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RESEARCH ARTICLE

The United States facing allies' populist blackmail: Why the Philippines and Turkey threatened to realign with China and Russia

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Abstract

Given China and Russia's increasingly aggressive behaviour, balance of threat theory posits that formal US allies should close ranks behind the United States. The literature on alliance politics reinforces this logic by showing that alliances deter aggression and reduce the occurrence of war. Recent developments, however, have somewhat undermined these claims, as the president of the Philippines, Rodrigo Duterte, and the president of Turkey, Recep Tayyip Erdogan, publicly threatened to break ranks with Washington and to realign with China and Russia respectively. How can we make sense of such defiant behaviour? This article argues that populist blackmail elucidates this phenomenon and compares it to three alternative propositions: conventional bandwagoning, bandwagoning for profit, and hard hedging. Based on empirical evidence, the article reveals that the provocative statements of Duterte and Erdogan were not a genuine push for realignment with Beijing and Moscow, but rather political strategies designed to enhance their bargaining power with Washington in the hopes of securing certain concessions, while simultaneously galvanising domestic support to justify their raison d'être and to secure their hold on power. Furthermore, the article infers that two concomitant factors – political grievances and the perceived lack of security assurance – propelled both presidents to resort to blackmail.

Keywords: alliances; blackmail; Philippines; populism; Turkey; United States

Introduction

The United States and its allies are increasingly concerned about the prospect of war with China and Russia.[1] Given Beijing's assertive behaviour in the East and South China Sea and Moscow's aggressive posture in Eastern Europe and the Caucasus, balance of threat theory posits that formal US allies will balance against these threats by closing ranks behind their security patron.[2]

[1]Allison Graham, *Destined for War: Can America and China Escape Thucydides's Trap?* (New York: Houghton Mifflin Harcourt, 2017); Michael E. Ecker, Matthew S. Cohen, Sidita Kushi, and Ian P. McManus, 'Revisiting the Russian empire: The Crimean intervention through a neoclassical realist lens', *European Security*, 25:1 (2016), pp. 112–33; Matthew Kroenig, *The Return of Great Power Rivalry: Democracy versus Autocracy from the Ancient World to the U.S. and China* (Boston: Oxford University Press, 2020); N. Kenneth Waltz, *Theory of International Politics* (New York: Addison-Wesley Publishing Company, 1979).

[2]Mira Rapp-Hooper, 'Saving America's alliances: The United States still needs the system that put it on top', *Foreign Affairs*, 2 (2020), pp. 127–40; Stephen M. Walt, 'Alliance formation and the balance of world power', *International Security*, 9:4 (1985): pp. 3–43; Waltz, *Theory of International Politics*.

The literature on alliance politics reinforces this point, as it shows that defensive alliances deter aggression and reduce the occurrence of war.[3] It also underlines that allies are unlikely to renounce their alliance commitment because it is costly in terms of cooperation benefits and reputation.[4]

Recent events, however, have somewhat undermined these claims, as US allies increasingly voiced concerns about the sustainability of the US hegemonic order and felt that Washington did not demonstrate sufficient commitment to ensuring their protection.[5] In this context, the Philippines and Turkey, two of America's formal allies, have openly questioned their alliance with the United States and publicly threatened to realign themselves with China and Russia. Following his 2016 election as president of the Philippines, Rodrigo Duterte made numerous harsh and controversial remarks about the United States and went so far as to publicly announce that he was breaking ranks with Washington. During his first visit to China in October 2016, President Duterte could not have been clearer about his intentions when he stated that 'America has lost. … I've realigned myself in your ideological flow and maybe I will also go to Russia to talk to Putin and tell him there are three of us against the world: China, Philippines and Russia. It's the only way.'[6] This announcement was surprising, considering that China was a growing threat to the Philippines. Beijing bolstered its military presence in the South China Sea, bullied the Philippines by building islands in contested waters, and claimed sovereignty and maritime rights over the Spratly Islands.[7]

Meanwhile, following several major political disagreements with Washington, Turkish president Recep Tayyip Erdogan publicly warned the United States that Turkey would diversify its security partnership, which could imply leaving NATO, unless Washington showed more respect for Turkish interests. In a 2018 *New York Times* op-ed, Erdogan wrote: 'Before it is too late, Washington must give up the misguided notion that our relationship can be asymmetrical and come to terms with the fact that Turkey has alternatives. Failure to reverse this trend of unilateralism and disrespect will require us to start looking for new friends and allies.' Erdogan implied that he could move closer to Russia and, to a lesser extent, to Iran.[8] This would seem to be somewhat counterintuitive, given that Turkey ultimately benefits from NATO protection. Moreover, President Erdogan's warning to America came after Russia had proven to be a destabilising force by invading Georgia and then by consolidating its power in the Black Sea following its annexation of Crimea in 2014.

How can we make sense of such defiant behaviour on the part of these formal US allies? Why did the Philippines and Turkey go so far as to publicly question their formal alliance at the risk of alienating the United States – their main security patron – and increasing their exposure to systemic threats? Given China and Russia's offensive capabilities, proximity, and foreign-policy intentions, should Manila and Ankara not have shown greater loyalty to their security patron? Disagreement within military alliances is common – the 1956 Suez Crisis and the 2003 Iraq

[3]Alastair Smith, 'Extended deterrence and alliance formation', *International Interactions*, 24:4 (1998), pp. 315–43; Alastair Smith, 'Alliance formation and war', *International Studies Quarterly*, 39:4 (1995), pp. 405–25; James D. Fearon, 'Signaling foreign policy interests: Tying hands versus sinking costs', *Journal of Conflict Resolution*, 41:1 (1997), pp. 68–90.

