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By

Elem Eyryce Tepeciklioglu

M. Evren Tok

Syed Abul Basher

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Department of Economics
Aftabnagar, Plot No. A-2
Dhaka 1212, Bangladesh

☎: 09666775577 x. 209
economics@ewubd.edu
www.ewubd.edu/economics

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Authors:

- 1) **Dr. Elem Eyrice Tepeciklioğlu**, Research Assistant, Yaşar University, İzmir/Turkey.
E-mail: elem.eyrice@gmail.com. Phone: +902324115651 Fax: +902325707000.
- 2) **Dr. M. Evren Tok**, Assistant Professor and Program Coordinator, Hamad Bin Khalifa University, Doha/Qatar. E-mail: etok@hbku.edu.qa. Phone: +97433120327 Fax: +97433120327.
- 3) **Dr. Syed Basher**, Associate Professor, Department of Economics, East West University, Dhaka, Bangladesh. E-mail: syed.basher@gmail.com.
Phone: +8809666775577 ext. 140.

ABSTRACT

This paper studies the political economy of Turkey's relations with Sub-Saharan Africa (SSA) since 2002 while under the Justice and Development Party's (AKP) rule. It argues that Turkey has focused its engagement in Africa mostly on humanitarian assistance and the economy. Contextualizing Turkey's relations with SSA vis-à-vis other emerging market economies, especially the BRICS (Brazil/Russia/India/China/South Africa) bloc, provides ample insights into the nature of Turkey's engagement in SSA. While Turkey's involvement has some similarities to that of the BRICS, there are greater fundamental and structural differences from how the BRICS established their presence in SSA. These differences mostly find resonance in when we juxtapose the activism of non-governmental actors engaging in humanitarian missions and charity work with trade related economic investments and activism.

Keywords: Turkey; Sub-Saharan Africa; political economy; BRICS; trade; humanitarian assistance

Introduction

In analysing Turkey and Sub-Saharan Africa relations, the BRICS¹ group provide a suitable point of comparison. Not only they have become significant actors in the global governance architecture due to their remarkable levels of economic growth and increasing share of global

¹ The BRICS, initially the BRIC countries (South Africa was invited to join in April 2011), is a term that was coined by Jim O'Neill in 2001 and is now widely used to exemplify a shift in global economic power away from traditional developed nations.

economic activity but they have also become highly visible in SSA. For instance, exports and trade with SSA have come to represent a large and significant share of gross domestic product (GDP) in all BRICS countries. It should, of course, be noted that there remain a number of important variations among BRICS nations as well. The emergence and growth of the BRICS suggests major shifts in the global economy that have wide-ranging economic implications. One of these implications has to do with the ways in which changes in the global economic order are taking place. Consequently, BRICS growth should be thought of as part of the changing contours of the global economic order. The extent to which SSA can build a mutually beneficial relationship with emerging powers, particularly the BRICS, will undoubtedly affect its long-term socio-economic development and security.

Both emerging powers and traditional developed countries have a long presence in the continent such as European countries' competition over access to the abundant natural resources of African countries. While economic motivations are predominantly utilized to explain the contours of this competition, a more critical and balanced political economy analysis would include non-economic actors, such as governmental and non-governmental organizations (NGOs) delivering humanitarian aid and engaging in capacity building in diverse areas. Turkey's engagement with Africa is also mostly driven by economic considerations, predominantly by a quest for new export opportunities for Turkish companies; that is, the Turkish government aspires to create markets for Turkish products – while other emerging powers, such as the BRICS, concentrate both on the import or control of Africa's natural resources and on developing market opportunities. Moreover, in contrast with the BRICS with large investments in Africa's energy and mining sectors, Turkey's interest in Africa's vast natural resources has been limited to a few futile initiatives, such as energy cooperation agreements or declarations of target markets in oil-rich Angola, which never resulted in tangible economic outcomes.² Although Turkey has used trade and investment to increase its presence in Africa,³ as noted by Bacık, 'Turkey wants to legitimize its role on the world stage and make out that it is not interested in just trade and economics, but

² David Shinn, 'Turkey's Engagement in Sub-Saharan Africa: Shifting Alliances and Strategic Diversification' (2015) Chatham House, The Royal Institute of International Affairs Research Paper.

³ Stratfor, 'Turkey's Feud With Gülenists Could Upset Its Africa Policy' (19 April 2014) <<https://www.stratfor.com/sample/analysis/turkeys-feud-gülenists-could-upset-its-africa-policy>> accessed 4 August 2016.

humanitarian issues too.⁴ The current Turkish government has therefore been using humanitarian assistance as an initial point of contact with African countries.⁵

In following such a humanitarian diplomacy, Turkish government uses both official and civic and business channels. Whereas previous aid activities were mostly initiated at state level, public institutions have begun to increasingly work in collaboration with Turkish civil society organizations, most of which are religiously-motivated. Their involvement has diversified the actors involved in the foreign policy domain, helping to strengthen Turkey's soft power instruments in various regions.⁶ This humanitarian involvement has also initiated and facilitated trade relations with African countries. As business groups with interests in African countries have financed the activities of civil society organizations operating in the humanitarian domain so those organizations have laid the ground for these businesses to enter African markets. Although the government is still the dominant actor in this field, the role of NGOs in providing humanitarian aid and development assistance is increasing. The BRICS, on the other hand, have pursued somewhat different strategies regarding humanitarian aid, capacity building and development related activities. However, those initiatives of individual BRICS countries are not homogeneous. For instance, while China offers versatile collaborations through universities, and the establishment of Confucius Institutes that operate as joint ventures between Chinese and foreign universities, Russia and India's efforts have mostly relied on the BRICS Civil Society Forum, introduced as the Civil BRICS Forum under Russia's 2015 presidency.

