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Turkey's President Erdoğan Is Losing Ground at Home

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Introduction and summary

Despite a recent bump in his approval rating—an uptick shared by many leaders around the world during the coronavirus crisis—a substantial body of evidence shows that Turkey’s President Recep Tayyip Erdoğan is losing ground domestically under the pressure of a cratering economy, an ongoing refugee crisis, and his long-term incumbency. Young Turkish conservatives and some less ideological right-wing nationalists—crucial constituencies that Erdoğan cannot afford to lose—are unhappy with the state of the country and are increasingly considering potential conservative alternatives or successors.

Undoubtedly, President Erdoğan remains the undisputed leader of the governing Justice and Development Party (AKP) and the Turkish right in general, but waning enthusiasm presents a real threat to his continued dominance. Young voters may desert him in sufficient numbers to allow the opposition to defeat him in the next election, now scheduled for 2023, but genuine conservative alternatives are unlikely to materialize unless and until he loses an election or otherwise withdraws from the scene. President Erdoğan’s dominance of the AKP apparatus, patronage structure, and the Turkish judiciary is a powerful disincentive to conservative challengers but may not be enough to deliver another electoral victory. Still, Erdoğan’s weakening domestic position has important ramifications short of vulnerability in eventual elections. If his weakness proves durable, it may encourage conservative challengers and breakaway factions. More importantly, it raises the likelihood of greater repression at home and more aggressive action abroad. In the past, President Erdoğan has often lashed out when faced with threats to his grip on power, likely aiming to prompt a rally-around-the-flag response from a highly nationalist electorate and to justify greater censorship and political repression of his domestic rivals.¹ Furthermore, it is likely that core tenets of Erdoğan’s brand of populist nationalism will outlast him even if he is defeated. Finally, this assessment is predicated on the uncertain assumption—somewhat bolstered by President Erdoğan’s acceptance of setbacks in the 2019 nationwide local elections, albeit after a second vote in Istanbul—that he would accept a hypothetical electoral defeat and not reject or dispute the results.

Political currents on the Turkish right wing may seem academic—far removed from the challenges facing the United States and Europe. In fact, these trends will help shape events across several issues crucial to both U.S. and European interests. Turkey is of critical strategic importance and exercises influence across a range of issues important to the West. A NATO ally, Turkey hosts important Western military installations and is weighing defense procurement decisions that will have huge repercussions for the alliance. Ankara has increasingly asserted itself—often militarily—across the Middle East and the Eastern Mediterranean, deploying combat troops in Syria, Iraq, and Libya and supporting proxy groups across the region. Turkey hosts some 4 million refugees within its borders and controls swathes of northern Syria that are home to more than 3 million civilians, many of whom are displaced from other parts of the country.² Together with its position as the gateway to Greece and the European Union, Turkey is therefore an essential player in managing the refugee crisis.

Ankara is also engaged in tense disputes over maritime boundaries and energy exploration with Greece, Cyprus, and Egypt that are wrapped up in the Libyan war and could easily spiral into open conflict. Yet Turkey is a highly centralized state ruled by one man whose circle of trusted advisers is small and suspicious of Western intentions; there are few institutional checks on President Erdogan's actions. Erdogan's core interest is regime security and his ambition to assert Turkey as a powerful global actor under his rule. He has repeatedly instrumentalized both brutal domestic repression at home and military adventurism abroad to these ends, particularly when threatened politically. His domestic political challenges are therefore inseparable from crucial matters of regional—and global—interest.

A dominant—but diverse—conservative bloc

Starting in 2017, the Center for American Progress began conducting nationwide polling and focus groups with the Turkish polling firm Metropoll to examine Turkish nationalism in general and the country’s dominant right wing in particular.³ Unsurprisingly, the polling and focus groups have shown that the constituencies underpinning the governing bloc are not monolithic. The AKP alone is quite diverse, despite the way it is often portrayed. And beyond the core AKP, President Erdoğan has channeled an array of religious conservative, Islamist, nativist, center-right, and hardcore nationalist currents that together hold the balance of power in Turkey. The war in neighboring Syria, the influx of millions of refugees into Turkey, the resumption of the conflict with the Kurdistan Workers’ Party (PKK), and the July 2016 coup attempt have strengthened these forces—stoking nationalism and nativism and, in tactical electoral terms, convincing Erdoğan that he could replace lost Kurdish votes with hardcore nationalists.

President Erdoğan and the AKP have engaged in severe political repression, including stifling dissent, muzzling the media, jailing thousands of political opponents, and unfairly mobilizing the tools of the state to hold on to power. But Erdoğan and the AKP still feel the need for a modicum of democratic legitimacy—they must still win elections, no matter how unfair those elections may be.⁴ Therefore, the fissures on the right and the views of conservative voters are not just academic; they are crucial to understanding the midterm trajectory of Turkish politics and, consequently, the parameters of U.S. and European relations with Turkey.

