

A POLISH-ROMANIAN-TURKISH TRIANGLE AND THE BLACK SEA REGION – A NEW DRIVING FORCE OF REGIONAL INTEGRATION?

In recent years, bilateral cooperation between Poland, Romania, and Turkey has increased significantly. Moreover, a cooperation process between these three countries in a trilateral format was launched, though it remains still in the early stages. One of the key pillars of the trilateral cooperation process between Ankara, Bucharest, and Warsaw should be a common engagement with Georgia, Moldova, and Ukraine. The latter could serve as a locomotive of cooperation between the Eastern Partnership countries. The cooperation of the Polish-Romanian-Turkish triangle with the aforementioned three Eastern Partnership countries could increase their leverage in the Black Sea region through ‘pooling and sharing’ and would bring an added value to their engagement. In a long term perspective, a possible establishment of very close cooperation between the two triangles (Poland-Turkey-Romania and Georgia-Moldova-Ukraine) could be a game changer in the region and the most efficient instrument to strengthen the cooperation between the West and the EaP countries which is of crucial importance for the future of the region.

Key words: Poland, Romania, Turkey, Black Sea, Eastern Partnership (EaP), Russia, European Union (EU), Ukraine, Georgia, Moldova

Adam Balcer

Main thesis

1. In 2014, the Black Sea region became an arena of unprecedented Russian aggressive policy against Georgia, Moldova and, above all, Ukraine. Paradoxically, Russian policy strengthened the European vocation of Georgia, Moldova, and Ukraine. As a result, the Eastern Partnership (EaP) countries split finally into two groups: the states interested in EU integration (Georgia, Moldova, Ukraine) and the states not interested in that process due to a variety of factors (Armenia, Belarus, Azerbaijan). In response to these trends, an increase of Russian pressure on Chisinau, Kiev, and Tbilisi, particularly

in the economic and social fields can be expected in the coming years. Therefore, the process of Georgia, Moldova, and Ukraine’s integration with the EU will soon face its moment of truth.

2. In recent years, bilateral cooperation between Poland, Romania, and Turkey increased significantly. Moreover, a cooperation process between these three countries in a trilateral format was launched, though it remains still in the early stages. It should be enhanced particularly in the economic and social fields. One of the key pillars of the trilateral cooperation process between Ankara, Bucharest, and Warsaw should be a common engagement

with Georgia, Moldova, and Ukraine.

3. Taking into consideration Russia's aggressive policies, Georgia, Moldova, and Ukraine need more than ever the support of their main partners. Meanwhile, Poland, Romania, and Turkey are key stakeholders in Georgia, Moldova, and Ukraine, with each of the latter countries having its own priority partner from the former group of countries (Turkey-Georgia, Moldova-Romania, Poland-Ukraine).
4. The deepening of the Polish-Romanian-Turkish triangle and its successful engagement in the Black Sea region depends, in particular, on Turkey's approach to this initiative because of its strong ties with Georgia, Moldova, and Ukraine and due to its huge potential. Meanwhile, the potential of Ukraine and its close economic and social ties with Poland, Turkey, Georgia, and Moldova make Kiev the key partner for the Polish-Romanian-Turkish triangle among the Eastern Partnership countries.

Introduction

The Black Sea region due to the Euromaidan revolution in Kiev and Russian aggression against Ukraine brought about in 2014 tremendous tectonic shifts. Last year Moscow also exerted enormous pressure on Moldova and Georgia.¹ As a result, the Black Sea region will never be the same. These negative developments should not eclipse the positive trends. Georgia, Moldova, and Ukraine signed Association Agreements with the EU. This in itself must be perceived as the crossing of the Rubicon by these countries while Armenia, Azerbaijan, and Belarus were left on the other bank. Ukraine confirmed its European vocation by electing the most pro-European parliament in its history. Moreover, the societal support for the accession of Ukraine to the EU and NATO increased considerably. In Moldova, the pro-European coalition was reelected, though in another configuration, less committed to the reforms. The EU abolished its visa regime for citizens of Moldova. While Georgia experienced a serious internal political crisis in 2014, it remains an EaP country with an impressively high, in fact the highest ever, support for EU membership.

It seems that Russia because of serious economic problems in the years to come will refrain from subsequent military interventions and will focus on placing the three countries under even greater economic and social pressure. However, the continued recession

in Russia has created a window of opportunity for the EaP countries to decrease substantially their economic and social ties with Moscow. This decoupling of their economies is a precondition for their successful structural economic reforms and integration with the EU.²

Russia, through its bullying and aggression undermined the possibility of the further development of multilateral regional cooperation in the hitherto existing formats (for instance, the Organization of Black Sea Economic Cooperation). In the radically new geopolitical context, the Black Sea region needs new, innovative and unconventional formats of cooperation. The article proposes as a new initiative an enhancement of the Poland-Romania-Turkey triangle in what can become a game changer in the region. These three countries are significant stakeholders in Georgia, Moldova, and Ukraine while, simultaneously, they regard the Black Sea region as a strategic area in their foreign policies. They are the largest EU or associated to the EU economies bordering the Eastern Partnership countries. Despite a slowdown in comparison to the pre-crisis period, they have solid projections for growth (3-3.5% on average) for the coming years.³ The triangle could conceivably evolve into a more robust multilateral regional entente which will be based on cooperation between two triangles: Poland-Romania-Turkey and Georgia-Moldova-Ukraine, respectively.