[4]L. Brad LeVeck and Neil Narang, 'How international reputation matters: Revisiting alliance violations in context', *International Interactions*, 43:5 (2017), pp. 797–821; Sarah Kreps, 'Elite consensus as a determinant of alliance cohesion: Why public opinion hardly matters for NATO-led operations in Afghanistan', *Foreign Policy Analysis*, 6:3 (2010), pp. 191–215; Brett Ashley Leeds and Burcu Savun, 'Terminating alliances: Why do states abrogate agreements?', *The Journal of Politics*, 69:4 (2007), pp. 1118–32; D. Gregory Miller, 'Hypotheses on reputation: Alliance choices and the shadow of the past', *Security Studies*, 12:3 (2003), pp. 40–78.

[5]Evelyn Goh and Ryo Sahashi, 'Worldviews on the United States, alliances, and the changing international order: An introduction', *Contemporary Politics*, 26:4 (2020), pp. 371–83; Alexander Lanoszka, 'Poland in a time of geopolitical flux', *Contemporary Politics*, 26:4 (2020), pp. 458–74.

[6]Shaun Walker, 'Duterte cuts short trip to Russia after declaring martial law in southern Philippines', *The Guardian* (23 May 2017).

[7]Fu Ying, 'Why China says no to the arbitration on the South China Sea', *Foreign Policy* (10 July 2016).

[8]Recep T. Erdogan, 'Erdogan: How Turkey sees the crisis with the US', *New York Times* (10 August 2018).

invasion are good illustrations – but public threats of realignment are rare events that constitute foreign-policy anomalies. They require special attention, given the growing uncertainty surrounding US global leadership and the increasing polycentricity of the international system, in which China and Russia play an increasing role. Additionally, from the perspective of the United States, both the Philippines and Turkey hold vulnerable yet strategically crucial geopolitical areas. The Philippines is perceived in Washington as a weak link within the so-called first island chain,[9] while Turkey's geographical position between the Mediterranean, the Black Sea, and the Middle East as well as its adherence to the Montreux Convention are of great significance for the United States.

This article contributes to the literature on populism and foreign policy, alignment, and intra-alliance politics by asserting that populist blackmail accounts for this puzzle. The threats issued by Presidents Duterte and Erdogan to break ranks with Washington were not genuine attempts to realign with Beijing and Moscow; rather, they were populist strategies targeting both international and domestic audiences. At the external level, they were crafted to prompt the United States to be more respectful of their interests, demands, and independence, while hoping to secure certain concessions from Washington. On the domestic front, these controversial statements played into their populist narrative, emphasising the divide between America's imperialists and the sovereign people being manipulated by Washington's foreign-policy elites.

For the sake of theoretical development, this argument is weighed and compared with three alternative and credible explanations – conventional bandwagoning, bandwagoning for profit, and hedging. Moreover, using the controlled comparison method of most different systems design, the article shows that two concomitant factors were present in the Philippines and Turkey: political grievances and the perceived lack of security guarantees from the United States. It also argues that further research should be conducted to assess whether these factors are necessary or sufficient conditions for the occurrence of populist blackmail.

The article is divided into three sections. First, it presents populist blackmail and each of the three alternative propositions, along with their respective hypotheses and confirmation conditions. Second, it examines these propositions in light of empirical evidence, specifically, by providing a detailed controlled comparison of the Philippines and Turkey's foreign- and defence-policy behaviour. The third section summarises the empirical findings and draws some policy implications.

Populist blackmail

Second-tier allies have different strategic options at their disposal to ensure their security. One of them, which has been neglected in the literature, is blackmail. As Daniel Ellsberg defined it years ago, blackmail is 'the art of influencing the behavior of others by threats'.[10] In the words of Richard Betts, 'it means coercion by the threat of punishment'.[11] North Korea has been the champion blackmailer in the post–Cold War era because it had an active nuclear-weapons programme that helped Pyongyang to obtain – or to extort – economic concessions from the United States and the West.[12]

But blackmail is not limited to nuclear states. Any actor with the ability to create a credible threat can pursue this strategy.[13] It can even be employed by allies against their security patron. As Stephen

[9]Andrew Yeo and Michael E. O'Hanlon, 'Geostrategic competition and overseas basing in East Asia and the first island chain', *Foreign Policy at Brookings*, February 2023.

[10]Daniel Ellsberg, 'The theory and practice of blackmail', RAND Corporation, 1968, pp. 1–38 (p. 2).

[11]Richard K. Betts, *Nuclear Blackmail and Nuclear Balance* (Washington, DC: The Brookings Institution, 1987), p. 4.

[12]Tristan Volpe, 'The unraveling of North Korea's proliferation blackmail strategy', Carnegie Endowment for International Peace, 10 April 2017; Victor Gilinsky, *Nuclear Blackmail: The 1994 U.S.–Democratic People's Republic of Korea Agreed Framework on North Korea's Nuclear Program* (Stanford, CA: Hoover Institution on War, Revolution and Peace, Stanford University, 1997).

[13]S. Todd Sechser and Matthew Fuhrmann, 'Crisis bargaining and nuclear blackmail', *International Organization*, 67 (2013), pp. 173–95; Peter Jakobsen, *Western Use of Coercive Diplomacy after the Cold War: A Challenge for Theory and Practice* (New York: Palgrave Macmillan, 1998).

Walt points out, 'a blackmailer can threaten to do something that its patron opposes, in the hopes of persuading the patron to give it something in exchange for acceding to the patron's preferences'.[14] The more blackmailers have the capability and credibility to harm Washington's interests, the more they are likely to extort concessions.

Different motivations can push an ally to blackmail. US allies can resort to it to get security reassurance and greater material support from their security patron,[15] as well as to obtain greater appreciation and value recognition from Washington. The literature on alliance abrogation shows, for instance, that states may end up re-evaluating their alliance commitment when international or domestic conditions change.[16] Allies affected by a change in the systemic distribution of power or by domestic factors, such as state–society relations or domestic political leadership, may make it quite costly to maintain their alliance commitment.[17] As a result, dissatisfied allies can try to negotiate new terms with their allies, by blackmail if necessary, or simply by breaking from their alliance commitments.