CAP’s earlier research, discussed in the report “Turkey’s New Nationalism,” provides context for the current state of play on the Turkish right and the feelings of young conservatives.⁵ The earlier polling and focus groups synthesized in that report showed that most AKP voters are not political Islamists, though a meaningful minority are, and a large bloc are not even religiously conservative. The research found that nativism and jingoism—fueled by the war in Syria, the PKK conflict, and the refugee issue—are more powerful forces than religious conservatism. The AKP’s traditional core base of religious conservatives includes a small segment of what are best termed “compassionate Islamists” from which many party activists are drawn; this faction wants Turkey to lead and protect the ummah—or community of Muslims, in Syria,

for example—and to expand religious education. But this vocal base cuts against the anti-cosmopolitan and anti-refugee impulses of many on the Turkish right—the so-called Turkey Firsters—who want the refugees gone and oppose other Islamist priorities such as expanding religious education.⁶

To balance these countervailing forces, President Erdoğan has emphasized the areas where these factions agree. Foreign policy and Turkish nationalism have been at the core of this pitch, one based on harshly anti-Kurdish policies and an assertive, confrontational approach toward the West, particularly the United States. Both the “compassionate Islamists” and the “Turkey Firsters” share a deep antipathy toward the West and the conviction that the United States seeks to weaken Turkey. Indeed, CAP’s research captured this right-wing consolidation well before it became visible—and formalized—in the Cumhur İttifakı electoral coalition between the AKP and the ultranationalist National Movement Party (MHP).⁷ The research also showed that, alongside the ideological currents of the “compassionate Islamists” and the “Turkey Firsters,” there is a broad spectrum of less ideological but largely conservative—or at least tradition-minded—Turks who have voted AKP but who have wavered in that support as the economy slows and local corruption has become more visible. Finally, the research uncovered deep discontent among young voters, including young AKP supporters, with the direction of the country.

Waning support among young conservatives

It is with these last two groups—less ideological traditionalists and young conservatives—that President Erdoğan shows signs of weakness. For that reason, CAP began a research project to gauge how deep Erdoğan’s support is among these groups; to better understand what shapes the political and religious convictions of young conservatives; and to uncover who on the conservative right these segments might consider as possible alternatives or successors to Erdoğan. Late in 2019 and early in 2020, CAP conducted five focus groups of young conservative Turks and polled some key questions—again working with Metropoll—to learn more about this demographic’s attitudes toward politics and religion in public life. The focus groups and polling are not definitive, but the qualitative observations provide texture and context, helping illustrate why the AKP’s core religious conservative pitch is losing sway with some younger Turks, particularly in urban areas.

These young voters have come of political age entirely under AKP rule, with President Erdoğan dominating public life. But this group, far from becoming a “Generation Erdoğan” devoted to the president, is largely unenthusiastic about him and his party. These voters are generally respectful of his legacy, especially on behalf of religious people, but they are not excited by him or the AKP. Many still see Erdoğan as the “best of the bad options” and struggle to imagine alternatives, but he is also the embodiment of an establishment that is seen to be failing young Turks, whose unemployment rate hovered around 25 percent even before the coronavirus pandemic further devastated the economy.⁸ In every survey CAP has conducted, younger Turks are less supportive of Erdoğan and the AKP than their older counterparts. This is important: 18- to 29-year-olds are now the largest demographic voting bloc in Turkey,⁹ and each year millions of Turks reach voting age; several million more will join the voting ranks before the next scheduled election in 2023.

This is not the AKP’s only demographic challenge; the party has also lost significant Kurdish support, perhaps irretrievably, through its nationalist pivot and the abandonment of the peace process with the PKK. The reasons for the breakdown of the peace process are complicated, but Erdoğan’s domestic political imperatives played a major role in the resumption of the conflict, with the government’s brutal crackdown helping drive away Kurdish supporters.¹⁰ After the June 2015 elections saw the Kurdish-sympathizing Peoples’ Democratic Party (HDP) win 80 seats in the Turkish Parliament, helping deny Erdoğan and the AKP an absolute parliamentary majority for the first time, Erdoğan saw his political ambitions at risk and began to aggressively court the anti-Kurdish nationalist right. This nationalist pivot has worked thus far, allowing Erdoğan to replace lost Kurdish votes with right-wing nationalists and eke out the electoral results he has needed in presidential and parliamentary elections since 2015. But more recently, Kurdish votes were critical in defeating the AKP’s mayoral candidate in Istanbul in the 2019 nationwide local elections.¹¹ This was an ominous development for Erdoğan and the AKP. Moreover, the Kurdish vote has been steadily increasing as a percentage of the overall national vote for decades, and it is likely to continue to do so; the Kurdish fertility rate is 60 percent higher than the Turkish fertility rate.¹² Thus, it will only get harder for Erdoğan to win without Kurdish support, and his nationalist pivot has left him politically cornered and increasingly reliant on the far right to maintain his rule.

A search for alternatives

The general discontent with the direction of the country is not limited to young people, according to CAP/Metropoll polling and focus groups. Across all age groups, President Erdoğan now has a diminishing group of dedicated partisan supporters. In October 2019, for example, roughly one-third of the country said they “supported” Erdoğan, but

just 27 percent of all Turks—though 74 percent of AKP voters—said they were “loyal” in their support of him.¹³ Again, this means that the balance of power rests with conservatives of various stripes that have thus far coalesced around Erdoğan because they do not see other options or because they have found the opposition alternatives presented in past elections to be unpalatable. It is this group of conservative potential swing voters who can provide or deny Erdoğan the more than 50 percent he needs to win the presidency again and give the AKP-led governing alliance a parliamentary majority. And it is among this group that there are warning signs for Erdoğan.