The Polish-Romanian-Turkish triangle *in statu nascendi*

Poland, Romania, and Turkey substantially intensified their bilateral political and economic cooperation in recent years. One of the main reasons for the intensification apart from the economic potential was their common interest in the Black Sea region. Turkey signed Strategic Partnership agreements with Poland and Romania in 2009 and 2011, respectively. Poland signed such an agreement with Romania in 2009 and established a bilateral presidential consultation committee with Romania.⁴ The committee is supposed to meet every year and include officials from the Presidential Chancelleries, the Ministries of Foreign Affairs and the Ministries of Defense. At the beginning of the 1990s, Poland established such a committee with Turkey.

Bilateral contacts between Poland and Romania have been regular, but should be more intensive.⁵ The window of opportunity for a new opening and

substantial enhancement of Polish-Romanian relations created a common stance on the Ukrainian crisis. In 2014, Poland and Turkey commemorated the 600th anniversary of the establishment of diplomatic relations between the two countries. This anniversary was an incentive for the organization of many cultural events (exhibitions, concerts, conferences, publications) in both countries and an unprecedented intensification of bilateral high level visits.⁶ An impressive deepening of Polish-Turkish relations occurred recently in the educational sector.⁷ Currently, the key issue for Poland and Turkey should be to 'keep fire burning' in order to avoid losing the momentum when 'the party' is over.

The institutional framework for economic bilateral cooperation between Poland, Romania and Turkey has also intensified in recent years. For instance, in 2009, the Turkish Ministry of Economy placed Poland in the group of the fifteen priority markets for 2010-2011. Until 2013, Poland was 'reelected' to this group as the only EU member state. In 2013, Romania was assigned this status together with Poland for the 2014-2015 period. On the other hand, in 2012, Poland recognized Turkey as one of seven prospective non-European markets.⁸ Turkey is the main trade partner of Poland in this group.⁹ The mutual treatment of Turkey, Poland, and Romania as priority markets stems from already relatively developed trade ties between these countries. The trade between Poland and Romania and Turkey is at a similar level. According to Turkish data, in 2014 the trade turnover between Turkey and Romania exceeded 6 billion USD. Meanwhile, the Turkish trade volume with Poland approached 5.5 billion USD and Polish-Romanian trade reached almost 5 billion USD. Turkey is the biggest non-EU market for Polish exporters after Russia, the US, and Ukraine. For Romanian exporters, the importance of Turkey is even bigger because the Turkish market occupies the first place among non-EU destinations. Therefore, Poland and Romania perceive Turkey as one of the most important destinations for Polish and Romanian exports within the framework of their strategies of the diversification of their economies. The foundation for more comprehensive economic cooperation between these three countries, thus, already exists, though the potential remains still to a large degree untapped. Romania and Poland are the top destinations in the EU for Turkish construction companies and Romania has already attracted noticeable FDI flows from Poland and Turkey.¹⁰

A new and very promising development was the establishment of trilateral cooperation between Poland, Romania, and Turkey. In May 2012, during the Chicago NATO Summit, Polish, Romanian, and Turkish Ministers of Foreign Affairs established a regular mechanism for consultations on security issues. The meetings of Deputy Ministers are held twice a year. From the very beginning, apart from missile and smart defense, the talks also focused on issues related to the Black Sea region such as NATO enlargement, the frozen conflicts, and the future of the conventional weapons system in Europe. The recent meetings confirmed that certain divergences of opinion exist between Poland and Romania on the one end and with Turkey on the other. While Poland and Romania are the main proponents of a tough course against Russia's aggression in Ukraine; Turkey has not supported the EU sanctions imposed on Russia. However, this divergence should not be perceived as 'the end of the world'. Turkey has not refrained from cooperation with the EaP countries. On the contrary, Ankara intensified its political and economic ties with Georgia, Moldova, and Ukraine after the Russian annexation of Crimea. In September 2014, Turkey signed a Free Trade Agreement (FTA) with Moldova. This FTA is the most comprehensive agreement ever signed by Ankara with another country. It can be assumed that the Turkish-Moldovan FTA is similar to the Turkish-Georgian FTA signed in 2007 and will thus boost considerably trade between Turkey and Moldova. In August 2014 Turkey agreed to hold two meetings a year in trilateral format of the defense ministers with Azerbaijan and Georgia; to organize regularly joint military drills, workshops and conferences; and to establish a tripartite format for military education and cooperation in the technical sphere. In autumn 2014, Ankara also intensified negotiations on an FTA with Ukraine. Also, the President of Turkey, Rexhep Tayyip Erdogan, visited Kiev in March 2015. In sum, Poland and Romania, cannot count on Turkey with regard to their tough approach towards Russia but they can deepen substantially their cooperation with Turkey in the Black Sea region.