Building upon these previous findings, this paper argues that US populist allies may use blackmail to politically maximise the benefits of their alignment. On the one hand, they will use it to seek concessions from their security patron while leveraging tensions with Washington, and on the other hand, they will employ it to strengthen their populist appeal among their domestic audiences. Populism is a thin-centred ideology that divides society into two opposing groups: the true people and the corrupted elites.[18] This 'thin' ideology often coexists with 'thicker' ideological elements such as nationalism, socialism, or religious fundamentalism, depending on the national historical context.[19]

Populism is also easily transposed to foreign policy. Populist leaders' rhetoric often rejects foreign elites and international organisations in their quest to reclaim national sovereignty and popular authority.[20] Consequently, they frame foreign-policy issues in terms of two antagonistic groups: foreign elites (alongside their domestic affiliates), and the marginalised people in need of protection from hegemonic forces and supranational entities.[21] This framing leads populist leaders to define themselves as the exclusive representatives of the people and to be more personally and emotionally invested in foreign-policy formulation than their non-populist predecessors. This personalisation and centralisation of foreign policy elevate the significance of individual leaders' perceptions and psychological traits, ultimately intensifying the politicisation of foreign policy.[22]

Simultaneously, by politicising foreign policy to mobilise the domestic audience, populist leaders tend to marginalise the role of the foreign and defence bureaucratic establishment (often perceived as part of the problem), leading to less stable and predictable policies.[23]

[14]M. Stephen Walt, *Taming American Power: The Global Response to US Primacy* (New York: W.W. Norton & Company, 2005).

[15]FuDal Ng and Emel Parlar, 'Status-seeking policies of middle powers in status clubs: The case of Turkey in the G20', *Contemporary Politics*, 25:5 (2019), pp. 586–602.

[16]Tongfi Kim and Jennifer Dabbs Sciubba, 'The effect of age structure on the abrogation of military alliances', *International Interactions*, 41:2 (2015), pp. 279–308; Leeds and Savun, 'Terminating alliances'.

[17]Brett Ashley Leeds, Michaela Mattes, and Jeremy S. Vogel, 'Interests, institutions, and the reliability of international commitments', *American Journal of Political Science*, 53:2 (2009), pp. 461–76.

[18]Cas Mudde, 'Populism: An ideational approach', in Kaltwasser Cristóbal Rovira, Paul Taggart, Paulina Ochoa Espejo, and Pierre Ostiguy (eds), *The Oxford Handbook of Populism* (Oxford: Oxford University Press, 2017), pp. 27–47.

[19]Sandra Destradi and Johannes Plagemann, 'Populism and International Relations: (Un)predictability, personalisation, and the reinforcement of existing trends in world politics', *Review of International Studies*, 45:5 (2019), pp. 711–30.

[20]Erin K. Jenne, 'Populism, nationalism, and revisionist foreign policy', *International Affairs*, 97:2 (2021), pp. 323–43.

[21]Ibid.

[22]Destradi and Plagemann, 'Populism and International Relations'; Daniel Drezner, 'The angry populist as foreign policy leader: Real change or just hot air?', *The Fletcher Forum for World Affairs*, 41:2 (2017), pp. 23–43.

[23]Andrew F. Cooper, 'Adapting public diplomacy to the populist challenge', *The Hague Journal of Diplomacy*, 14:1–2 (2019), pp. 36–50.

As a result, foreign-policy decision-making under populist regimes becomes more susceptible to shifts and disruptions compared to non-populist governments. In this line, research has identified the over-centralisation of power in the procedural aspects of foreign policy as the most prominent transformation following the transfer of power from non-populist to populist governments.[24] Consequently, under populist regimes, strategic decisions lean more towards being political, emotional, and less institutionalised in comparison to non-populist governments.

Based on this discussion, this paper contends that populist blackmail differs from conventional forms of blackmail in three significant ways. First, it diverges in terms of motivation. Its objective encompasses not only obtaining international concessions from the patron but also garnering domestic public support. Second, it diverges in style. It arises from the centralisation and personalisation of foreign policy and is often manifested in an erratic and aggressive manner. Third, it diverges in content. Populist blackmail extends the elite/people division to the international sphere by highlighting the alleged exploitation of the 'true people' through the imperialism of the larger, malevolent ally.

Furthermore, this paper contends that US allies heavily reliant on US security and led by populist leaders are more inclined to resort to blackmail to serve their domestic mobilisation objectives. Often fuelled by anti-American sentiment and the politicisation of popular resentment,[25] blackmail in this context will reflect anger towards the security patron, with populist leaders' intending to demonstrate to their national constituents their willingness to break, to varying degrees, from past policies embraced by their 'corrupted' predecessors. Consequently, populist blackmail targets both international and domestic audiences. On the global stage, it aims to urge the security patron – the United States – to be more responsive to their interests and demands, while seeking concessions from Washington. At the domestic level, it serves to solidify their voter base, ensuring their grip on power remains intact.

Blackmail is also intimately linked to bluffing. US allies led by populist figures can bluff about their willingness to carry out a threat if their demands are not met. Bluffing is the art of making others think that you are going to do something when you really have no intention of doing it. As Victor Cha argues,[26] allies fearing abandonment by their patron can end up bluffing their own abandonment of an alliance to elicit greater support from their main ally. We only find out whether blackmail is a bluff if the blackmailer does not carry out its threat in the absence of gains made at the expense of its security patron.

This article argues that populist blackmail accounts for the threats of Presidents Duterte and Erdogan to sever ties with the United States. To confirm the validity of this proposition, however, empirical evidence must demonstrate, first, that Duterte and Erdogan were highly dissatisfied with their US security patron and believed they deserved a better deal. Second, it must show that they attempted to improve their conditions within the alliance by seeking to extract concessions. Third, it should show that their behaviour was not motivated by a genuine will to defect and to realign with China or Russia. Fourth, empirical evidence must demonstrate that both leaders used this foreign-policy issue to rally domestic support around the notion that they were the victims of American interests.