Prompted by focus groups that pointed to wavering conservative enthusiasm, in October 2019, CAP and Metropoll asked a representative nationwide sample of Turks if they could imagine someone other than President Erdoğan leading the AKP. Just 21 percent of AKP voters said they could envision another leader, while 73 percent said it could only be Erdoğan; responses were identical among MHP voters—the other key component to the AKP’s rule in the post-2015 configuration of Turkish politics. But when the same questions were repeated in April 2020, things had changed. The share of AKP supporters who said they were “loyal” in their support of Erdoğan had fallen by 10 points to 66 percent.¹⁴ And the share of AKP voters who could envision someone besides Erdoğan leading the party had increased dramatically to 37 percent, while among MHP voters—who are essential for Erdoğan to secure a narrow majority—the share had jumped even more to 48 percent.¹⁵ Suddenly, conservatives seemed to be considering their options.

Following up with those who said another leader was possible, CAP and Metropoll asked poll respondents about potential successors, listing a number of prominent conservatives. In October 2019, opinion was fragmented, but the overwhelming majority simply could not contemplate the possibility of someone other than Erdoğan ruling the AKP. Interior Minister Süleyman Soylu was the top prospect with 17 percent, followed by former Deputy Prime Minister Ali Babacan with 12 percent, former Prime Minister Ahmet Davutoğlu with 8 percent, Finance Minister—and Erdoğan son-in-law—Berat Albayrak with 8 percent, and former President Abdullah Gül with 7 percent.¹⁶ Again, this fragmentation was among the subset of the population who could even envision a leader other than Erdoğan—there were no serious prospects, though there was potential for Soylu.

But by April 2020, there had been a remarkable consolidation around Soylu, who now registered 38 percent of those who could see another leader, drawing heavily from both AKP and MHP and from self-described religious, conservative, and nationalist voters. This broad ideological appeal on the right likely reflects Soylu’s split political persona:

He is currently AKP interior minister, of course, but his political background is as a figure of the nationalist wing of the old-school Turkish center-right and protégé of former Interior Minister Mehmet Ağar, rather than an AKP true believer grown out of the Millî Görüş movement.¹⁷ Erdoğan effectively rescued Soylu politically by bringing him into the AKP after his former parties faded to obscurity, and Soylu has used his current public role as interior minister to court the “Turkey First” nationalist right wing in recent years.¹⁸ Importantly, in the CAP/Metropoll survey, Soylu also drew disproportionate support from younger respondents. Every other conservative leader polled had fallen off the radar in terms of conservative support, reflecting Soylu’s rise as well as, perhaps, a hardening of AKP and MHP voters’ opinions toward Davutoğlu and Babacan following their founding of rival conservative parties and the AKP-controlled media’s subsequent assault against them. The results were reinforced in May 2020, when 50 percent of respondents—and 58 percent of those ages 18 to 24—reported having a favorable view of Soylu.¹⁹ As discussed further below, the focus groups echoed these findings, with general openness or curiosity about Soylu.²⁰

Coronavirus confusion or a lasting shift?

Some of this movement on the conservative right could be attributed to the highly unusual context of the current moment; Turkey, as with much of the rest of the world, has been turned upside down by the coronavirus pandemic and government-mandated lockdowns to control its spread. Many leaders saw polling bumps as the coronavirus struck—part of a general rally-around-the-flag effect that was visible worldwide. President Erdoğan’s approval rating has certainly reflected this: His approval rating jumped to 56 percent in March and 52 percent in April.²¹ But prior to this bump, his approval had fallen to 41 percent.²² As the economic toll of the coronavirus unfolds—on top of Turkey’s already dire economic situation, with high unemployment and a dramatically weakened currency—it is quite possible that Erdoğan’s approval will deteriorate once again.

But despite this recent rebound in his approval rating, there are reasons to suspect the underlying changes on the Turkish right run deeper than the response to the pandemic. When President Erdoğan’s position is viewed in relative terms, the news is much less clear-cut. Erdoğan is still the most favorably viewed politician in the country, but other political figures are now viewed just as favorably by the electorate. Istanbul Mayor Ekrem İmamoğlu, Ankara Mayor Mansur Yavaş, and Interior Minister Süleyman Soylu are all essentially level with Erdoğan—viewed favorably by roughly half of poll respondents in April 2020 and May 2020.²³ This is a remarkable development: No other politician has come close to matching Erdoğan’s favorability in at least a decade.²⁴ The popularity of prominent opposition mayors is noteworthy, but Soylu’s strength among younger conservatives—both nationalist and religious—is of particular note, representing a new rising star of the right.²⁵ This rise likely reflects both enthusiasm for Soylu personally and a general interest in conservative alternatives to Erdoğan.

Signs of conservative fragmentation

The focus groups offer qualitative reasons to believe there is more to this shift than the coronavirus pandemic and that, indeed, there are early signs of a slow deconsolidation of the right-wing bloc that has dominated Turkish politics in recent years. Once again,

the focus groups are far from definitive and primarily reflect the views of young urban conservatives; they are not nationally representative and are most useful as a tool alongside the quantitative evidence provided by polling. The focus groups were all conducted before the coronavirus arrived but picked up on important early signs of these trends, such as the rapid rise of Soylu on the right wing and the perhaps surprising openness of many young conservatives to Mansur Yavaş and even Ekrem İmamoğlu, leaders from the usually vilified main opposition Republican People's Party (CHP).