As previously mentioned, Georgia, Moldova, and Ukraine desperately need an intensification of the process of economic integration with the West. Therefore, the next stage in the development of the Polish-Romanian-Turkish triangle should be the establishment of multilateral economic cooperation in the Black Sea region. The agreement on cooperation

signed between the Polish Chamber of Commerce (KIG) and The Union of Chambers and Commodity Exchanges of Turkey (TOBB) in March 2014, during the visit of the President of Poland to Turkey, can serve as a source of inspiration for the Polish-Romanian-Turkish triangle. The agreement foresees the common Polish-Turkish entry into the markets of third countries. Both organisations declared that they will, *inter alia*, focus on the post-Soviet countries. Nonetheless, the audit of stakes and assets of Poland, Romania, and Turkey in the aforementioned EaP countries should be conducted as a precondition to prepare an efficient strategy for the triangle.

The relations of Poland, Turkey and Romania with the Eastern Partnership countries - strong and weak points

Currently Poland, Romania, and Turkey engage mostly separately with the EaP countries in the Black Sea region. Each has managed to gain the status of top partner for one of the EaP countries. Poland is a particularly important partner for Ukraine; Romania plays the role of main stakeholder in Moldova; while Turkey has a key leverage in Georgia. However, Turkey also possesses relatively developed political and economic relations with Moldova and Ukraine, although, these could be substantially more robust. The weakest chains in the process of economic cooperation between Poland, Romania, and Turkey and the EaP are the negligible economic ties between Ukraine and Romania and between Poland and Georgia. Nonetheless, it should be admitted that Poland, Romania, and Turkey are currently trying to deepen their economic, political, and social relations with all three EaP countries.

Poland

Poland is a unique case among the larger EU member states because it treats the Eastern Partnership area – particularly Ukraine – as the number one priority in its foreign policy agenda; after all, Poland was the originator of the Eastern Partnership, the most important EU initiative directed towards the Black Sea region. In fact, Poland is after Germany the most important EU stakeholder in the Black Sea region.

Poland, after Russia and Germany, is the country with the largest leverage in Ukraine. Since 1991, no other EU member state has had such intensive diplomatic relations with Ukraine as Poland. Poland is the most important advocate in the EU for Ukraine's

membership in the Union in the long term.¹¹ Poland is one of Ukraine's most important partners with regard to military cooperation (i.e., common Polish-Lithuanian-Ukrainian brigade; the Visegrad EU Battlegroup). Poland is the greatest supporter of Ukraine's NATO bid. Therefore, no other EU country has given such a firm support to the Euromaidan than Poland has.

After Russia and Germany, Poland is Ukraine's most important economic partner (trade, investments, tourism, remittances). In 2014, Poland's share in Ukraine's trade exceeded 5%. Poland is the third largest trading partner of Ukraine, and second to Germany among EU member states. Indeed, Poland's share in Ukraine's trade volume is not substantially smaller than the German one. Poland is also a relatively important foreign direct investor in Ukraine.¹² Poland is also an important market for periodic labour immigration from Ukraine.¹³ However, only a small number of Ukrainian migrants remain in Poland permanently or receive Polish citizenship.

Poland has become the top destination for Ukrainian students studying abroad in recent years. In the 2013-2014 academic year, more than 15,000 Ukrainians received scholarships at Polish universities. Their number has increased sevenfold since 2005.¹⁴ Contacts between the Polish and Ukrainian societies are particularly strong. More Ukrainians visit Poland than any other country. Polish tourists to Ukraine constitute the most numerous group from the EU and one of the biggest groups overall.¹⁵ Poland is a country enjoying the highest rate of sympathy in Ukraine. On the other hand, the Poles are a nation with the strongest support for Ukraine's accession to NATO and the EU among the biggest EU and NATO member states. Despite these strong assets, Poland's engagement with Ukraine still needs to be substantially improved. Before the Euromaidan, Poland did not occupy a place in top ten donors of Official Development Assistance (ODA) to Ukraine (2011-2013). Unfortunately, after the Euromaidan, although Poland's ODA contribution increased, it remains at a very low level (for instance, a favorable loan of 100 million euro for 10 years). Polish authorities also did not manage to intensify political cooperation with Ukraine (too few high level visits). Warsaw did not undertake any serious and substantial economic or social flagship projects which would increase its leverage in Ukraine.¹⁶ The legacy of the difficult history between the two countries still fosters negative mutual prejudices among substantial parts of Ukrainian and, particularly, Polish society.

Unfortunately, according to opinion polls, the great majority of Poles believes that Poland should not provide Ukraine with a larger financial support.

After Romania, Poland is the most consistent advocate of bringing Moldova closer to the EU. Poland is one of the few EU member states that have established in recent years, robust diplomatic relations with Moldova. Until the end of 2014, a Pole was the deputy head of the European Union Border Assistance Mission to Moldova and Ukraine (EUBAM). Poles constitute the most numerous contingent in this EU mission (approximately 15%). Poland is also a relatively important trade partner for Moldova (including Transnistria).¹⁷ In 2014, Poland's share in the trade turnover of Moldova (excluding Transnistria) approached 3%. In August 2014, Poland signed with Moldova an agreement on the loan of 100 million euro under the favorable conditions. Nevertheless, taking into consideration their geographic proximity, the level of Polish-Moldovan trade is still below par; while, Polish direct investments in Moldova are limited. Poland also plays a modest role in terms of soft power (i.e., limited number of scholarships).