The major findings of this study illustrate that Turkey's soft power initiatives in SSA has been an important complement to official diplomatic and developmental efforts as well as business and political interests in SSA. Furthermore, our findings also revealed that the interests of other emerging powers, such as the BRICS in SSA, civil society and NGO participation as opposed to large scale investments especially in natural resources and energy sectors, resembled an entirely different approach in contrast to Turkey's engagement in SSA. This nuance remains, as a crucial finding in the sense that scramble for African resources, similar

⁴ Alexander Christie-Miller, 'Turkey takes lead in rebuilding Somalia' *The Christian Science Monitor* (5 June 2012) <<http://www.csmonitor.com/World/Middle-East/2012/0605/Turkey-takes-lead-in-rebuilding-Somalia>> accessed 20 October 2015.

⁵ Abdirahman Ali, 'Turkey's Foray into Africa: A New Humanitarian Power?' (2011) 13 *Insight Turkey* 65.

⁶ Pinar Akpınar, 'Turkey's Peacebuilding in Somalia: The Limits of Humanitarian Diplomacy' (2013) 14 *Turkish Studies* 735; Mehmet Özkan and Birol Akgün, 'Turkey's Opening to Africa' (2010) 48 *The Journal of Modern African Studies* 525.

to the colonial period, is often associated with the BRICS involvement. Turkey's involvement, however, finds existence via various economic and social initiatives. As the paper will illustrate in more detail, each approach has its pros and cons, such as Turkey's economic impact is less due to the sectors penetrated, whereas BRICS countries have been way more successful in unleashing the market capacity and potential in SSA on a more global basis. Moreover, prospects for Turkey-SSA relations and its political economy might be affected by the current rift between the AKP and the Gülen Movement, once being an important complement in Turkey's African opening. The movement was very active in African countries through its schools, charity activities and business relations. However, the cooperation between those two parties shattered after the emergence of an alleged corruption scandal on 17-25 December, 2013.⁷ President Recep Tayyip Erdoğan even called on African leaders to close Gülen-affiliated schools, arguing that the movement uses those schools as a cover for their 'dangerous actions' and said that the government would replace those schools abroad with ministry schools.⁸ However, it will require some time and effort for the government to replace the Gülen network in African countries with government-sponsored initiatives.

Comparing Turkey and the BRICS illustrates, with few exemptions, that the BRICS' economic gains, whether actual or potential, constitute the primacy over non-governmental and civil forms of engagement. On the other hand, Turkey pursued a relatively more balanced perspective in terms of its humanitarian efforts and economic concerns. In this realm, one needs to factor in the fragilities enmeshed in Turkey's engagement in Sub-Saharan Africa. As Ozkan (2012) argued, Turkey's status as a new influential actor or just a 'passer-by' in the African context is still yet to be explored. Comparing Turkey with BRICS and then delving into Turkey's historical and contemporary focus on Africa, we argue, constitute sound starting points to bring a relatively more balanced and realistic perspective for the long term.

The article is divided into two major parts. It first discusses how Turkey's humanitarian and development assistance, provided through governmental and non-

⁷ On December 17, 2013, Turkish prosecutors brought corruption charges against key government officials and their family members. The AKP-led government blamed the Gülen movement for the corruption investigation and accused the movement of infiltrating state structures, especially the judiciary and police force, setting up a 'parallel state' and planning to bring down the government through such allegations. On July 15, 2016, a coup d'état was attempted against the government which is allegedly supported by the movement.

⁸ Hürriyet Daily News, 'Erdoğan vows to replace Gülen schools abroad with Turkish ministry schools' (22 January 2015) <<http://www.hurriyetdailynews.com/erdogan-vows-to-replace-Gülen-schools-abroad-with-turkish-ministry-schools.aspx?pageID=238&nID=77299&NewsCatID=338>> accessed 13 June 2015.

governmental channels, has contributed to the country's positive image as a new-comer in Africa. This part also compares Turkish initiatives in humanitarian domain with that of BRICS with a special focus on the religious dimension of Turkish aid and the active involvement of Turkish NGOs in contributing to the bilateral humanitarian diplomacy efforts of the government. The following part then analyzes Turkey's engagement in Africa in economic terms by comparing it with the role of BRICS countries. This section highlights that Turkey's involvement in areas of economy and finance is limited especially when compared to BRICS although there is potential for more sustained engagement.

Humanitarian diplomacy: introducing governmental and non-governmental actors

Turkey's desire to become a more active player in changing world politics and respond to the demands of Turkish business for new markets resulted in its adopting of a humanitarian diplomacy. The increasing involvement of Turkish civil society in foreign policy-making process has also contributed to Turkey's emergence as an influential actor in providing humanitarian aid⁹ and an emerging trade partner for Africa. Although humanitarian diplomacy means more than humanitarian aid,¹⁰ aid is an important element of this 'human-centered diplomacy.' For example, in 2013, Turkey became the largest donor in terms of humanitarian aid generosity. According to the Global Humanitarian Assistance Report 2014, Turkey distributed 1.6 billion USD in humanitarian aid, making it the third largest donor state after the United States and the United Kingdom.¹¹ It is also important to note that 50% of Turkey's official development assistance went to humanitarian assistance while 24.7% of Turkish development cooperation projects were related to Africa. In 2013, Turkey distributed development assistance worth 4.347 billion USD, with nearly 75% being delivered through public entities as official development assistance, 820 million USD by the private sector as direct investment, and 280 million USD by non-governmental organizations as humanitarian

⁹ Pinar Akpınar and Bülent Aras, 'Workshop Report: International Humanitarian NGOs and Emergency Aid' *Istanbul Policy Center* (Istanbul, 2015).