The focus groups were screened to select young conservatives who identify as AKP and MHP supporters—staunch supporters in some groups and “leaners” in others. Watching the groups discuss Turkish culture and politics, the first thing that strikes an observer is that the participants would likely not be in the same room but for the unifying effect Erdogan's dominance has had on Turkish conservatives and nationalists. The conservative constituencies and archetypes identified in CAP's earlier research on “Turkey's New Nationalism” are still very visible; the right wing of Turkish politics is diverse, and it is primarily held together by President Erdogan.²⁶ This fact remains an enduring source of Erdogan's strength and a powerful disincentive to potential conservative challengers.

The working- and middle-class religious conservative and cultural traditionalists who have long been the core of the AKP are still a plurality, but among the younger cohorts they do not seem to enforce norms among the group the way core AKP supporters tend to do in groups comprised of older voters. There is a great deal more heterodoxy among young conservatives. While Erdogan devotees are still numerous, of course, they seem to be less common among younger demographics than in older groups. The negative partisanship and rhetoric of grievance that has been so potent for the AKP—defining the party as much by who they oppose and by what they reject as by what they are for—is still effective, and there is a great deal of hostility toward the CHP. But interestingly, among these urban conservatives, this hostility does not seem to extend to the new generation of opposition leaders such as Mansur Yavaş and Ekrem İmamoğlu. Indeed, there is even some enthusiasm for Yavaş—a former MHP member—likely rooted in the perception that he is a figure of the right wing who is focusing on the business of running Ankara and eschewing national politics. Most participants seemed to shrug off the AKP press' attacks on Ali Babacan, with several taking issue with Erdogan's charge that Babacan is “dividing the ummah” by forming a breakaway party.²⁷ And there was a great deal of interest and curiosity in Soylu; indeed, an outright majority of one group of young urban conservatives listed him as their favorite politician.²⁸

Part of Soylu's appeal may be the perception that he has taken a hard line as interior minister against the 3.6 million Syrian refugees living in Turkey.²⁹ Soylu has sometimes played to this hostility on the nationalist right—though it is hardly limited to conservative sectors; for example, Soylu declared in 2019 that all Arabic signs would be replaced by Turkish signs, though he has also overseen some limited naturalization of Syrian refugees, mused about further naturalization, and publicized the return of some 300,000 to Syria.³⁰ Indeed, it is a potent political issue, and there is still deep hostility toward refugees across all age groups in Turkey, borne out in numerous polls as well as the CAP/Metropoll focus groups.³¹ This hostility has not abated among young conservatives. Several focus group participants blamed the AKP's setbacks in the local elections on Erdogan's Syrian refugee policies. If anything, hostility seems to be shifting into more actionable talk. People have long complained about the presence of the Syrian refugees in Turkish cities, expressing anger that they hear Arabic spoken so widely in their neighborhood or that Syrians are lowering wages. A common complaint is that young Syrian men should be fighting in Syria's civil war, not living in Turkey. These complaints have only become more strident, and some now talk openly of violence, as did one participant who, referring to the public mobilization around the attempted coup in 2016, said that "on July 15 we showed how we can mobilize as a nation, we can do the same and force out the Syrians."³² This may be mere bluster, but it is at least somewhat a barometer of the anger on the right regarding the refugees. And it is not all talk, given the examples of intercommunal violence and local scuffles in recent years.³³

The anger about the presence and visibility of the Syrians is only exceeded by unhappiness about the state of the economy and the rising cost of living, particularly rent and groceries. As one would expect, most people's concerns are parochial—affording their next rent payment or finding a decent job—exacerbated by an economy in which inflation is persistently high, the lira has weakened significantly, and wage growth and job creation are largely stagnant. For young people in particular, finding a job can be quite difficult, with youth unemployment around 25 percent.³⁴ Again and again, young participants would lament petty corruption and the patronage system that is seen as greasing the wheels of AKP rule, often saying that "you need to know someone—an MP or a politician—to get a job here."³⁵ Even strong AKP supporters see this as petty corruption and cronyism, feeding into the widespread, generalized discontent about the refugees and the economy.

But at least among these young conservative circles—and at least in the semipublic setting of a focus group—few connect these problems directly to President Erdogan. Indeed, participants often use some classic monarchic techniques to excuse failings, such as "it is because he is badly advised" or "he just needs to get out and talk to young people more, that is all, and he would fix things."³⁶ Indeed, it seems Erdogan and his

advisers are aware of this sense of detachment, though a June 2020 attempt to engage with young people via YouTube ended with a torrent of criticism from online viewers and the social media trend #OyMoyYok, which translates as, “You will not get my vote.”³⁷ But while many participants in CAP’s focus groups do not think the current malaise is Erdoğan’s fault—or will not say so in public—the president is seen as distant and out of touch by many young conservatives. When focus group moderators asked what participants thought Erdoğan should do about declining support among the youth, none disputed the premise of the question.

Deeper cultural currents and religion in public life

The focus groups also sought to explore a range of questions about cultural identity and the place of religion in public life. These discussions seemed to reveal a broadly felt anxiety about Turkey “losing our traditions.”³⁸ This is, of course, a difficult subject to pin down, but this sense of cultural loss was a consistent refrain. This feeling may be tied to the dislocation of urban life; Istanbul’s physical landscape, in particular, has been transformed in these young participants’ lifetimes, and the overall pace of Turkish urbanization has been astonishing.³⁹ It may also be tied to Turkey’s perceived vulnerability to foreign forces, reinforced in the public’s mind by constant government-fed propaganda about outside conspiracies to weaken or divide Turkey.⁴⁰ It may also be linked to the Syrians’ presence in urban centers and Turks’ concomitant anger about a perceived dilution of Turkish culture.