Poland is the most important European supporter of Georgia's membership in the EU and among the European members of NATO. Poland stands out, in comparison to other EU member states, in terms of the frequency of its political contacts with Georgia.¹⁸ In 2011-2013, a Polish general headed the European Union Monitoring Mission in Georgia (EUMM), while Poles constitute almost 10% of the contingent (one of the largest deployments). In April 2015, Poland signed with Georgia a memorandum of understanding to set up the Tbilisi Conference. This will be a platform run by Poland on behalf of Georgia. It will be used to share Polish experiences in European integration and reforms. It will involve a series of thematic meetings, seminars, conferences and working visits. On the other hand, the economic ties between Georgia and Poland are very modest (trade, investment, remittances).¹⁹ Unfortunately, Poland also plays a very negligible role as a provider of scholarships and official development aid to Georgia.

Romania

Romania's accession to NATO and the EU in 2004 and 2007 respectively played a key role in the development of the EU policy towards the Black Sea region. However, Romania did not succeed in

promoting the policies directed solely to the Black Sea region (Black Sea Strategy, Black Sea Synergy); a difficult undertaking considering their weaknesses and Russia's opposition to these.

However, no EU country possesses as large an influence in any of the Eastern Partnership countries as Romania does in Moldova. Romania's strongest asset is the cultural and social dimension.²⁰ More than 400,000 Moldovans have Romanian citizenship (accounting for about a fourth of ethnic Moldovans). Their number is steadily growing. For ethnic Moldovans, Romania is the most popular destination for study trips. In 2014, Romania granted scholarships to more than 5,000 students from Moldova. After Russia, Romania is the most important economic partner of Moldova and the number one partner from the EU. Indeed, in 2014 its share in the trade balance of Moldova (excluding Transnistria) exceeded 15% and is almost identical to that of Russia's. Romania also occupies the second position among donor countries (excluding organizations) providing development aid to Moldova. Romania is one of the most important investors in Moldova (accounting for approximately 7% of cumulative foreign direct investment). In the years to come, Romania will become through the development of an interconnector with Moldova, the guarantor of the latter's energy security. The entry into force of the Deep and Comprehensive Free Trade Area (DCFTA) between Moldova and the EU will likely make Romania the most important economic partner of Moldova. On the other hand, very close ties between Moldova and Romania sometimes are a liability for Bucharest. The vast majority of Romanians and Romanian political elite support the incorporation of Moldova into their country. They consider Moldovans to be Romanians. In contrast, Moldova is a country inhabited by many ethnic minorities and many Moldovans are not interested to be subsumed into Romania. As a result, Romania attracts but, to a lesser degree, also pushes away Moldova.

Romania is also a relatively important stakeholder in Georgia. Within both NATO and the EU, Romania belongs to the group of supporters of Georgia's Euro-Atlantic aspirations. Romania contributes substantially to Georgia's stability. It has the largest contingent in the EUMM (almost 15% of its members). After Germany, Romania is Georgia's most important EU trade partner. In 2014, it accounted for almost 4% of Georgia's trade turnover. However, its direct

investment in Georgia and official development aid are negligible; while, in general, Georgians do not study at Romanian universities.

The Achilles heel of Romania's engagement in the Black Sea region is its rather poor relations with Ukraine which need to be improved. While Bucharest formally supports Ukraine's membership in the EU and NATO; several contentious issues between two countries act as an impediment.²¹ Fortunately, the Euromaidan opened up a window of opportunity for rapprochement between Kiev and Bucharest which began immediately after the establishment of the new democratic government in Kiev. Mutual ignorance and stereotypes rooted in history constitute a challenge for the Romanian-Ukrainian rapprochement process.²² However, there exist, at the same time, very strong social and historical foundations for enhancing relations between the two countries.²³ The common historical space has favored the intermingling of the two nations. Romanians and Romanian-speaking Moldovans are the largest minority group in Ukraine after the Russians. According to the 2001 census, more than 400,000 Romanians live in Ukraine today. On the other hand, close to 450,000 Ukrainians live in Moldova. Ukrainians constitute the largest minority in Moldova, amounting to more than 10% of the population. In fact, the rather poor political relations between Romania and Ukraine suggest that the potential for economic cooperation between the two countries has remained largely untapped. The border between the two countries is over 530 km long and about 100 km longer than the Polish-Ukrainian border. However, in 2014, Romanian exports to Ukraine were the same as those to Moldova, although its economy is many times smaller than the Ukrainian one. Also, the volume of trade between Romania and Ukraine was only slightly bigger than that between Ukraine and Lithuania. The number of visits undertaken by Ukrainians to Romania in 2013 was almost nine times smaller than the number of crossings of the Polish-Ukrainian border by Ukrainian citizens. Nevertheless, this situation will most probably change in 2015 because of a small border traffic agreement signed between the two countries in October 2014. Ukraine had earlier signed such agreements with Hungary, Poland, and Slovakia. It foresees that people who live up to 50 km from the border zone will be able to visit a neighboring country without obtaining a visa. This agreement is the most important expression of rapprochement between Romania and Ukraine that has taken place since the Euromaidan protests.