¹⁰ Ahmet Davutoğlu, 'Turkey's humanitarian diplomacy: objectives, challenges and prospects' (2013) 41 *Nationalities Papers: The Journal of Nationalism and Ethnicity* 865.

¹¹ Global Humanitarian Assistance, 'Global Humanitarian Assistance Report' (2014)

<<http://www.globalhumanitarianassistance.org/wp-content/uploads/2014/09/GHA-Report-2014-interactive.pdf>> accessed 1 August 2016.

assistance.¹² In 2014, Turkey provided \$383 million in development aid to Sub-Saharan African countries, which constituted one-third of Turkey's overall development assistance.¹³ On the other hand, the aid flows of BRICS to developing countries significantly lag behind other donors. When Turkey became third largest donor state in 2013, there was no BRICS country among the top 20 government contributors. China is the leading BRICS country in terms of the size and scope of foreign assistance. The amount of development assistance China provided between 2009 and 2010 corresponded to the total volume of aid provided by other BRICS countries.¹⁴

Turkey's foreign aid policy became better coordinated with the establishment of Turkish Cooperation and Coordination Agency (TIKA) in 1992. The organization later became the Turkish government's principal aid agency. TIKA was initially established to coordinate operations in Central Asia and Caucasus. In this initial phase, Asia was the priority area while Africa the least important. However, in line with government policy to improve relations with African countries, TIKA expanded its area of action to Africa in 2005. Currently, 11 of 40 program offices are located in African countries.¹⁵ TIKA now places particular importance on Africa by developing programs primarily in education, health and agriculture. Whereas only 28 of 562 TIKA projects were devoted to Africa in 2005,¹⁶ this number increased to 525 or 33.7% of its 1,800 projects in 2013.¹⁷ TIKA now operates in 28 African countries with Somalia and Ethiopia being among the major recipients.¹⁸ TIKA's activities enhanced Turkey's image and visibility in those countries. As a senior director at TIKA noted, 'Turkish businessmen follow TIKA in the Africa region. When TIKA opens up an office in one

¹² Başbakanlık Kamu Diplomasisi Koordinatörlüğü, 'Uluslararası yardımlarda "en cömert ülke" unvanını taşıyan Türkiye'nin yardım seferberliği sürüyor' (2014) <<http://kdk.gov.tr/haber/turkiyenin-dis-yaridmlari-2013/494>> accessed 11 August 2016.

¹³ Mevlüt Çavuşoğlu, '2016 Yılı Başında Dış Politikamız' (2016). T.C. Dışişleri Bakanlığı.

¹⁴ Daniel Poon, 'South-South Trade, Investment, and Aid Flows' (*The North-South Institute Policy Brief*, 2013) <<http://www.nsi-ins.ca/wp-content/uploads/2013/06/2013-South-South-Trade-Investment-and-Aid-Flows.pdf>> accessed 7 August 2016.

¹⁵ TIKA, 'Africa' (2015) <http://www.tika.gov.tr/upload/2015/Prestij/Afrika_Ing.pdf> accessed 4 August 2016.

¹⁶ TIKA, 'Faaliyet Raporu' (2005) <<http://www.TIKA.gov.tr/upload/oldpublication/faaliyet-raporu-2005.pdf>> accessed 4 August 2016.

¹⁷ TIKA, Annual Report 2013' (2013) <<http://www.tika.gov.tr/upload/publication/TIKA%20ANNUAL%20REPORT%202013.pdf>> accessed 4 August 2016.

¹⁸ TIKA, 'TIKA Afrika'nın 28 Ülkesinde Faaliyet Gösteriyor' (2015) <[http://www.tika.gov.tr/tr/haber/tika_afrika_nin_28_ulkesinde_faaliyet_gosteriyor_\(video_haber\)-15825](http://www.tika.gov.tr/tr/haber/tika_afrika_nin_28_ulkesinde_faaliyet_gosteriyor_(video_haber)-15825)> accessed 4 August 2016.

African country, Turkish Airlines starts flights to these destinations, which increases the interest of businessmen and simplifies their operations.’¹⁹

In addition to TIKA, some ministries also deliver humanitarian aid to African countries while AFAD (Prime Ministry Disaster and Emergency Management Authority) provides disaster and emergency relief, mostly in coordination with other public institutions, including the Ministry of Health and Foreign Ministry. Especially through the Ministry of Health, TIKA and Istanbul Metropolitan Municipality, the government delivers medical relief to African countries. Diyanet (Directorate of Religious Affairs) also provides humanitarian assistance to African countries. Diyanet’s role in foreign-policy making has accelerated during AKP government. In order to develop religious ties with African countries and increase Turkey’s influence in the region, Diyanet establishes mosques in some countries through its mosque-building program, provides scholarships to Muslim students from African countries and organizes meetings with Muslim religious leaders from all over Africa. In 2012, Mehmet Görmez became the first head of religious affairs to visit Africa. Religion has become a key element of Turkey’s active involvement in Africa while this religious dimension is nearly absent in BRICS’s engagement in the continent. Moreover, many Turkish civil society organizations and religious groups such as the Gülen movement, Hüdayi Foundation and Süleymancılar have also employed religion in order to legitimize their activities focusing mostly on the educational field.²⁰