[24]Johannes Plagemann and Sandra Destradi, 'Populism and foreign policy: The case of India', *Foreign Policy Analysis*, 15:2 (2019), pp. 283–301; S. Erdem Aytaç and Ziya Öniş, 'Varieties of populism in a changing global context: The divergent paths of Erdoğan and Kirchnerismo', *Comparative Politics*, 47:1 (2014), pp. 41–59.

[25]Takis S. Pappas, *Populism and Liberal Democracy: A Comparative and Theoretical Analysis* (Oxford: Oxford University Press, 2019).

[26]D. Victor Cha, 'Abandonment, entrapment, and neoclassical realism in Asia: The United States, Japan, and Korea', *International Studies Quarterly*, 44:2 (2000), pp. 261–91.

Alternative arguments

The literature on second-tier states' strategies relies heavily on the propositions of external and internal balancing,[27] bandwagoning,[28] and hedging.[29] External balancing implies that allies will maintain and, possibly, increase their alignment with their security patron to balance against a rising power or threat.[30] Some prefer the term 'loyalty' to describe this phenomenon since, in this case, balancers are already formal allies.[31] In any case, external balancing is a central reason why states such as the Philippines and Turkey joined alliances with the United States in the first place. Balancing does not explain, however, why second-tier powers would show disloyalty by threatening to end the alliance with their security patron and to realign with adversarial powers. Internal balancing, which focuses on enhancing military strength to rely on independent capabilities in response to external threats, does not provide a better explanation of such erratic behaviour.

Bandwagoning generates two interesting alternative propositions to strategic blackmail. According to its primary definition, it is conceptualised as the opposite of balancing. Thus, when confronted with a rising and threatening power, smaller powers, for fear of being attacked or being forced into obedience, will align with that power.[32] In other words, bandwagoning occurs when a state believes that the costs of opposing a threatening revisionist power exceed the anticipated benefits of supporting it. For example, faced with the threat of Germany, Joseph Stalin bandwagoned for security reasons by signing the Non-Aggression Treaty in 1939 and buying himself time by postponing military confrontation. Some research shows, however, that this form of bandwagoning rarely occurs, and that rather than aligning with the source of danger, weak states tend to balance against threatening powers.[33] Yet it has been argued that Philippine president Duterte did bandwagon with Beijing out of fear, and that his rant against the United States was motivated by the will to move closer to a threatening China to avoid confrontation.[34] Was it really the case? Have the Philippines, or Turkey, threatened to break with Washington to initiate a strategic realignment? As Castillo and Downes point out, the literature on bandwagoning does not ask whether, and under which conditions, states may end up exiting an alliance to realign with an imminent threat.[35] This article therefore intends to shed light on this proposition. To confirm this argument, empirical evidence must show that Manila and Ankara perceived China and Russia, respectively, to be existential threats and chose realignment because they did not trust Washington to guarantee their security.

Randall Schweller argues that it is a mistake to narrowly define bandwagoning as 'giving in to threats' and to assume that bandwagoning is the opposite of balancing. He contends that states

[27] Zachary Selden, 'Balancing against or balancing with? The spectrum of alignment and the endurance of American hegemony', *Security Studies*, 22:2 (2013), pp. 330–64; James D. Morrow, 'Arms versus allies: Trade-offs in the search for security', *International Organization*, 47:2 (1993), pp. 207–33; Waltz, *Theory of International Politics*.

[28] Denny Roy, 'Southeast Asia and China: Balancing or bandwagoning?', *Contemporary Southeast Asia: A Journal of International and Strategic Affairs*, 27:2 (2005), pp. 305–22; L. Randall Schweller, 'Bandwagoning for profit: Bringing the revisionist state back in', *International Security*, 19:1 (1994), pp. 72–107.

[29] John D. Ciorciari and Jürgen Haacke, 'Hedging in International Relations: An introduction', *International Relations of the Asia-Pacific*, 19:3 (2019), pp. 367–74; Alexander Korolev, 'Shrinking room for hedging: System-unit dynamics and behavior of smaller powers', *International Relations of the Asia-Pacific*, 19:3 (2019), pp. 419–52; Van Jackson, 'Power, trust, and network complexity: Three logics of hedging in Asian security', *International Relations of the Asia-Pacific*, 14:3 (2014), pp. 331–56.

[30] V. Thazha Paul, *Restraining Great Powers: Soft Balancing from Empires to the Global Era* (New Haven, CT: Yale University Press, 2018); Waltz, *Theory of International Politics*.

[31] J. J. Castillo and A. B. Downes, 'Loyalty, hedging, or exit: How weaker alliance partners respond to the rise of new threats', *Journal of Strategic Studies*, 46:2 (2023), pp. 227–68.

[32] Roy, 'Southeast Asia and China'; John Mearsheimer, *The Tragedy of Great Powers Politics* (New York: W.W. Norton & Company, 2001); Stephen M. Walt, *The Origins of Alliances* (Ithaca: Cornell University Press, 1987); Robert G. Kaufman, 'To balance or to bandwagon? Alignment decisions in 1930s Europe', *Security Studies*, 1:3 (1992), pp. 417–47.

[33] Walt, *Origins of Alliances*; Eric J. Labs, 'Do weak states bandwagon?', *Security Studies*, 1:3 (1992), pp. 383–416.

[34] Ted Galen Carpenter, 'What are the Philippines and Malaysia doing when it comes to China? (It's called bandwagoning)', CATO Institute, 5 November 2016.