Famously, Erdoğan has spoken repeatedly of his desire to build a “pious generation”—perhaps partly a response to this sense of cultural loss or erosion.⁴¹ In the focus groups, most young conservatives welcomed this goal but equally felt it was important for it to be voluntary and not driven by the state. Likewise, several felt that there had been an unnecessary proliferation of Imam Hatip schools in recent years and that attendance at them should be strictly voluntary; they took issue with a recent AKP policy that directs students living near Imam Hatips to attend the schools. When prompted to discuss religion in public life, most discussants seemed to default to conversations about cultural traditionalism rather than religion itself. People felt strongly that manners and basic behavioral norms, particularly respect for one’s elders, were being diluted or lost in modern Turkey to society’s detriment.⁴² This has been a frequent theme for Erdoğan and the AKP through the years. One participant lamented that “families raise their children without discipline and respect … they need to improve themselves religiously. I try to raise my children within a certain moral framework, a framework of morals and manners.”⁴³

There was also substantial evidence of powerful AKP mythmaking. Some of the collective memory shaping the worldview of this younger conservative cohort is clearly derived from the narrative of the older generation. For example, young conservatives have thoroughly internalized their parents' stories about garbage piling up in the streets of Istanbul before Erdoğan and the AKP took over in 1994.⁴⁴ Most legendary—and immediate—is the 2010 lifting of the headscarf ban that prevented admission to universities or public buildings for covered women. The end of the ban was the culmination of a long political struggle by the AKP on behalf of religious conservatives—one that all but the youngest supporter is likely to remember—and is a particular source of emotional affinity to the party.⁴⁵ These two accomplishments of the AKP era remain enduring sources of support for the party and for President Erdoğan. The July 15 coup attempt and the popular resistance to the plot is another pillar of this generation's self-perception. For most conservatives, Erdoğan and the AKP saved the country. But this affinity is not universal, as some young conservatives blame the governing party for allowing the Gülenists to infiltrate the state, whereas others feel the firings of civil servants went too far.⁴⁶ In one focus group, a participant lamented that the firing and arrest of so many Imam Hatip school alumni as Gülenists had tarred those schools' reputations, deterring enrollment by many potential future students.⁴⁷

The support for state-sponsored religion—for example, religious courses—was usually framed in terms of the cultural traditionalism outlined above. People felt that religion was important primarily as a way to teach children about their culture, both to reinforce traditional behavioral norms and to guard against outside infiltration or the dilution of Turkish culture. Support for this use or role for religion in public life was strong and widely held, extending in most cases to support for religious education in public schools, including courses in the Quran and the “life of the Prophet.”⁴⁸ But the support for religion in public life did not extend to some of the other direct components of state involvement with religion; the Diyanet and the religious foundations (*vakıflar*), for example, were often viewed quite negatively. Most respondents did not think that the religious foundations should receive government or municipal support—an issue in the news at the time the focus groups met. Some participants complained that the Diyanet is merely a government mouthpiece rather than a true source of religious leadership.⁴⁹ Often, the criticism of the Diyanet and the religious foundations seemed like a way for participants to talk about corruption without sparking an argument in the room.

These qualitative findings help contextualize quantitative data points uncovered in a CAP/Metropoll nationwide survey in October 2019. Asked whether “society today leaves personal behavior mostly free or restricts it,” 30 percent of Turks said it is “mostly free,” while 50 percent said it is restricted. But 41 percent of AKP voters said personal behavior was mostly free, while 39 percent said it was restricted; among MHP voters,

the split was 43 percent to 34 percent.⁵⁰ These results among conservative voters were starkly different from opposition voters: Just 12 percent of CHP voters said society left personal behavior mostly free, while 75 percent said it was restricted. Predictably, across all parties, women were more likely to say society was restrictive, while young respondents were, perhaps surprisingly, more likely to say personal behavior was mostly free. The survey also asked, “In today’s society, which is more dangerous, deism/atheism or religious extremism?” Overall, 32 percent of Turks said deism/atheism was more dangerous, while 46 percent said religious extremism. But among AKP voters, 50 percent said deism/atheism was more dangerous, and just 28 percent said religious extremism; among MHP voters, a plurality of 40 percent said deism/atheism was the bigger threat, while 32 percent said religious extremism.⁵¹

Despite this expected—though far from absolute—conservative support for religious culture, the focus groups revealed substantial resentment about the prevalence of “performative religiosity” in public life. This took several forms, most often as complaints about women who wear the headscarf but do not behave modestly enough for some conservatives’ taste or who view the headscarf as a way to telegraph the wearer’s socioeconomic status, rather than, in the complainants’ view, genuine religious devotion. Others complained about how many religious people are obsessed with material wealth, or about politicians who “use religion” to advance their political ambitions.⁵²

