurrent cross-border operations has devastated essential infrastructure in KRG. Damage to roads, bridges, and public facilities has disrupted the daily lives of local communities and impeded economic activities. For example, airstrikes in the Amadiya region in April 2024 inflicted considerable damage to homes, farmland, and civilian infrastructure.

These operations have destroyed homes, bridges, and vital infrastructure, along with significant financial costs for the Turkish government. From January to July 2024, Türkiye carried out 1,076 attacks in Iraqi Kurdistan, which included 526 in Duhok governorate and 405 in Erbil governorate. These assaults led to the incineration of over 20,000 dunams of agricultural land, severely impacting villages such as Guharze, Balave, Barche, Sargale, Kane, and Ashke Dere in the Amedi region. In the village of Sargale, around 55% of the agricultural land was scorched by Turkish attacks. At least 602 villages face the threat of displacement, and 162 have already been displaced (CPT, 2024). Regarding the considerable financial expenses incurred by the Turkish government, Hatimoğulları from the DEM party stated, "The Turkish government reportedly spent approximately \$150 million on military operations in Iraqi Kurdistan over five months in 2024" (Medya News, 2024). The establishment of military installations has also hindered access to specific regions, affecting the provision of essential services and goods (Medya News, 2024).

Moreover, the security conditions in KRG have significantly shaped Türkiye's trade approach towards Iraq. Ongoing military actions and resulting instability have led to the closure of border crossings and trade routes, causing delays and escalating transportation costs. This has especially affected the flow of goods through the Kurdistan Region, a vital transit hub for Turkish exports to Iraq. In April 2025, the Iraqi federal government introduced new customs regulations requiring all trucks entering federal territory from the Kurdistan Region to have QR-coded seals. These shipments had to remain sealed and be delivered within 72 hours to specified checkpoints, such as the dam checkpoint between Duhok and Mosul. This policy, stemming from a March 11 directive by the Central Bank of Iraq, aimed to modernize customs practices and enhance trade compliance (Rudaw, 2025).

These changes stem from two primary reasons. Firstly, the Iraqi General Authority of Customs has switched to electronic customs declarations, eliminating paper-based submissions. This move is intended to streamline processes, improve efficiency, and comply with international standards (One World Intellectual Property, 2025). Secondly, this policy is part of Iraq's efforts to gain control over border regions and trade routes, particularly in areas where the PKK operates (New Arab, 2025). Nonetheless, the abrupt change disrupted established trade routes, severely impacting Duhok, a key trade hub, where around 20,000 workers lost their jobs due to a 90% reduction in commercial activity (Rudaw, 2025).

Furthermore, the conflict and instability have discouraged foreign and domestic investments in the region. Investors remain wary of the security risks, leading to decreased economic development initiatives. This decline has adversely affected vital sectors like construction, manufacturing, and agriculture, which are crucial for the



area's economic recovery and job creation. Key challenges for foreign investment in Iraq and the Kurdistan Region include security concerns, inadequate legal protections, and bureaucratic obstacles (Rudaw, 2024). Furthermore, corruption and a weak rule of law have eroded investor confidence, as reports highlight the sway of politically influential families over the economy and the lack of contract enforcement, prompting some international oil companies to halt their production activities in the region (Diplomatic Courier, 2024).

In summary, from 2014 to 2024, Türkiye's military operations in KRG significantly impacted the region's economic policies. Establishing military bases and engaging in cross-border activities led to infrastructure destruction, including the loss of roads, bridges, and farmland. These disruptions affected trade routes and increased transportation costs, particularly harming the Kurdistan Region, a key hub for Turkish exports.

Conclusion

From 2014 to 2024, Türkiye developed a complex economic policy toward Iraq, focusing on energy collaboration, expanding trade, enhancing infrastructure, and managing resources to bolster regional influence and safeguard national interests.

Energy collaboration played a key role in this strategy. Türkiye used its status as a transit hub, primarily through the Kirkuk–Ceyhan pipeline, to strengthen energy security and extend regional influence. Despite facing challenges like regional instability and legal conflicts, Türkiye maintained its crucial role in the regional energy landscape, demonstrating a strategic use of economic resources to achieve national power and security.

Trade relations improved, as Iraq emerged as one of Türkiye's leading export markets. Exports grew from \$4.8 billion in 2020 to \$13.034 billion in 2024, positioning Iraq as Türkiye's fourth-largest export partner. This expansion was facilitated by strategic border crossings and various memoranda of understanding, highlighting Türkiye's application of economic policy to establish influence and foster long-term collaboration in Iraq.

Turkish companies' infrastructure investments have played a crucial role in Iraq's reconstruction, particularly in areas affected by conflict. These contributions have facilitated Iraq's recovery while securing Türkiye's enduring economic presence and influence in the region, underscoring a strategy centered on power and security through targeted economic and military initiatives.