Turkey

In the Black Sea region, Turkey is decidedly the most important player, after Russia; but its position is much weaker than Russia's on the northern shores of the Black Sea (Moldova, Ukraine).²⁴ Despite Turkey's reluctance to openly challenge Russia in the region, the positions of the two countries on the future of the region do not overlap. In contrast to Russia, Turkey supports the membership of Georgia, Moldova, and Ukraine in the EU and NATO.

Georgia is a country where Turkey's influence is the greatest. Turkish influence is based on its strong economic position, very frequent people to people contacts, and close military cooperation.²⁵ Turkey is Georgia's most important trade partner with its share in the Georgian trade balance approaching 17%. Since the Rose Revolution, its share in the inflow of FDI to Georgia has totaled almost 10%. Turkey plays a significant role in the Georgian construction sector where construction contracts that were completed by Turkish companies had reached nearly 3.5 billion USD by the end of 2014. In effect, Turkey's position in Georgia's economy is stronger than that of Russia. Turkey plays a particularly important role in the development of infrastructure (Baku-Tbilisi-Kars railway, highways, airports) and in the energy sector (Baku-Tbilisi-Erzurum gas pipeline, TANAP gas pipeline, Baku-Tbilisi-Ceyhan oil pipeline). In sum, Turkey's dynamic involvement in Georgia's economy is the most important insurance policy against Russia's efforts to subdue the latter in this sphere.

Turks represent the largest group of foreigners that most often visit Georgia; while, after Russia, Turkey is the main travel destination for Georgians. According to the Turkish Ministry of Culture and Tourism, Georgians visited Turkey 1.75 million times in 2014 (it should be noted that Georgia's population does not exceed 5 million). On the other hand, despite intensive people to people contacts with the Turks, Georgian society feels a social distance towards them. This stems from their significant religious differences and the high level of conservatism in both societies.²⁶ Turkey's relations with Georgia, in the education sphere are definitely below par while Turkey does not play a significant role in the ODA received by Georgia.²⁷

Turkey relations with Moldova and Ukraine are not negligible although they could be much improved. These have substantially intensified in recent years.

In 2011, Turkey and Ukraine established a strategic partnership and signed a number of important economic agreements (i.e., the agreement on a direct ferry and rail transport connection). Kiev and Ankara also created a High Level Strategic Cooperation Council whose most recent meeting was held in March 2015 in Kiev.²⁸ Turkey aspires to play the role of protector of the Crimean Tatars who, despite Russia's occupation of Crimea, maintain a strong loyalty towards Ukraine.²⁹ Turkey's share in the trade balance of Ukraine exceeds 4% and is relatively close to Poland's share.³⁰ Its direct investments in Ukraine are limited, though the Turkish telecom company Turkcell controls nearly 20% of the telecommunication sector. In March 2015, it won a huge tender to build the 3G network in Ukraine.

Unfortunately, Turkish soft power (in terms of scholarships, ODA, tourism) is rather limited in Ukraine.³¹ By default, the mutual knowledge about both societies, in spite of a strong historic legacy, is shallow, particularly in Turkey. Moreover, Turkey's reluctance to counterbalance Russia in the Black Sea region decreases its attractiveness in the eyes of Ukrainian elite and society.

In the case of Moldova, Turkey's position is mainly of a commercial nature as it is one of the most important trading partners of Moldova. In 2014, Turkey's share in Moldova's trade turnover approached 6% while its direct investments are relatively huge. They account for around 5% of Moldova's FDI. Nonetheless, Turkey's soft power (ODA, scholarships) is modest. In the case of Gagauzia,³² Turkey constitutes the most serious alternative to Russia (via scholarships, schools, development aid), though its leverage is substantially weaker than Moscow's.

Conclusions: Two triangles - from Warsaw to Tbilisi, from Kiev to Ankara

The bilateral ties between Poland-Romania-Turkey and Georgia-Moldova-Ukraine are sufficiently developed that they should be expanded to a multilateral format. The basis for such a cooperative format has been established in recent years. In 2012, Turkey launched regular trilateral meetings of the Ministers of Foreign Affairs with Georgia and Azerbaijan. In 2014, the same format was established between the Ministers of Defense. This triangular relationship probably served as a source of inspiration for other multilateral initiatives by Poland and Romania in the region. In fact, in October 2014, a first trilateral meeting of the Prime Ministers of Moldova, Romania,

and Ukraine took place in Kiev. In November 2014, the Polish and Ukrainian Presidents together visited Chisinau, where they met the Moldovan President and Prime Minister, and issued a common declaration supporting Moldova's European bid. The Polish and Romanian initiatives are of an *ad hoc* character and, thus, require some sort of institutionalization. However, the most efficient scenario would be the establishment of cooperation between the two triangles namely: Poland-Romania-Turkey on one side and Georgia-Moldova and Ukraine, on the other. With regard to the EaP countries, Ukraine, due of its potential and leverage in Moldova and Georgia, should play the role of the driving force behind the second triangle.³³

The cooperation of the Polish-Romanian-Turkish triangle with the above mentioned three Eastern Partnership countries would increase their leverage in the region through 'pooling and sharing' and would bring an added value to their engagement. In a long term perspective, a possible establishment of very close cooperation between the two triangles (Poland-Turkey-Romania and Georgia-Moldova-Ukraine) could be a game changer in the region and the most efficient instrument to strengthen the cooperation between the West and the EaP countries which is of crucial importance for the future of the region.