Other non-governmental organizations operating in African countries include the Cansuyu Charity and Solidarity Foundation, IHH (Humanitarian Relief Foundation), Yeryüzü Doktorları (Doctors Worldwide), Kimse Yok Mu (Is Anybody There), Deniz Feneri Association (the Lighthouse Association), the Nile Foundation, Yardımeli Derneği (the Helping Hands Foundation), the Hasene Foundation, DUNYEV (the Foundation for World Orphans) and the Beşir Foundation. The former two foundations mainly deliver emergency aid activities and assistance to those suffering from conflicts, wars, crises and natural disasters. Deniz Feneri is one of the largest Turkish NGO, delivering humanitarian assistance in eighteen African countries, while Doctors Worldwide provides humanitarian and medical

¹⁹ Pınar İpek, ‘Ideas and Change in Foreign Policy Instruments: Soft Power and the Case of the Turkish International Cooperation and Development Agency’ (2015) 11 *Foreign Policy Analysis* 173.

²⁰ Mehmet Özkan, ‘Turkey’s Religious and Socio-Political Dept in Africa’ (2013) *Emerging Powers in Africa*, LSE IDEAS Special Report.

aid in ten countries from Africa. Kızılay (Turkish Red Crescent), Turkey's oldest non-governmental organization, also operates in different African countries. For example, it has been the most active Turkish NGO operating in Somalia. After the UN declared a famine in two areas within Somalia in 2011, Kızılay established the Somalia Delegation Presidency in the same year and started a relief campaign. In 2011, 60% of all NGO assistance was distributed for alleviating famine in Somalia. In 2012, Africa was still the leading regional recipient of Turkish NGO assistance with \$68.54 million, followed by the Middle East with \$42.07 million, and South and Central Asia with \$27.54 million. However, following recent developments in Syria, the Middle East replaced Africa as the major recipient of NGO assistance in 2013 when \$113.38 million was distributed to the Middle East and Syria received 40% of all NGO assistance. Aid to Africa also increased to \$93.22 million, with Somalia again being the major recipient in 2013.²¹

Turkish humanitarian assistance often comes with no strings attached. On the other hand, concessional aid or grants such as 'loans-for-oil' represents an important component of China's aid policy. It is not uncommon that Chinese government carries out a development project in exchange for access to rights to natural resources or mine. India also provides development assistance in exchange for the purchase of Indian goods.²² It should also be noted that both the Turkish government and civil society groups mostly operate on the ground and coordinate their activities with local NGOs. For example, in Somalia, Turkish NGOs coordinated with Somalian authorities and worked in collaboration with local partners to otherwise inaccessible regions. It has been therefore asserted that Turkish engagement in Somalia changed the aid landscape in the country.²³ This was in contrast with other donor countries delivering their aid through Nairobi-based international organizations. BRICS' resort to global multilateral channels with an emphasis on South-South cooperation is also opposed to Turkey's bilateral humanitarian diplomacy efforts with the increasing role of Turkish NGOs. India, for example, prefers to use multilateral channels, especially in complex

²¹ TİKA, 'Turkish Development Assistance 2012' (2013) <<http://www.tika.gov.tr/upload/oldpublication/TurkishDevelopmentAssistance2012.pdf>> accessed 4 August 2016; TİKA, 'Turkish Development Assistance 2013' (2013) <http://www.tika.gov.tr/upload/publication/KYR_FRAE_2013_uyg9.pdf> accessed 4 August 2016.

²² Poon (n 14).

²³ Saferworld, 'Turkey and Somalia: Making Aid Work for Peace' (20 March 2015) <<http://www.saferworld.org.uk/resources/view-resource/892-turkey-and-somalia-making-aid-work-for-peace>> accessed 1 August 2016.

humanitarian emergencies with only a few Indian NGOs are active abroad.²⁴ Russia is also hesitant to work with NGOs and it channels most of its humanitarian aid through multilateral humanitarian agencies.²⁵ Chinese NGOs also play only a marginal role in delivering Chinese external assistance with only a few Chinese NGOs are involved in aid projects.²⁶ On the other hand, the focus of Brazilian aid is technical assistance, especially for health and agriculture projects, and technology transfer from Brazilian institutions. South Africa's presence is mostly concentrated in Southern Africa, but its financial capacity in development assistance and humanitarian aid is not comparable to that of other BRICS countries.

As discussed before, Turkish business groups have supported the aid activities of civil society organizations to facilitate trade relations. The lobbying of Turkish companies and business associations with large foreign investments abroad also played an important role in the development of opening policy to Africa.²⁷ As Fadi Hakura from Chatham House notes, the incumbent AKP government has close ties with business associations looking for new markets, especially those representing the Anatolian Tigers.²⁸ Among the many involved in African countries, the Gülen-affiliated TUSKON (the Confederation of Businessmen and Industrialists of Turkey), founded in 2005, was once the most active. Shortly after its establishment, TUSKON started to organize annual trade bridge meetings with representatives from African countries. However, even before the recent split between the movement and the AKP government, TUSKON had to compete with other actors, such as DEIK (Foreign Economic Relations Board) having legal status, TIM (Turkish Exporters Assembly), the umbrella organization for exporting firms, and MUSIAD (Independent Industrialists and Businessmen Association). Before the struggle between the government and the Gülen-movement, the government, along with the conservative business community, represented mostly by MUSIAD, and the Gülen-inspired business community, represented mostly by

²⁴ Claudia Meier and C.S.R. Murthy, 'India's Growing Involvement in Humanitarian Assistance' (2011) 13 *GPPi Research Paper*; Gwenn Price, 'Diversity in donorship: the changing landscape of official humanitarian aid' *HPG Background Paper* (London, 2005).