These complaints often seemed to provide a way for people to express a sense that traditional culture and community norms were being eroded, as well as generalized discontent about the perceived corruption of public life. But it was also clearly a gender issue, with men generally leading the complaints about women behaving too freely in public for their taste. Conversely, several female participants praised the AKP government for having expanded professional opportunities for women. Finally, particularly among the youngest cohort of conservative voters, the resentment of performative religiosity fed into a reluctance to accept the secular-religious divide that is almost second nature to the older cohorts. Several expressed a “live-and-let-live” attitude toward secular Turks. Some asserted that it is possible to be both secular and religious at the same time, clearly defining “secular” to mean something akin to tolerance; this is a far more generous definition than that traditionally ascribed to the Turkish concept of secularism (*laiklik*), a concept closer to French anti-clericalism that denotes state control of religion than it is to the American idea of separation of church and state.⁵³

Different information ecosystems

These signs of generational change are not surprising; Turkey has changed rapidly in the past 20 years and experienced dramatic internal and external crises. The memory of Bülent Ecevit—the last leader before the AKP won power—and the 2001 economic crisis has faded for many older Turks and, for the youngest generation, is just a story told to them by their parents. The galvanizing sense of oppression or exclusion has faded for some conservatives as President Erdoğan and the AKP represent the political establishment, and their supporters have come to dominate socioeconomic life as well as the media.

This last point is worth reinforcing: Younger Turks—particularly in the major cities—and their older counterparts increasingly inhabit different information ecosystems. This is driven by deep distrust in the largely government-controlled mainstream media, which is contributing to a rapid turn to social media and online news. Those thinking that the media is “biased” (*taraflı*) and “untrustworthy” (*güvenilmez*) reached 70 percent in 2018, rising to 77 percent in 2020, with a particularly sharp rise among AKP voters, among whom mistrust rose from 50 percent to 62 percent over the same period.⁵⁴ The proportion of Turks ages 18 to 34 who rely primarily on social media for news has grown rapidly, more than tripling from 2015 to 2018, according to CAP/Metropoll polling.⁵⁵ The trend has accelerated and broadened of late; according to a July 2020 Metropoll survey, the percentage of overall voters who get their news primarily from social media and the internet increased from 19 percent in 2018 to 32 percent in 2020.⁵⁶ The shift among younger Turks has been even more dramatic, with 67 percent of those ages 18 to 24 and 50 percent of those ages 25 to 34 now relying on social media and online news sites as their primary source of news.⁵⁷ Among Turks older than age 55, meanwhile, just 9 percent rely primarily on social media and online news, with this older cohort relying heavily on government-dominated television to get their news; indeed, some 81 percent of Turks older than age 55 rely on television for their news, while just 24 percent of those ages 18 to 44 rely primarily on TV news.⁵⁸

The growing divergence of younger and older Turks into discrete media spheres may be feeding into broader generational divides over politics and cultural life.⁵⁹ This has important political implications for President Erdoğan and the AKP. Statistical analysis of CAP’s survey data found that “Turks who relied on online platforms or social media for news, as opposed to television, were significantly more likely to disapprove of President Erdoğan, even after controlling for their vote in the November 2015 elections.”⁶⁰ Either online news is undermining Erdoğan’s standing with young conservatives, or young conservatives are turning to online news because they have doubts about the president; either way, it is bad news for Erdoğan and the conservative establishment.⁶¹

Political implications

Taken collectively, these trends could have important political implications. Certainly, more research is needed into the profile of those individuals and groups turning away from the AKP and the reasons for and likely durability of their disillusionment. But the polling and focus groups point to some areas of obvious importance.

First, the economic crisis is clearly weighing heavily on the government's popularity. Unlike in 2008–2009, when Turkey's economic troubles were clearly part of a global slowdown, the government has less ability to portray the economic stagnation of recent years and the acute crisis that began in 2018 as the fault of others. Equally, the government—in power now for 18 years—seems to have few new ideas for how to shake Turkey from its economic malaise. The fallout from the coronavirus pandemic has further hurt Turkey's economy, devastating the tourism sector on which the country relies.⁶² Low energy prices have been a saving grace for import-dependent Turkey, but the pandemic seems to augur a long, slow recovery, though at least the government can now point to many other countries in the same situation.⁶³

Second, the Syrian refugee issue remains a major drag on the popularity of President Erdoğan and the AKP. This is where Erdoğan has taken some of his most aggressive actions, repeatedly deploying the Turkish military in unilateral operations designed in part to secure areas in Syria to which Syrians living in Turkey can return. While Turkey's first two major military operations in Syria were primarily aimed at the Peoples' Protection Units (YPG), the mainly-Kurdish militia that cleared much of northern Syria from the Islamic State but which Turkey views as an enemy, the most recent interventions were justified in part on humanitarian grounds to prevent further out-migration and to clear areas for the safe return of refugees.⁶⁴ Reinforcing this point, the government has trumpeted the return of Syrians to these Turkish-controlled areas of Syria, though only a small fraction of the Turkish refugee population has returned to Syria.⁶⁵ Polls show that most Turks favor this approach, and previous military incursions have brought a temporary spike in support for the government's Syria policy, though the most recent intervention in Idlib yielded a more uncertain public reaction.⁶⁶ President Erdoğan has also repeatedly threatened to send the Syrians to Europe and, in early 2020, made good on that threat—for a time—in a very public manner, arranging buses to take refugees to

the Greek border and prompting an acute crisis.⁶⁷ Erdoğan’s move was designed to pressure the European Union to provide more funds to care for refugees in Turkey as well as to gin up political support for Turkey in the military standoff in northern Syria, but it was also aimed at reassuring Erdoğan’s domestic constituents that he was taking aggressive action to reduce the number of refugees in the country.⁶⁸ Despite these actions, domestic anger about the refugees remains very high and significantly shapes Turkish policy both in Syria and vis-a-vis Europe.