[35] Castillo and Downes, 'Loyalty, hedging, or exit'.

bandwagon not to avoid losses but because they are driven by the opportunity for gain.[36] Schweller maintains that 'unthreatened revisionist states … often bandwagon with the stronger revisionist state or coalition for opportunistic reasons',[37] and that 'bandwagoning rarely involves costs and is typically done in the expectation of gain'.[38] Here, weaker states will work on establishing favourable relationships with revisionist powers by aligning with them for profit-seeking rather than for security considerations. For instance, profit motivated Benito Mussolini to bandwagon with Nazi Germany by declaring war on France in 1940 in order to share the spoils of victory with Berlin.[39] Some have argued that Turkey pursued bandwagoning for profit by aligning with Russia in the war in Syria to counter Kurdish separatism and to increase its influence in the conflict.[40] Could President Erdogan's warning to the United States be motivated by bandwagoning for profit? For this theoretical proposition to hold, evidence must show that Duterte's and Erdogan's threats to break with Washington were motivated by expectations of opportunistic gains, such as an increase in power and influence, rendered possible by realignment with non-threatening revisionist powers.

A growing body of work emphasises that secondary states can refrain from adopting balancing or bandwagoning postures by turning instead to a third option: hedging. This strategy attempts to avoid exclusive alignment by relying on 'counterbalancing actions intended to minimize the risk of opting for a single course of action'.[41] Its main objective is to reduce cost exposure in times of systemic uncertainty by avoiding to choose one side over another. By increasing economic cooperation while preparing for military confrontation, the argument goes, hedgers can leave their strategic options open without having to choose between balancing and bandwagoning.[42]

As Haacke explains, however, hedging has become a large residual category that encompasses various strategies that are somewhat contradictory.[43] Since hedgers seek to reduce various types of risks, experts have tended to define hedging as a tangle of actions – diplomatic, economic, political – that carry no apparent costs. The problem is that this broad conceptualisation of hedging, which is often referred to as 'soft hedging',[44] reduces its analytical traction and makes it unfalsifiable. If states could hedge without incurring costs, hedging would be the norm in international relations rather than a specific strategy designed to mitigate security risks.[45]

Along with Lim and Cooper,[46] I argue that hedging must therefore be refined as a concept by limiting its scope to security and defence issues, which are costly by definition and meaningful in their intent. Hedging must be conceptualised as 'a class of behaviors which signal ambiguity regarding great power alignment, therefore requiring the state to make a trade-off between the fundamental (but conflicting) interests of autonomy and alignment'.[47] This is what some have called

[36]L. Randall Schweller, 'Bandwagoning for profit: Bringing the revisionist state back in', *International Security*, 19:1 (1994), pp. 72–107 (p. 74).

[37]L. Randall Schweller, 'New realist research on alliances: Refining, not refuting, Waltz's balancing proposition', *The American Political Science Review*, 91:4 (1997), pp. 927–30 (p. 928).

[38]Ibid., p. 929.

[39]Walt, *Origins of Alliances*.

[40]Ajdin Didic and Hasan Kösebalaban, 'Turkey's rapprochement with Russia: Assertive bandwagoning', *The International Spectator*, 54:3 (2019), pp. 123–38.

[41]Stefanie von Hlatky, *American Allies in Times of War: The Great Asymmetry* (Oxford: Oxford University Press, 2013), p.20; Korolev, 'Shrinking room for hedging'; Evelyn Goh, 'The US–China relationship and Asia-Pacific security: Negotiating change', *Asian Security*, 1:3 (2005), pp. 216–44.

[42]Kei Koga, 'The concept of "hedging" revisited: The case of Japan's foreign policy strategy in East Asia's power shift', *International Studies Review*, 20:4 (2018), pp. 633–60.

[43]Jürgen Haacke, 'The concept of hedging and its application to Southeast Asia: A critique and a proposal for a modified conceptual and methodological framework', *International Relations of the Asia-Pacific*, 19:3 (2019), pp. 375–417.

[44]Koga, 'The concept of "hedging" revisited'.

[45]J. Darren Lim and Zack Cooper, 'Reassessing hedging: The logic of alignment in East Asia', *Security Studies*, 24:4 (2015), pp. 696–727 (p. 703).

[46]Ibid.

[47]Ibid.; James D. Morrow, 'Alliances: Why write them down?', *Annual Review of Political Science*, 3 (2000), pp. 63–83.

Table 1. Hypotheses and confirmation conditions.

Argument	Hypothesis	Confirmation conditions
Populist blackmailing **Bluffing*	Dissatisfied populist leaders threaten to break ranks to compel Washington to make concessions and to bolster domestic support.	Ally dissatisfied with US security patron. Ally requests concessions and threatens realignment. Ally expresses dissatisfaction to domestic audience by highlighting the 'true people'/US imperialist divide to rally popular support. Behaviour not motivated by the will to realign with China or Russia. ** Ally does not carry out threat when demands are not met.*
Bandwagoning	Vulnerable US ally threatens to break ranks to initiate realignment with a revisionist power to avoid being attacked.	Ally fears revisionist great power. Ally does not trust Washington to guarantee its security. Realignment with threatening great power.
Bandwagoning for profit	Opportunistic US ally threatens to break ranks to initiate realignment with a non-threatening revisionist power to make opportunistic gains.	Ally does not fear revisionist great power. Realignment with non-threatening power. Pursued gains must be identified.
Hard hedging	Risk-averse US ally threatens to break ranks to reduce cost exposure by not choosing one side over another.	Ally makes ambiguous diplomatic statements. Contradictory security alignment with Washington *and* with revisionist great power through double security/defence cooperation.

'hard hedging'.[48] It implies that an ally will send security and defence signals at odds with its alliance. For US allies, hedging would imply moving towards a median position between the United States and rival great powers by focusing on double security cooperation,[49] a deliberately ambiguous stance about their intentions to support one side or another in the event of a war. The question is whether the Philippines and Turkey's defiance towards Washington was motivated by the will to minimise the security risks of opting for a single course of action. This is possible. I therefore cast hard hedging as the third alternative explanation.