²⁵ Anna Brezhneva and Daria Ukhova, 'Russia as a Humanitarian Aid Donor' *OXFAM Discussion Paper* (2013).

²⁶ Yin Sun, 'China's foreign aid reform and implications for Africa' (*Brookings*, 2015) <<http://www.brookings.edu/blogs/africa-in-focus/posts/2015/07/01-china-foreign-aid-africa-sun>> accessed 15 August 2016.

²⁷ Kemal Kirişçi, 'The transformation of Turkish foreign policy: The rise of the trading state' (2009) 40 *New Perspectives on Turkey* 29.

²⁸ Richard Lough, 'Turkey tries out soft power in Somalia' (*Reuters*, 3 July 2012) <<http://www.reuters.com/article/2012/06/03/somalia-turkey-idUSL5E8GP2LP20120603>> accessed 7 August 2016.

TUSKON, constituted a power triangle in providing humanitarian assistance.²⁹ However, following the rift between the government and the Gülen movement, MUSIAD and TIM are taking over TUSKON's role in Africa. This conflict also resulted in an increase in the activities of DEIK having now business councils in 30 African countries. DEIK was established in 1986 to coordinate the private sector's foreign economic relations while Law No. 6552, enacted on September 2014, further empowered it, giving its board full responsibility for 'managing the foreign economic relations of the Turkish private sector.'³⁰

As seen, one of the most important features of Turkey's foreign policy activism and its recent involvement in Africa is this significant participation of non-state actors in foreign policy-making. This multiplicity of actors involved in foreign policy-making towards Africa is very visible in the Turkish context. At the same time, Turkish aid, as for that of other traditional and emerging powers in Africa, serves the country's economic interests. However, as Binder notes³¹, the Turkish government still lacks an official policy on its priorities for humanitarian aid. Moreover, most state funding is now channeled to Syria. Although economic success and political transformation increased Turkey's attractiveness in various regions, including Africa, it is possible that the deteriorating economic situation and fears about the AKP government's growing authoritarianism will have a significant impact on perceptions of Turkey and its credibility in the region.

Economic trends

This section highlights Turkey's involvement with the counterparts in sub-Saharan Africa in areas of economy and finance. Turkey's role in SSA is also compared with BRICS countries, to emphasize the enormous opportunities that remain to be exploited in many parts of sub-Saharan Africa.

Turkey's trade with SSA has steadily increased between 2001 and 2015, creating a base for Turkish authority to launch measures for furthering trade between the two regions. Trade

²⁹ Andrea Binder, 'The Shape and Sustainability of Turkey's Booming Humanitarian Assistance' (2014) *The Graduate Institute, Geneva, Articles and Debates* 5.2.

³⁰ DEIK, 'DEIK Info' <<http://en.deik.org.tr/287/DeikHakkinda.html>> accessed 4 March 2016.

³¹ Binder (n 29).

between Turkey and SSA climbed from around US\$1 billion in 2001 to over US\$5 billion in 2015. Exports constitute the important driver of economic relationship between the two regions. As a share of its total exports, Turkey more than doubled its exports to SSA from 0.97 percent in 2001 to 2.24 percent in 2015 (Table 1). On the other hand, despite the rise in Turkey's imports from SSA in value terms, as a share of its total imports, Turkey's imports from SSA have fallen from 1.70 percent in 2001 to about 1 percent in 2015 (Table 2). These figures may appear disappointing partly because they fall short of government's growth targets.³²

Insert Table 1 and 2

Compared to BRICS countries (and barring Russia), Turkey's exports and imports with SSA however appear small. Needless to say, among the BRICS nations, South Africa is the most significant player in SSA due to its geographical proximity and political backgrounds with the 48 SSA countries. The other four BRIC countries have their own drivers for engaging with SSA. Trade between India and Africa dates back thousands of years when Indian traders sailed to the east coast of Africa in search of raw materials and intermediate goods.³³ Brazil too has a strong historical and cultural links with Africa due to its colonial influence on the continent from the sixteenth to the early nineteenth century.³⁴ Whereas, China's concerns in Africa are more than accessing the latter's minerals, China is the most significant business partner among emerging counties.³⁵ Though a relative newcomer, Russia's engagement in Africa is growing across various spheres ranging from direct investments to peace-keeping.³⁶ In comparison, Turkey's growing relationship with Africa has been aided by a series of public initiatives such as Turkey's joining to the African Development Bank, signing bilateral investment treaties with 12 SSA countries, and most importantly opening up new embassies in African continent.³⁷

³² Shinn (n 2).

³³ KPMG, 'India and Africa – Collaboration for Growth' (28 October 2015).

³⁴ World Bank, 'Bridging the Atlantic: Brazil and Sub-Saharan Africa, South-South Partnering for Growth' (Washington DC., 2012).

³⁵ The Economist, 'More than minerals' (23 March 2013) <<http://www.economist.com/news/middle-east-and-africa/21574012-chinese-trade-africa-keeps-growing-fears-neocolonialism-are-overdone-more>> accessed 15 September 2016.

³⁶ Alexandra Arkhangelskaya and Vlademir Shubin, 'Is Russia Back? Realities of Russian Engagement in Africa' *London School of Economics and Political Science* (London, 2013).