Third, Turkey is in the midst of an important generational change; voters ages 18 to 29 represented 25 percent of the electorate in the last general election and will almost certainly comprise a larger share by the next vote.⁶⁹ As previously noted, these young Turks are increasingly getting their news from online sources that the government finds more difficult to control, though the AKP has passed new legislation to further limit social media independence.⁷⁰ Young people are angry about the lack of good jobs. They are less religious than their older counterparts across a range of measures.⁷¹ Many of these young voters can barely remember a time when Erdoğan and the AKP were not the dominant political force, and they are not happy with the direction of the country. The youngest demographic does not seem to find the secular versus religious divide as important as their older counterparts. The cultural resentments on which Erdoğan has long played are not as potent among young conservatives, who are used to having their views represented at the top. And the AKP’s biggest accomplishments in conservative minds—such as the lifting of the headscarf ban or the improvement of health care and municipal services—are taken for granted by many of those who came of age in the past decade.⁷² There is still a reservoir of good will from these accomplishments, but it has been overtaken by a sense of “what have you done lately?” among many in the younger cohort.⁷³

These broader trends have changed the political landscape, and new political personalities are seeking to take advantage of the shift. Unhappiness over the economy and the refugees, as well as the new unity of the opposition political parties, propelled the opposition parties to high-profile victories in major cities, most notably Istanbul and Ankara. This has made Ekrem İmamoğlu and Mansur Yavaş into political celebrities and obvious executive alternatives to Erdoğan, more so than any figure in the now-sidelined parliament. Erdoğan himself set this precedent, riding his prominence as mayor of Istanbul to the prime ministry.⁷⁴ The opposition victories and waning popularity of the AKP and Erdoğan have also encouraged conservative dissidents such as Ali Babacan and Ahmet Davutoğlu, who have both formed new parties to challenge their former boss.⁷⁵ These parties need not win widespread support to be politically decisive; even if they only appeal to small conservative subconstituencies,

it is potentially important with such a narrowly divided electorate, particularly if they take votes from Erdoğan and the AKP. Indeed, both men do seem tuned to specific conservative wavelengths: Davutoğlu’s pan-Islamism could appeal to a small group of “compassionate Islamists” on the right, despite the policy failures in Syria,⁷⁶ and Babacan’s appeal seems aimed at moderate business-minded conservatives who favor a return to technocracy and steady economic stewardship.

These breakaway parties hint at a broader right-wing deconsolidation. From 2007 to 2017, Erdoğan’s political dominance was such that, for conservative leaders, the only way to power and patronage was to join the party: The AKP spent much of the decade absorbing new conservative constituencies and building a formidable right-wing political bloc. Now, ambitious dissident conservatives can hold out hope of an avenue to influence outside the AKP.

This raises the prospect—unlikely as it remains—for additional right-wing challenges to Erdoğan. Süleyman Soylu has polled at levels of favorability and potential support above those of any conservative figure of recent years besides Erdoğan himself. Soylu draws support from nationalists and religious conservatives, as well as disproportionate support from young people. Questions remain, however, about what is driving Soylu’s rise, the answers to which will determine if it is durable.⁷⁷ But the most important issue is whether he would dare challenge Erdoğan directly, perhaps forming a new party, or if he is simply maneuvering to succeed him. Erdoğan recently rejected Soylu’s proffered resignation following the latter’s bungled curfew decision, perhaps pressured somewhat by a social media campaign and small protests on Soylu’s behalf.⁷⁸ Tellingly, MHP leader Devlet Bahçeli likewise offered Soylu support, saying he should remain as interior minister.⁷⁹ Soylu is also locked in a tense rivalry with Erdoğan’s son-in-law Berat Albayrak for influence and, potentially, the position of heir apparent.⁸⁰ If Erdoğan were to feel threatened by Soylu’s popularity, what steps would he take to negate Soylu’s rise?

Besides Soylu, of course, the AKP continues to rely on the ultranationalist MHP, held together in large part by the mercurial Bahçeli, whose health problems caused him to withdraw from public life for several weeks in late 2019.⁸¹ For the first time in many years, Erdoğan’s political fate is not entirely his own—a defection from either of these key conservative allies could fatally undermine his electoral coalition and, potentially, his personal electoral prospects.