A recipe for success

1. The EaP countries desperately need the modernization and the construction of infrastructure (railways, highways, sea and air ports, river routes, etc.) which will increase radically the commercial and social ties between themselves and with Poland, Romania, and Turkey, as well as, generally, between the EaP countries and the West. The development of such infrastructure through Ukraine and the Black Sea based on the North-South axis are particularly important because it will boost trade relations between Poland, Romania, and Turkey. The engine of the huge infrastructure projects (flagship projects) should be joint-ventures created by companies from Poland, Romania, and Turkey in cooperation with their EaP partners and supported by the governments of all interested countries.
2. The engagement of the Polish-Romanian-Turkish triangle with the EaP countries should be based on a geographic division of labor. Each member of the triangle has, by default, its *spécialité de la maison*, as a leading nation in the EaP country where it has the largest influence (Poland in Ukraine, Romania in Moldova, and Turkey in Georgia).

3. The Polish-Romanian-Turkish triangle should particularly put its emphasis on cooperation with Georgia, Moldova, and Ukraine in the agricultural sector including the food industry as Poland, Romania, and Turkey are among the largest food producers in Europe. Meanwhile, the EaP countries possess a huge, although mostly untapped agricultural potential. Besides agriculture, the energy sector should also be a priority for the Polish-Romanian-Turkish triangle's involvement in the region. The cooperation in this field should be as comprehensive as possible to include investment, research, and infrastructure.
4. Despite their strong position in the region, the performances of Poland, Romania, and Turkey need to be enhanced. All three countries should increase their development assistance and number of scholarships allocated to the EaP countries. Likewise, FDI flows in the region originating from these countries should be considerably improved.
5. Poland's and Romania's engagement in the region also require a self-critical evaluation. Poland should finally recognize that the Black Sea region constitutes the center of the Eastern Partnership space and Romania has to rediscover its historic ties with Ukraine, which is one of the countries for which Romanians feel the most affinity.
6. The success of the Polish-Romanian-Turkish triangle depends to a large degree on the position of Turkey, the most important pole of the triangle. In case of further authoritarian slide in Turkey and a serious crisis in EU-Turkish relations the whole idea will become wishful thinking and, eventually, a beautiful dream. The second main impediment would be closer cooperation between Turkey and Russia thereby alienating Poland, Romania, and Ukraine. It can only be hoped that Turkey will read properly the economic trends and conclude that closer ties with Russia could be a blind alley for the Turkish economy.³⁴
2. Georgia reformed radically its economy and society and reduced Russia's economic leverage by developing economic relations with other countries, in particular with Turkey, after the Rose Revolution of 2004. It could play a role as a source of inspiration for Ukraine and Moldova.
3. The grave economic crisis in Ukraine makes cooperation with such dynamic neighbors as Poland, Romania, and Turkey of particular importance for Kiev.
4. Besides Lithuania, Poland established such committees only with the Black Sea countries of Georgia, Ukraine, and Turkey.
5. Between 2005 and 2014, Polish Prime Ministers visited Romania three times. In contrast, during the same period, they visited Hungary five times. In 2010-2014, the Polish President visited Romania once and Hungary four times.
6. Between 2013 and 2014, the Polish President and Deputy Prime Minister visited Turkey and the Prime Minister of Turkey visited Poland twice.
7. For instance, Poland has become the most popular destination for Turkish students within the framework of the Erasmus program (almost 25% of all Turkish Erasmus students visiting European universities) and, at the same time, the Turkish students constituted the largest group of Erasmus students in Polish universities (25% of all students participating in that program in Poland).
8. In contrast to the EU and many EU member states, including France and Germany, the Polish Statistical Office treats Turkey as a non-European market.
9. Unfortunately Polish exports to Turkey in contrast to Turkish exports to Poland have been slightly decreasing every year since 2011.
10. Romania enjoys the status of the most attractive market for the Turkish construction companies operating in the EU. Until the end of 2014, they undertook construction contracts valued at nearly 6.2 billion USD. Their value was larger than the value of all combined construction contracts realized by Turkish companies in the entire EU. Poland occupies the third position (1.2 billion USD) in the Turkish construction investment stocks just behind Bulgaria. However, Poland will surpass Bulgaria in 2015 due to the completion of the second line of the Warsaw subway realized by a Turkish-Italian-Polish consortium. It is the biggest urban construction project in modern Poland.
11. Poland's support for Ukraine's Euro-Atlantic aspirations is best exemplified by the fact that the heads of the NATO and EU representative offices in Ukraine are Polish.
12. According to the Ukrainian statistical office, until 1 April 2015, Poland had invested almost 780 million USD in

Endnotes

- 1 In 2014, Transnistria, a Russian puppet entity, withdrew from peace negotiations with Moldova. Gagauzia, an autonomous region in Moldova inhabited by Turkic Gagauz people, voted in an illegal referendum for integration with the Eurasian Union. Russia annexed Abkhazia, a separatist region in Georgia.