³⁷ Mehmet Özkan, 'Turkey's rising role in Africa' (2010) 9 *Turkish Policy Quarterly* 93; Shinn (n 2).

In the aftermath of the Great Recession of 2008-2010, world trade growth has been remarkably sluggish.³⁸ It is therefore instructive to look at Turkey's growth of exports and imports with SSA, compared with the BRICS countries. Table 3 reports the annual average growth rate (AAGR) of trade with SSA before and after the financial crisis. Whereas Turkey posted the highest level of export growth with SSA before the crisis, export growth declined sharply than other BRICS countries (except Brazil) after the global financial crisis. A similar pattern can be seen in Turkey's imports from SSA, which slowed remarkably after the crisis. These figures in part reflect a broader pattern of Turkey's slower total trade growth with the rest of the world due to weak growth in trading partners (particularly Europe) and increasing unit labor cost at home.³⁹ Further, a real effective exchange rate overvaluation—thanks to the positive inflation differential with trading partners—contributed to Turkey's loss of external competitiveness in recent years.⁴⁰

Insert Table 3, 4 and 5

Table 4 reports exports and imports by Turkey with SSA in 20 broad product categories in 2015. To save space, figures are not shown for other years and for BRICS countries, but they are discussed here to facilitate comparison. As can be seen, consumer products made up the bulk (around 43%) of Turkey's exports to SSA in 2015 followed by intermediate goods (33%) and capital goods (21%). Occasionally, though, exports of intermediate products stay on top of Turkey's exports to SSA. Exports of consumer goods to SSA also appear as the major product exported by India (62%), China (48%), and South Africa (39%). Whereas, both raw materials and vegetable are major export items of Russia to SSA. Looking at Turkey's imports from SSA, the product categories are much less diversified than the other way around. Raw material is the single largest import category averaging 56% of total imports from SSA during 2015. As a result, Turkey ran a raw material trade deficit with SSA of \$1.1 billion in 2015. Similar to Turkey, the BRICS nations also import raw-material heavily from SSA with Brazil (75%) topping the list followed by India (69%), South Africa (67%), China (55%), and Russia (54%).

³⁸ Christina Constantinescu, Aiditya Mattoo and Michele Ruta, 'Slow trade' (2014) 51 *Finance & Development* 39.

³⁹ IMF, 'Turkey: 2016 Article IV Consultation' (Country Report No. 16/104, 2016).

⁴⁰ IMF, 'Turkey: 2014 Article IV Consultation' (Country Report No. 14/329, 2014).

In recent years, Africa's attractiveness as an investment destination has become more visible to corporations and countries alike. In 2015, foreign direct investment in Africa increased by 16%.⁴¹ Compared to BRICS countries, the amount of Turkish investment in Africa is modest (Table 4 and 5). Interestingly, although India and China have invested in far greater amounts, they have not necessarily created many jobs—a gap that is being filled by Turkey. According to African Investment Report (2015)⁴², Turkey ranks as the top investing country in Africa by job creation generating 16,593 jobs in 2014 against 10,811 jobs created by China and 6,193 jobs by India. However, investment flows into Africa remain volatile due to a combination of external factors such as economic slowdown in emerging economies and the weak recovery in the European countries, declining oil and metal prices, and domestic factors like terrorist activity and deteriorating security in some Sahel countries.

Over the last decade, many African governments relied on market mechanisms such as bond issuance to finance domestic debt. At the same time, foreign investors are increasingly willing to invest more in SSA frontier markets due to a comparatively higher return and improved credit ratings of African countries, among other push and pull factors that contributed to the surge in private portfolio capital flows.⁴³ Unlike long-term investments such as FDI, data on portfolio flows is scant and often reported as missing. Nevertheless, based on the CPIS dataset of the IMF, the accumulated portfolio flows to SSA over the 2001-2015 period reached \$315 million by India,⁴⁴ followed by Russia (\$240 million) and Brazil (\$210 million). Data for China was not available. Compared to these figures, Turkey only invested \$8 million in SSA frontier markets over the same period.

A final area of cooperation between Turkey and SSA is labor movement. Over the past years, Turkey is being transformed from a 'transit country' for sub-Saharan Africans on their way to Europe to a 'new destination' for sub-Saharan Africans migrants.⁴⁵ This represents a radical break with the past where all sub-Saharan Africans would aspire to migrate to Europe by all

⁴¹ OECD, *African Economic Outlook* (2016).

⁴² fDiIntelligence, *Africa Investment Report* (London, 2015).

⁴³ IMF, 'Managing Volatile Capital Flows: Experiences and Lessons for Sub-Saharan African Frontier Markets' (African Department 14/01, 2014).

⁴⁴ The figures for India are based on 2004-2015 period.

⁴⁵ Helene Marie-Lou De Clerck, 'Europe is no longer the only 'El Dorado' for sub-Saharan Africans: the case of contemporary Senegalese migration to Turkey' (2015) 4 *Migration and Development* 272; Joris Schapendonk, 'African passage through Istanbul' in Martin van der Velde and Ton van Naerssen (eds), *Mobility and Migration Choices: Thresholds to Crossing Borders* (Routledge, 2016); Mahir Şaul, 'A different Kargo: Sub-Saharan migrants in Istanbul and African Commerce' (2014) 43 *Urban Anthropology* 143.

means following the legacy of colonization.⁴⁶ Based on in-depth interviews with SSA migrants in and around Istanbul, Şaul (2014), De Clerck (2015) and Schapendonk (2015) present new evidence that complement the findings of earlier studies illustrating the growing aspirations of African migrants towards Turkey as one of many possible destinations, thanks to both the increased economic vitality in many regions of Africa and Turkey's changing relationship with SSA countries. Needless to say, recent regional events in the Middle Eastern countries have further contributed to Turkey's increasing role as a shock absorber of unfettered migration flows.