Some may wonder, however, whether populist blackmail is only a subcategory of hard hedging. To be clear, populist blackmailers threaten their security patron to make gains at its expense, while hard hedgers adopt median security postures to mitigate risks in an uncertain world. Populist blackmail does not require following through with cooperation with the most threatening state, while hedging does. Moreover, contrary to hedging or bandwagoning, populist blackmail is not a state strategy reflected in policy papers and implemented by bureaucratic machinery, but rather a political strategy engineered by populist leaders for their own gains. That said, while blackmail is distinct from hard hedging, it may very well be complementary to it. After all, there are many reasons why populist leaders might want to hedge, with blackmailing one's patron being one of them. Moreover, both could be a response to threats or fears of abandonment. Fear could lead a political figure to double down on its alliance (populist blackmail) or to try and diversify its security portfolio (hedging). Hence, both strategies might very well be pursued simultaneously.

So, which of these arguments best explains our research puzzle? Before testing them against the empirical evidence, I first present their respective hypotheses and confirmation conditions in Table 1.

[48]Koga, 'The concept of "hedging" revisited'; Jeffrey Hornung, 'Japan's growing hard hedge against China', *Asian Security*, 10:2 (2014), pp. 97–122.

[49]Maxandre Fortier and Justin Massie, 'Strategic hedgers? Australia and Canada's defence adaptation to the global power transition', *International Journal*, 78:3 (2023), pp. 1–16.

This article uses controlled comparison as a method of analysis. More specifically, it relies on most different systems design to compare the Philippines and Turkey.[50] These allies have different geographies, languages, cultures, histories, and institutions. The only thing they have in common is the dependent variable: they both had populist leaders who threatened to leave their security patron. I argue that by identifying the circumstances that are common to both cases, we can better understand why they adopted similar behaviour. As the comparison shows, two concomitant factors were present in both cases: political grievances against the United States and lack of strategic assurance from Washington.

President Duterte plays the Chinese card

Under President Benigno Aquino, Rodrigo Duterte's predecessor, the Philippines used various means to pursue a balancing strategy against China. Aquino focused on territorial defence and strengthened security relations with its only formal ally, the United States. He acquired additional military equipment from Washington and signed the Enhanced Defense Cooperation Agreement with the Americans in 2014 to contain China's threat.[51] This agreement complemented the Mutual Defense Treaty, which was signed with Washington in 1951 and gave the United States important access to Philippine air and naval bases. The Philippine government also pursued a legal strategy by bringing the dispute with China over the Spratly Islands in the South China Sea before the Permanent Court of Arbitration in The Hague.

When Rodrigo Duterte came to power in May 2016, the Philippines dropped balancing and underwent a shift in foreign policy. Duterte made it clear that he did not intend to break ties with the United States, but that he would nevertheless pursue open partnership with China and Russia.[52] He attempted to benefit from China's Belt and Road Initiative by obtaining loans and economic aid from Beijing, notably to build drug-rehabilitation centres.[53] As a result, Duterte launched a diplomatic offensive to earn Beijing's confidence and goodwill. This soft-hedging posture (i.e. relying on counterbalancing actions) was not unique to the Philippines, as other countries in the region followed a similar path. South Korea, Thailand, and Australia greatly benefited from their economic partnership with China while remaining firmly committed to their defence alliance with the United States.[54]

United States–Philippines relations took a dramatic turn, however, when the Obama administration criticised President Duterte's 'war on drugs' policy as being a brutal attack on human rights. Duterte had been elected on the promise to eliminate drug problems in the Philippines, by all means necessary, and Washington's criticism was perceived as a clear rebuff of his government's domestic agenda.[55] Obama's criticism triggered President Duterte to adopt a different logic of action. During his first visit to Beijing in October 2016, the Philippine president announced

[50]John Gerring, 'Case selection for case-study analysis: Qualitative and quantitative techniques', in Janet M. Box-Steffensmeier, Henry E. Brady, and David Collier (eds), *The Oxford Handbook of Political Methodology* (Oxford: Oxford University Press, 2008), pp. 645–84; Alexander George and Andrew Bennett, *Case Studies and Theory Development in the Social Sciences* (Cambridge: Belfer Center Studies in International Security, 2005); Adam Przeworski and Henry Teune, *The Logic of Comparative Social Inquiry* (New York: John Wiley and Sons, 1970).

[51]Carl Thayer, 'Analyzing the US–Philippines enhanced defense cooperation agreement', *The Diplomat* (2 May 2014).

[52]J. Richard Heydarian, 'Tragedy of small power politics: Duterte and the shifting sands of Philippine foreign policy', *Asian Security*, 13:3 (2017), pp. 220–36.

[53]Karen Lema, 'Philippines to open giant rehab center soon, funded by China tycoon', *Reuters* (12 October 2016).

[54]Zhong Zhenming and Yang Yanqi, 'Alliance forging or partnership building? China's policy in the Asia-Pacific under the Xi administration', *The International Spectator*, 55:1 (2020), pp. 62–77.

[55]Sheena McKenzie and Kevin Liptak, 'After cursing Obama, Duterte expresses regret', *CNN* (6 September 2016). The United Nations High Commissioner for Human Rights (UNHCHR) reported that between 8,700 and 29,000 people – including children – had been killed since the beginning of President Duterte's war on drugs (UNHCHR, 2020: 5); United Nations High Commissioner for Human Rights (UNHCR), 'Situation of human rights in the Philippines', Report A/HRC/44/22, June 29, 2020.

his separation from Washington and his realignment with Beijing.[56] He doubled down by stating that if China and Russia would create a new world order to replace the current US-dominated one, the Philippines would be the first to join.[57] Then, days later, feeling the pressure and measuring the seismic consequences of his rant, Duterte backtracked by stressing that he did not intend to cut ties with Washington but to end systematic alignment with it.[58] Nonetheless, these statements were followed by multiple decisions that were at odds with the US-alliance relationship. Duterte cancelled several joint military exercises with the United States, banned the US military from building a weapons depot, and prohibited it from using local bases to launch deterrence operations against China.[59] Duterte also threatened to terminate the Visiting Forces Agreement of 1999, which allowed US troops to use the Philippines' military bases. How can we make sense of such a rapid change of posture?