- Ukraine. The share of Polish direct investment in total FDI stocks approaches 2%. Poland's actual share in Ukraine's investment balance is greater (around 4%), as a part of the investments from Cyprus and the British Virgin Islands, constitutes partly reinvested capital from Ukraine.
- 13 According to Ukrainian data, from among the 1.2 million Ukrainians that worked abroad in 2013, around 15% went to Poland (second place after Russia)
 - 14 Ukraine is home to the largest number of Polish language courses (fifteen) at the university level supported by the Polish government after Russia. However, conversational level knowledge of Polish in Ukraine is limited, excluding the Western part of the country.
 - 15 According to the Ukrainian statistical office, in 2013, more than 1.3 million visits were made by Polish citizens to Ukraine. Poles accounted for around 5% of foreign tourists' arrivals in Ukraine. According to the same statistics, in 2013, almost 7 million trips were made by Ukrainians to Poland. They constituted almost 30% of all trips abroad made by Ukrainians.
 - 16 Poland created a team of experts advising Ukraine's government on the reform of local administration but its activity is low profile.
 - 17 According to the Polish statistical office, Moldova's export to Poland increased almost two times in 2014. A huge part of this import originated probably from Transnistria. In the period between January and September 2014, the trade turnover between Poland and Moldova reached 360 million USD and was substantially larger than the combined trade volume between Poland and the South Caucasus states.
 - 18 Poland maintained especially strong contact with the South Caucasus during the presidency of Lech Kaczyński (2005-2010), who visited Georgia seven times. Poland also established a presidential committee with Georgia.
 - 19 Polish direct investment in Georgia is almost non-existent. It is particularly astonishing taking into account the level of good bilateral political relations, the strong sympathy existing between both societies, and the favorable conditions for doing business in Georgia. In comparison, the Czech Republic's FDI flows to Georgia, after the Rose Revolution in 2004, approach 5%.
 - 20 Ethnic Moldovans speak Romanian. For centuries the territory of Republic of Moldova had been a part of the Princedom of Moldova whose largest part lies in Romania. In the Republic of Moldova, the identification with Romania is particularly strong among the young and educated people. Moreover, it has strengthened in recent years. In December 2013, the Moldovan Constitutional Court ruled that the official language of Moldova should be called Romanian.
 - 21 The most contentious issues are: the Ukrainian plans to re-open the Bystroye channel between the Black Sea and the Danube; the status of minorities, especially that of Romanians in Ukraine; and differing interpretations of the verdict which was favorable to Romania by the International Court of Justice in the dispute over Snake Island in the Black Sea.
 - 22 For instance, the Romanian modern national identity was built in the 19th century on a staunch rejection of historical ties with the Orthodox Eastern Slavs, often treated as a homogenous mass. This process was made easier by the fact that since the establishment of the Romanian state in 1861, the political elite has been clearly dominated by the Balkan-directed Wallachia, followed by Transylvania looking to Central Europe. The legacy of this situation is a limited expert knowledge on Ukraine (for example, few experts speak Russian or Ukrainian).
 - 23 A personification of the very close cultural links between Moldova and Ukraine is the seventeenth-century Patriarch of Kyiv, Peter Mohyla, originating from a princely family from Moldova, who has made a huge contribution to the culture of both countries (academies, printing houses).
 - 24 Turkey possesses a certain importance at the local level in individual countries. For example, Turkey plays a significant role as a main distributor of scholarships for Turkic and Muslim minority students from the region (Crimean Tatars, Gagauzians, Adjarians, and Georgian Azerbaijanis). Turkey is also a key donor of development aid to Gagauzia (Moldova), Crimea (Tatars), as well as Adjaria, which are regions inhabited by Muslims and/or Turkic peoples.
 - 25 Turkey's importance to Georgia is most clearly illustrated by Ankara's role in the development of the Georgian armed forces (equipment, training, the development of military facilities, joint maneuvers). During the very difficult period of 2008-2009 for Georgia (tensions and war with Russia), together with Ukraine, Turkey was the main supplier of equipment to the Georgian armed forces (nearly 40% of all purchases).
 - 26 According to the Caucasus Barometer, only 23% of Georgians approved of Georgian women marrying Turks while 74% disapproved. However, they did not have a problem to cooperate economically with Turks. 72% of Georgians approved of doing business with Turks while only 24% disapproved. Other surveys suggest that a chance for Turkey to improve its image in Georgia is to use wisely Azeris living in Georgia as its advocates in that country. The attitude of ordinary Georgians towards Azeris is generally positive.
 - 27 In the 2012-2013 academic year, less than five hundred students from Georgia studied in Turkey. A Turkish private

university operates in Georgia but the ruling party in Turkey perceives its founders, the Gulen movement, as its number one enemy since the end of 2013.