Moreover, Türkiye has broadened its imports from Iraq to include not only energy but also agricultural and industrial goods. This diversification aims to stabilize its economic policy towards Iraq and reduce reliance on the volatile energy market.

Major regional events, including the rise of ISIS, the KRG's independent oil exports, the 2017 KRG independence referendum, and Türkiye's military operations—have greatly impacted Türkiye's economic policies in Iraq. These occurrences compelled



Türkiye to modify its strategies, seeking a balance between economic priorities and geopolitical considerations.

In summary, Türkiye's economic policy regarding Iraq from 2014 to 2024 was characterized by a holistic strategy that combined energy collaboration, trade growth, infrastructure enhancement, and resource management. This strategy promoted Türkiye's economic objectives and bolstered its geopolitical presence in the region.

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سیاسهتی ئابووری تورکیا به رامبهه عیراق (2024-2014)

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پوخته

نهم توژیینه وه په سیاسهتی ئابووری تورکیا به رامبهه به عیراق له سالی ۲۰۱۴ تا ۲۰۲۴ شیده کاته وه. به روونکردنه وهی ئامانجه ستراتژییه کانی تورکیا و دهستپیشخه رییه کانی له بواری وزه، بازرگانی، ژیرخانی و ئاسایشی ناوچه که. ههروهه، توژیینه وه که به به کارهتانی چوارچیه یه کی تیوری نیورالیستی، لیکۆلینه وه له وه دهکات که چون تورکیا ئامرازه ئابوورییه کانی به کارهتیناوه بۆ بهر زکردنه وهی کاریگه رییه ناوچه یه که ی و دهسته بهر زکردنی بهر ژه وه نندییه نیشتمانیه کان.



لهوش زیاتر، شیکارییه که تیشک دهخاته سهر رۆلی تورکیا وهک ناوهندیکی ترانزیت له بواری وزه، بازرگانی و بهشاریکردنی له پرۆژهکانی ژیرخانی وهک رینگای گه شه پیدان. سهره پای ئه وهش، توپژینه وهکه به دواداجوون بو کاریگه ری رووداوه سهره کییهکانی وهک سهره له دانی دهوله تی ئیسلامی له عیراق و سوریا (داعش)، هه نارده کردنی سهره بخۆی نهوتی ههریمی کوردستان، ریفراوندومی سهره بخۆی ههریمی کوردستان له سالی 2017، و ئۆپه راسیۆنه سهره بازییهکانی تورکیا له حکومه تی ههریمی کوردستان- عیراق له سهر داپشتنی سیاسه ته ئابوورییهکانی تورکیا له عیراق دهکات. ئه نجامهکانی ئه م توپژینه وهیه جهخت له سهر ئالۆزی سیاسه ته ئابوورییهکان و رهچاوکردنی جیۆپۆله تیکی دهکاته وه، که تیروانینیکی پیشکesh دهکات بو ریبازی تورکیا بو پهروه رده کردنی وابسته تی یه کتر له گه ل عیراق له هه مان کاتدا رهچاوکردنی ئاسته نگهکانی له ناوچه که دا.

وشه سهره کییهکان: تورکیا، عیراق، حکومه تی ههریمی کوردستان، سیاسه تی ئابووری، و رووداوه ئابوورییه ئه منییهکان.

السیاسة الاقتصادية التركية تجاه العراق (2014-2024)

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الملخص

تحلل هذه الدراسة السياسة الاقتصادية لتركيا تجاه العراق خلال الفترة من 2014 إلى 2024، من خلال شرح الأهداف والمبادرات الاستراتيجية لتركيا في مجالات الطاقة والتجارة والبنية التحتية والأمن الإقليمي. وباستخدام إطار نظري نيوواقعي، تفحص الدراسة كيفية استخدام تركيا للأدوات الاقتصادية لتعزيز نفوذها الإقليمي وتأمين مصالحها الوطنية. كما تسلط التحليل الضوء على دور تركيا كمركز عبور في مجالات الطاقة والتجارة ومشاركتها في مشاريع البنية التحتية كطريق للتنمية. بالإضافة إلى ذلك، تدرس الدراسة تأثير الأحداث الرئيسية مثل صعود تنظيم الدولة الإسلامية في العراق والشام (داعش)، صادرات النفط المستقلة لإقليم كردستان، استفتاء استقلال إقليم كردستان في عام 2017، والعمليات العسكرية التركية في حكومة إقليم كردستان العراق على صنع السياسة الاقتصادية التركية في العراق. تؤكد نتائج هذه



الدراسة على تعقيد السياسات الاقتصادية والاعتبارات الجيوسياسية، وتقدم رؤى حول نهج تركيا في تعزيز الاعتماد المتبادل مع العراق مع الأخذ في الاعتبار التحديات الإقليمية.

الكلمات المفتاحية: تركيا، العراق، حكومة إقليم كردستان، السياسة الاقتصادية، والأحداث الاقتصادية الأمنية.