To sum up, being at the crossroads between Asia and Europe, Turkey is well placed to take advantage of SSA's rapid growth in recent years, while SSA has much to gain from intensifying its ties with Turkey's rise as a global economic power. Turkey is well placed for various reasons, but predominantly the cultural rapprochement between the Muslim countries (or Muslim majority) in SSA and Turkey's Presidency has been yielding closer links, which in different mechanisms pave the way to cultivate business interests. Still, proper evaluation of this relatively new commercial relationship between Turkey and SSA falls short because available evidence is sparse to confidently judge their future economic promise based on the past. Yet the evidence presented here is positive, suggesting the potential for more sustained and longer-term engagement. For longer terms engagements, although it is beyond the scope of this study, as a policy proposal, we believe that given Turkey's strategic partnership with Qatar and other Gulf Cooperation Council (GCC) states (Kingdom of Saudi Arabia, Oman, the United Arab Emirates, Kuwait, and Bahrain), could enhance in the future triangular cooperation mechanisms between SSA, Turkey and the GCC. Given the historical and contemporary connections between GCC and the East African states, such as Ethiopia, Eritrea, Sudan, Mozambique and Djibouti, there are various opportunities that could be utilized by this triangular engagement.

Conclusion

It is debatable whether either the BRICS or Turkey are benevolent actors and the saviors of SSA from its historically established dependencies. In very broad terms, the BRICS' interest has been more divergent than Turkey's. Turkish interest in SSA is often identified with both a

⁴⁶ De Clerck (n 45).

humanitarian perspective and the continent's commercial potential.⁴⁷ However, the actual impact of Turkey's humanitarian efforts has been relatively limited in terms of both the local impact on capacity building and economic collaboration emerging from the various forms of solidarity cultivated between African countries and Turkey. Both the BRICS and Turkey have explicitly addressed the African growth model and underlined the structural problems of African countries. It has to be noted that both models have their pros and cons for SSA. While BRICS involvement is more geared towards extractive industries and natural resource investments in general, Turkey's approach has been embroiled with social and political concerns and expectations. While BRICS offer diverse economic opportunities with a significant long term social and environmental cost, Turkey's approach posits itself as a more balanced perspective.

A crucial area of divergence between the BRICS and Turkey concerns the sectorial composition of their vested interests. BRICS countries have a wide range of interests, predominantly in extractive industries, oil/gas reserves and other minerals, and water/land resources, whereas Turkish interests have been limited to manufacturing and services, with few exceptions. For instance, the most visible presence of the BRICS in Africa has undoubtedly been in minerals. Since 2000, China in particular has established a series of resource-backed deals, in which dams, power plants and other infrastructure projects are exchanged for rights to oil, iron ore, copper, cobalt, and other mineral resources. On the contrary, Turkey's position was defined by ex-Prime Minister Erdoğan during a speech to the Parliament of Gabon in January 2013: 'Africa belongs to Africans, we are not here for your gold.'⁴⁸ Although Turkey is now more determined in investing Africa's energy industry, Turkey's interest in African energy sector is limited to a few initiatives including the signing of energy cooperation agreements with a number of African countries and agreements to construct power stations in a few African countries which did not translate into large scale projects or natural resource related concessions. Finally, Turkey's stance did not involve deals with SSA countries similar to those of the BRICs, particularly Chinese 'resource diplomacy'. Another major difference between BRICS' and Turkish engagement in SSA is visible in the humanitarian field. BRICS' resort to global multilateral channels is opposed to Turkey's

⁴⁷ Fehim Taştekin, 'Turkey's Africa Policies Blend Hard and Soft Power' (*Al-Monitor*, 6 April 2014) <<http://www.al-monitor.com/pulse/originals/2014/04/turkey-africa-humanitarian-business-strategicpolicy.html>> accessed 10 June 2015.

⁴⁸ Turkish Ministry of Foreign Affairs, 'Turkey-Africa: Solidarity and Partnership' <http://www.mfa.gov.tr/turkey_africa_-solidarity-and-partnership.en.mfa> accessed 14 April 2016.

bilateral humanitarian diplomacy efforts. Moreover, the religious dimension of Turkish aid, provided especially through Diyanet and religiously-motivated NGOs also differ from the involvement of BRICS operating bilaterally or through multilateral organizations.

This study has revealed that Turkish humanitarian aid and developmental support in SSA has been an important complement to official diplomatic and commercial efforts to further the country's political and economic interests. It has to be underlined that until recently, Turkish civil society and humanitarian NGOs have acted in tandem with governmental support rather than their roles directly resulting from the government policy. Furthermore, this study also compared the footprints of other emerging powers, such as the BRICS in SSA, civil society and NGO participation as opposed to large scale investments especially in natural resources and energy sectors reveal that as opposed to the official rhetoric that characterizes Turkey's SSA engagement as a coherent one.