- 28 Turkey has established such councils with 16 countries but not all meet regularly.
- 29 Their community living in Turkey is larger than in Crimea. It, thus, has a certain influence in public life.
- 30 According to the Turkish statistical office, Turkey's share in Ukraine's trade turnover surpasses 5%.
- 31 Very few ethnic Ukrainian students study in Turkey though more than 1,000 Turks study in Ukraine. Ukrainians are, after Russians and Georgians, the nation from the Black Sea which most frequently visit Turkey, but they travel to Turkey less often than Russian tourists do. Proportionally to Russian tourists, there should be at least twice as many Ukrainian tourists visiting Turkey in 2014.
- 32 Gagauzia is an autonomous region inhabited by Gagauzians, an Orthodox Christian nation that speaks a language that is very similar to Turkish.
- 33 Ukraine is an important trade partner for Georgia and Moldova. In 2013, Ukraine accounted for almost 8% of Georgia's turnover. In 2014, its share decreased to 6% due to the economic crisis. In 2013, Ukraine's share in Moldova's trade turnover (excluding Transnistria) exceeded 10%, though it slumped to below 10% in 2014.
- 34 According to IMF projections, in 2015 and 2016, Russia will be hit by a recession. The medium term perspectives of Russia's economy also look gloomy (1.5% growth). By comparison, according to the IMF forecast, Poland and Romania will experience the fastest pace of growth among the largest economies in Europe in the years to come (3-3.5% on average). Even in 2014, Turkey's exports to Poland and Romania accounted for 90% of Turkish exports to Russia, though the latter's economy is almost three times larger (in terms of nominal GDP) than the economies of Poland and Romania combined. In the period of January-March 2015, Turkish exports to Poland and Romania surpassed exports to Russia by 25%.

About the Author

Adam Balcer is a lecturer at the Centre for East European Studies, the University of Warsaw, and program director of the Conference “Polish Eastern Policy” organized by the Jan Nowak-Jeziorański College of Eastern Europe. In 2001-2009, he was an expert at the Department of Central Europe (Balkan section) and in 2005-2009, he was Project Leader of “Turkey after the launch of EU accession negotiations – foreign policy and internal affairs” at the Centre for Eastern Studies, Warsaw. Between 2010 and 2013, he was program director at demosEUROPA Centre for European Strategy, Warsaw. In 2010-2012, he was a member of task force in the National Security Council of the President of Poland; while he also served as a member of the Advisory Group to the Committee of Foreign Relations of the Polish Parliament. In 2013-2014, he was an adviser at the Presidential Expert Program. He graduated from the Centre for East European Studies (MA) and the Institute of Ethnology and Cultural Anthropology, the University of Warsaw. He has published numerous articles and reports on the Balkans, Turkey and the CIS countries. He is co-author of the book *Polska na globalnej szachownicy* (Poland on the global chessboard). He also lectures at the Polish Institute of Diplomacy and the Diplomatic Academy, Warsaw.

About the CIES

The Center for International and European Studies (CIES) at Kadir Has University was established in 2004 as the Center for European Union Studies to study Turkey’s European Union accession process. Since September 2010, CIES has been undergoing a major transformation by widening its focus in order to pursue applied, policy-oriented research and to promote debate on the most pressing geostrategic issues of the region.

Its areas of research and interaction include EU institutions and policies (such as enlargement, neighbourhood policies and CFSP/CSDP), cross-cutting horizontal issues such as regional cooperation, global governance, and security, inter alia with a geographical focus on the Black Sea Region (including the Caucasus), the Mediterranean, Southeastern Europe, Turkish-Greek relations, and transatlantic relations.

About the Black Sea Trust for Regional Cooperation

The Black Sea Trust for Regional Cooperation (BST), a project of the German Marshall Fund of the United States promotes regional cooperation and good governance in the Wider Black Sea region; accountable, transparent, and open governments; strong, effective civic sectors; and independent and professional media. To respond to the rapid shifts in the region, BST staff regularly consult with regional experts and aim to sharpen the program’s grantmaking strategy in order to more effectively achieve the Trust’s goals. Taking into account the complexity and diversity of the region, BST priorities are revised regularly and adjusted to respond to the region’s changing needs. Adjustments are made in consultation with the BST Advisory Board, the German Marshall Fund’s network of offices and internal expertise, and in coordination with other donors active in the region.

About the *Neighbourhood Policy Paper* series

The *Neighbourhood Policy Paper* series is meant to provide the policy, research and professional communities with expert input on many of the important issues and challenges facing, in particular, the Eastern neighborhood of the European Union today as they are written by relevant experts. The analysis provided along with the relevant policy recommendations strives to be independent and not representative of any one particular perspective or policy. Most of these papers are also translated into Russian so that they are accessible to the Russian speaking world in an attempt to enlarge the scope of the dialogue and input on neighborhood-related issues. The key priority is to maintain the focus of the policy debate on the Black Sea Region and the wider region including its interaction with the Mediterranean South.

Center for International and European Studies (CIES)

Kadir Has University
Kadir Has Caddesi
Cibali / Istanbul 34083
Turkey

Tel: +90 212 533 65 32, ext. 4608

Fax: +90 212 631 91 50

Email: cies@khas.edu.tr

Website: <http://cies.khas.edu.tr>

Director: Dimitrios Triantaphyllou

The Black Sea Trust for Regional Cooperation

The German Marshall Fund of the United States
B-dul Primaverii nr. 50
Corp 6 “Casa Mica”
Sector 1
Bucharest, Romania

Tel: +40 21 314 16 28

Fax: +40 21 319 32 74

E-mail: BlackSeaTrust@gmfus.org

Website: <http://www.gmfus.org/cs/blacksea>

Director: Alina Inayeh

ISBN 978-605-9792-00-4