President Duterte's forceful and public challenge to Washington can be attributed to the deeply ingrained nature of his leadership style rooted in populism. During the 2016 presidential election, Duterte positioned himself as the underdog poised to reclaim the sovereignty of the Philippines, which he perceived as having been taken away by the corrupted 'imperial Manila' elites.[60] Once in power, he skillfully harnessed both right-wing and left-wing ideological elements to gather support from a diverse array of domestic constituencies. He portrayed himself as a champion of the left while simultaneously earning the label 'penal populist' due to his 'law and order' orientation and strongman rhetoric against drugs and criminals.[61] Through extrajudicial measures, martial law declarations, and the arrest of his main legislative rival, Duterte dismantled political opposition, causing a significant institutional imbalance that vested him as the sole architect of foreign policy.

Despite his crackdown on opponents, Duterte emerged as the most popular president in the country's history.[62] He skillfully tapped into the prevailing 'politics of anger' by criticising those abroad who opposed his domestic agenda on behalf of the true people. Drawing from his anti-Western ideological background, Duterte effectively channelled Filipinos' frustration towards what they perceived as US imperialism. A 2019 survey revealed that only 32.4% of Filipino respondents expressed confidence in the United States as a strategic partner and security guarantor.[63] Within this context, Duterte effectively relied on a 'us-versus-them' populist narrative, portraying the United States as a hostile colonial power, a sentiment notably exemplified in his 2017 state of the nation address.

Political grievance and perceived lack of security assurance

From the outset of his presidency, Rodrigo Duterte entertained negative perceptions of the United States, which led him to express a strong narrative for an independent foreign policy. The continued presence of American troops following the country's independence in 1946 was perceived by many, including by Duterte himself, as 'residual colonialism'.[64] Many Filipinos felt that their

[56] Jane Perlez, 'Rodrigo Duterte gets closer to China, and the neighbors notice', *New York Times* (24 October 2016).

[57] 'Philippines' Duterte threatens to follow Russia in quitting International Criminal Court', *Associated Press* (17 November 2016).

[58] Cris Larano and Chun Han Wong, 'Philippine president Duterte seeks to clarify call for "separation" from U.S.', *Wall Street Journal* (21 October 2016).

[59] Heydarian, 'Tragedy of small power politics'.

[60] Destradi and Plagemann, 'Populism and International Relations'.

[61] Bulent Kenes, 'Rodrigo Roa Duterte: A jingoist, misogynist, penal populist', European Center for Populism Studies, 17 September 2020.

[62] Ibid.

[63] Tang Siew Mun, Moe Thuzar, Hoang Thi Ha, Termsak Chalermpalanupap, Pham Thi Phuong Thao, and Anuthida Saelaow Qian, 'The state of Southeast Asia: 2019 Survey Report', 2019, available at: {https://www.iseas.edu.sg/wpcontent/uploads/pdfs/TheStateofSEASurveyReport_2019.pdf}.

[64] B. Mark Manantan, 'Pivot toward China: A critical analysis of the Philippines' policy shift on the South China Sea disputes', *Asian Politics & Policy*, 11:4 (2019), pp. 643–66 (p. 648).

country was not considered as an equal by the United States in diplomatic meetings, and this lack of consideration partly explains why Duterte wanted to distance himself from Washington.[65]

But it was the Obama administration's criticism of his government's extrajudicial killings and human rights violations that triggered President Duterte's public defiance. Not only was Duterte upset because of US criticisms, but the Obama administration cancelled a shipment of weapons and postponed the renewal of the $400 million Millennium Challenge Corporation (MCC) aid package as a response to his human rights violations.[66] In reaction, President Duterte declared: 'Instead of helping us, the first to hit was the State Department … So you can go to hell, Mr. Obama, you can go to hell.'[67] He added: 'Who does [Obama] think he is? I am no American puppet. I am the president of a sovereign country and I am not answerable to anyone except the Filipino people.'[68] From that point on, Duterte's approach became vehemently hostile to the United States.[69] He indicated that he would not visit Washington[70] and that he wanted American troops out of the country.[71] He also ended up insulting President Obama by calling him offensive names, which resulted in Washington cancelling a meeting between the two heads of state.[72]

Duterte was also under the impression that the United States would eventually abandon the defence of the Philippines, a perception that fuelled resentment. The issue of abandonment was closely associated with the Philippines' territorial dispute in the South China Sea. Beijing claims historic rights and sovereignty over several islands, reefs, shoals, and waters of the region, including within the Philippines exclusive economic zone. Chinese activities in these waters were serious security threats for Manila.[73] In July 2016, the Permanent Court of Arbitration rendered a decision and agreed with the Philippines' claims.[74] This was a huge victory for the Philippine government. Yet Duterte underplayed that victory to avoid further tensions with China because he seriously doubted Washington's willingness to back up his military in case of a confrontation.[75] A year prior to his presidential run, Duterte was already vocal about his stance regarding America's inaction in the South China Sea, stating 'if America cared, it would have sent its aircraft carriers and missile frigates the moment China started reclaiming land in contested territory, but no such thing happened'.[76]

The Mutual Defense Treaty ratified in 1951 stipulates that the United States would assist the Philippines in case of an attack, but it was unclear whether the agreement applied to the territorial dispute in the South China Sea. On several occasions, US executive officials refused to clarify this point and remained equivocal.[77] The 2014 Enhanced Defense Cooperation Agreement did not

[65]C. Julio Teehankee, 'Duterte's resurgent nationalism in the Philippines: A discursive institutionalist analysis', *Journal of Current Southeast Asian Affairs*, 35:3 (2016), pp. 69–89.