Table 1. Exports to SSA by BRICS and Turkey (% of total exports)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Avg. share (2001-15)	CAGR (2001-15)
Brazil	2.02	2.46	2.51	2.61	3.23	3.40	3.57	3.47	3.60	2.35	2.55	2.61	2.46	2.16	2.09	2.74	108.37
China	1.55	1.40	1.57	1.51	1.56	1.79	2.02	2.40	2.60	2.63	2.81	2.98	3.02	3.32	3.39	2.30	121.58
India	4.56	4.57	4.58	4.82	4.90	6.02	6.67	6.09	5.68	6.10	6.07	7.36	7.90	8.69	7.63	6.11	116.81
Russia	0.22	0.36	0.23	0.23	0.18	0.19	0.18	0.21	0.30	0.13	0.26	0.27	0.28	0.33	0.56	0.26	117.01
South Africa	12.84	13.10	13.30	12.49	13.18	13.78	14.05	16.40	18.56	24.94	14.43	27.06	27.82	29.72	28.94	18.71	113.62
Turkey	0.97	0.98	1.02	1.05	1.25	1.44	1.59	2.20	2.36	1.72	2.39	2.22	2.37	2.20	2.24	1.73	117.02

Notes: Authors' calculations based on Direction of Trade Statistics, IMF. CAGR refers to compound annual growth rate. Numbers are reported in percentage points.

Table 2. Imports from SSA by BRICS and Turkey (% of total imports)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Avg. share (2001-15)	CAGR (2001-15)
Brazil	3.66	3.09	3.79	6.10	4.61	5.98	6.13	5.94	4.53	4.34	4.71	4.21	5.13	5.53	3.52	4.75	107.50
China	1.40	1.36	1.56	2.28	2.52	3.03	2.95	3.90	3.22	3.49	4.36	5.44	5.45	5.55	3.16	3.31	119.68
India	3.91	4.53	3.72	3.09	2.76	5.39	5.97	6.27	6.56	7.30	7.02	7.16	6.93	7.82	7.94	5.76	120.48
Russia	0.84	0.88	0.78	0.80	0.69	0.54	0.48	0.46	0.63	0.60	0.50	0.48	0.51	0.53	0.74	0.63	110.34
South Africa	2.64	3.31	3.04	4.18	3.71	4.80	6.19	7.35	7.00	9.24	7.38	11.05	11.02	12.49	11.74	7.01	120.15
Turkey	1.70	1.06	1.17	1.58	1.56	1.80	1.85	1.23	1.52	1.13	1.41	1.10	0.99	1.02	0.99	1.34	107.42

Notes: Authors' calculations based on Direction of Trade Statistics, IMF. CAGR refers to compound annual growth rate. Numbers are reported in percentage points.

Table 3. Average annual growth rate (AAGR) of trade with SSA (%)

	Exports to SSA		Imports from SSA	
	Pre-crisis (2001-2008)	Post-crisis (2009-2015)	Pre-crisis (2001-2008)	Post-crisis (2009-2015)
Brazil	28.78	-5.90	32.87	-0.21
China	35.89	13.19	46.37	9.49
India	28.29	12.06	42.36	10.69
Russia	31.85	20.91	22.09	2.36
South Africa	18.28	22.68	41.72	11.17
Turkey	38.78	4.22	25.23	0.11

Notes: Authors' calculations based on Direction of Trade Statistics, IMF. Numbers are reported in percentage points.

Table 4. Product exports and imports by Turkey with Sub-Saharan Africa in 2015

	Exports to SSA		Imports from SSA	
	US\$ (mil.)	Export product share (%)	US\$ (mil.)	Import product share (%)
All products	3393.79	100	2067.65	100
Capital goods	707.04	20.83	155.06	7.5
Consumer goods	1443.85	42.54	92.76	4.49
Intermediate goods	1128.56	33.25	651.38	31.5
Raw materials	64.52	1.9	1167.82	56.48
Animal	36.58	1.08	12.39	0.6
Chemicals	153.26	4.52	40.95	1.98
Food products	433.26	12.77	518.81	25.09
Footwear	12.29	0.36	0.09	0
Fuels	169.63	5	442.35	21.39
Hides and skins	2.08	0.06	22.89	1.11
Machinery and Electronics	549.05	16.18	124.83	6.04
Metals	713.30	21.02	347.70	16.82
Minerals	172.92	5.1	54.42	2.63
Miscellaneous	162.20	4.78	5.14	0.25
Plastic and rubber	206.49	6.08	10.73	0.52
Stone and glass	57.62	1.7	57.52	2.78
Textiles and clothing	171.76	5.06	106.87	5.17
Transportation	196.75	5.8	69.59	3.37
Vegetable	210.08	6.19	204.60	9.9
Wood	146.45	4.32	48.70	2.36

Source: World Integrated Trade Solution (WITS) Database, World Bank.

Table 5. Total FDI inflows in Africa (US\$ billion)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Total
Brazil	2.9	0.0	0.0	0.0	1.8	2.2	0.3	0.8	1.2	0.0	0.0	0.1	0.3	9.7
China	6.0	0.2	0.9	2.4	1.8	9.1	2.9	0.8	1.8	1.8	0.3	6.1	2.3	36.5
India	0.9	4.0	1.1	1.9	1.5	4.3	2.8	4.6	7.9	7.5	5.3	1.1	1.0	43.9
Russia	0.6	0.8	0.1	0.1	0.6	2.6	1.1	0.1	0.7	0.1	1.7	0.1	4.0	12.6
South Africa	1.8	1.8	0.3	1.0	0.9	1.7	6.8	3.4	4.7	1.3	5.6	4.8	2.0	36.2
Turkey	0.1	0.1	0.0	0.0	0.1	0.0	0.6	0.6	0.1	1.3	2.3	0.4	0.2	5.9

Notes: African Economic Outlook, 2016.