Even if there is no election until 2023, the perception that Erdoğan is losing ground politically will likely shape his own behavior and that of others both at home and abroad. At home, this vulnerability will likely increase the government’s already-severe repression. President Erdoğan and the AKP are surely aware of their flagging support, the

dangers posed by new opposition political personalities, and their dependence on figures such as Soylu and Bahçeli. Erdoğan has long sought to preside over Turkey’s 100th anniversary as a modern state, aiming his governing agenda at the 2023 centenary; it would be crushing to lose an election that would leave him just short of that goal.⁸² President Erdoğan may also fear prosecution if he were ousted by the political opposition, based on, if nothing else, corruption allegations dating back to December 2013.⁸³ He and his party will do everything they can to shape the electoral environment—for example, by making it harder for the breakaway conservative challengers to have an electoral impact and tightening control of social media outlets to further stifle dissent.⁸⁴

Beyond tilting the political playing field, Erdoğan, facing a tight reelection campaign, is certain to continue to stoke nationalism through repression of Kurds at home—an approach that also presents difficult choices for the opposition parties in managing their own coalition. On the other hand, if there is a general perception that Erdoğan is on his way out, both the media and even the judiciary may be emboldened to take positions contrary to Erdoğan’s liking. There was some short-lived evidence of this phenomenon following the June 2015 elections, when the AKP briefly lost its parliamentary majority for the first time. As it turned out, Erdoğan forced an unprecedented second round of elections later that year, reopened the conflict with the PKK, and recaptured the AKP’s absolute parliamentary majority.⁸⁵

This nationalist aggression is likely to extend to foreign affairs. In recent years, President Erdoğan has often used military operations and confrontations with foreign leaders to rally his base; indeed, Turkey’s military actions abroad have broadly aligned with the electoral calendar.⁸⁶ With Turkey militarily engaged in Syria, Iraq, and Libya—and at loggerheads with the Greeks and Cypriots over Eastern Mediterranean maritime boundaries and potential energy resources—there is no shortage of potential flashpoints.⁸⁷ It is likely that the Turkish leader would precipitate a crisis on one of these fronts in the run-up to a close election, presenting a bold use of force and aggressive rhetoric as a sign of his—and Turkey’s—stature on the international stage and playing to the nationalist right’s hostility toward foreign countries and tendency to rally around the flag.

On the other hand, a perception abroad that President Erdoğan and his party face likely defeat in the next election could have other effects. Foreign governments may be less solicitous of Erdoğan than they are now, when he is widely regarded as a near-permanent fact of life as the autocratic leader of an important country. Alternatively, those considering sanctions on Turkey for its various perceived transgressions—including the U.S. Congress and the European Union—might begin to consider how their actions will play

in Turkish electoral politics as well as the extent to which such actions could shape the approach of a potential new Turkish government and Erdoğan successor. A sense of his imminent electoral demise might also weaken support for Erdoğan from an ally such as Qatar and diminish his standing on the Arab street.

For the United States and Europe, these trends and questions underpin critical strategic assessments. At present, it is highly uncertain that Erdoğan could win a free and fair election. If he resorts to outright electoral fraud, would the United States and Europe accept and accommodate the end of Turkish democracy or seriously downgrade relations with a crucial regional power? How would the European Union respond if Erdoğan provokes a clash with Greece or Cyprus—both EU member states—to rally the nation behind him heading into a tight election? The European Union’s efforts to manage refugee flows are similarly at the mercy of Erdoğan’s domestic calculus.

The United States must weigh how far to support Turkey in Syria or Libya, particularly if its actions are driven by the political requirements of a leader with dubious democratic credentials. The long-simmering issues of U.S. access to Incirlik Air Base—and the security of nuclear weapons housed there—remain of pressing importance, particularly given the likelihood of further political turbulence in Turkey.⁸⁸

Meanwhile, for NATO, Turkey is opposite fellow alliance member Greece in the Eastern Mediterranean standoff and stands against France in Libya; escalation on either front could have disastrous implications for alliance cohesion and credibility. Indeed, France suspended participation in a NATO naval operation in the Mediterranean after an incident between French and Turkish warships as the former attempted to search a warship believed to be carrying Turkish arms to Libya.⁸⁹ Greece and France both dispatched warships to disputed waters in the Eastern Mediterranean after Turkey sent a drilling ship—likewise escorted by warships—to explore for undersea energy resources; the showdown led to an accidental collision between Greek and Turkish warships, and tensions remain high.⁹⁰

Conclusion

The ebb and flow of conservative Turkish opinion might seem far removed from the strategic maneuvers taking place across the Mediterranean and the Levant or the tussle between the United States and Russia to secure leverage over an independent-minded Turkey. But Erdoğan's overriding interest is regime security; that security is determined in Turkey's present competitive authoritarian structure by a small set of wavering conservatives—particularly among the youngest cohorts. If a figure such as Soylu emerges as a likely successor on the Turkish right, it similarly augurs ill for Turkish-Western relations. Soylu—the only senior Turkish official who openly accused the United States of fomenting the 2016 coup attempt—is another avatar for a reactionary and aggressive strain of Turkish nationalist politics.⁹¹ Under his leadership, virulently anti-Kurdish and anti-American positioning would likely remain a durable feature of Turkish conservatism. This political vein all but precludes a moderation of conservative politics. And yet the popularity of the opposition mayors and the tactical prospects of Babacan and Davutoğlu's breakaway parties—each of which appeals to a subconstituency of the Turkish right and center-right—offer a reminder that large segments of the Turkish public do not share this combative outlook. Perhaps jingoism on Turkey's conservative right will fade if the opposition wins in 2023 and forms a government—a series of big “ifs.” Certainly, an opposition government would have less reason to actively stoke anti-Western feeling or provoke policy clashes with the United States. But even a new government would feel pressure to respond to the most strident nationalist voices. Surveying the political terrain, it seems as likely that Turkey could see either a contested election characterized by widespread fraud or a general fragmentation on the Turkish right without any clear successor to Erdoğan, with nativism continuing to define the mainstream of Turkish politics.

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Endnotes

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