[66]Heydarian, 'Tragedy of small power politics'.

[67]Richard Paddock, 'Rodrigo Duterte, Philippines' leader, says Obama "can go to hell"', *New York Times* (5 October 2016).

[68]Alfred W. McCoy, 'Rupture in Philippine–U.S. relations: Geopolitical implications', *The Journal of Asian Studies*, 75:4 (2016), pp. 1049–53.

[69]C. Renato De Castro, 'Explaining the Duterte administration's appeasement policy on China: The power of fear', *Asian Affairs: An American Review*, 45:3–4 (2018), pp. 165–91; Ben Blanchard, 'Duterte aligns Philippines with China, says US has lost', *Reuters* (20 October 2016).

[70]Perlez, 'Rodrigo Duterte gets closer to China'.

[71]Motoko Rich, 'Rodrigo Duterte, in Japan, calls for US troops to exit Philippines in 2 years', *New York Times* (26 October 2016).

[72]Manuel Mogato, 'Duterte, Obama shake hands and chat after rift over insult', *Reuters* (8 September 2016).

[73]National Security Council, 'National Security Strategy 2018', Republic of the Philippines, Manila, 2018, pp. 63–4.

[74]Tribunal arbitral de l'UNCLOS, 'In the matter of the South China Sea arbitration', PCA Case Nº 2013–19, Award, 12 July 2016.

[75]National Security Council, 'National Security Strategy 2018'; Mikael Weissman, 'Understanding power (shift) in East Asia: The Sino-US narrative battle about leadership in the South China Sea', *Asian Perspective*, 43:2 (2019), pp. 223–48; Karen Lema, 'Philippines urges amicable approach to Beijing over South China Sea', *Reuters* (11 September 2020).

[76]Manantan, 'Pivot toward China', p. 647.

[77]Heydarian, 'Tragedy of small power politics'.

provide guarantees on this crucial element either.[78] As Richey points out, 'the Philippines dreads both US abandonment (leaving Manila alone to counter Beijing in the SCS) and entrapment/entanglement (if Washington demands the Philippines press hard on China's SCS claims and this spirals into conflict)'.[79]

As a result, Manila cancelled numerous patrols with Washington in the South China Sea. Duterte explained his decision by saying that the Philippines was pushed to provoke Beijing without an actual guarantee of American strategic support.[80] For Duterte, it was clear that 'America will never die for the Philippines'.[81] A survey conducted in late 2016 showed that half of the Philippine population disagreed or was undecided as to whether a defence alliance with the United States had been beneficial to the country.[82] Moreover, there were serious doubts about Washington's military support. While the Philippines was the largest recipient of US foreign military aid in Southeast Asia, this support constantly declined despite President Obama's 2011 strategic pivot to Asia.

Duterte pursued a dual objective by engaging in blackmail against Washington. First, he publicly and emotionally vented his personal grievances against the United States, while hoping that Washington would cease any intervention in the Philippines' internal politics, especially through coercive tactics, and would explicitly commit to defending the Philippines should a confrontation with China arise over contested maritime areas in the South China Sea. Second, by boldly defying Washington, Duterte was playing to his domestic audience as much as he was addressing the United States. He recognised that his alleged break with Washington would resonate with a significant portion of the Philippine population, enabling him to maintain and potentially increase his domestic support.[83]

The combined effect of political grievance and lack of security assurance prompted him to announce his realignment with China in an untimely manner. This was a political outburst rather than a thoughtful strategy, as no serious discussions with Beijing had been conducted prior to the rant. Their territorial disputes in the South China Sea were nowhere near resolved, and cooperation between Manila and Beijing on security and defence was simply non-existent. Duterte's blackmail was the perfect illustration of the personalisation of foreign policymaking under a populist regime. He gambled with his foreign policy towards Washington and used it for domestic political consumption.[84]

Assessing competing arguments

President Duterte feared China's maritime actions, and he did not trust that Washington would defend his country in case of a Chinese attack in contested waters. One may therefore argue that this was fertile ground for bandwagoning. However, despite Duterte having cancelled joint military exercises with Washington, including numerous patrols in the South China Sea, the Philippines did not terminate its alliance with the United States, and it did not realign with China. As stated above, no security or defence agreement was ever signed with Beijing. This was not bandwagoning. Moreover, despite doubts about US commitment over territorial disputes in the South China Sea,

[78] Jiyun Kih, 'Capability building and alliance cohesion: Comparing the US–Japan and US–Philippines alliances', *Australian Journal of International Affairs*, 74:4 (2019), pp. 355–376.

[79] Mason Richey, 'US-led alliances and contemporary international security disorder: Comparative responses of the transatlantic and Asia-Pacific alliance systems', *Journal of Asian Security and International Affairs*, 6:3 (2019), pp. 275–98 (p. 285).

[80] De Castro and Renato, 'Explaining the Duterte administration's appeasement policy on China'.

[81] Manantan, 'Pivot toward China', p. 647.

[82] Heydarian, 'Tragedy of small power politics'.

[83] Christine B. Tenorio, Patrik K. Meyer, and Achmad Nurmandi, 'President Duterte's bicephalous leadership: Populist at home – pragmatic abroad', *Asian Journal of Comparative Politics*, 7:1 (2022), pp. 58–72; Giulio Pugliese, Francesca Ghiretti, and Aurelio Insisa, 'Italy's embrace of the Belt and Road Initiative: Populist foreign policy and political marketing', *International Affairs*, 98:3 (2022), pp. 1033–51; Teehankee, 'Duterte's resurgent nationalism in the Philippines'.

[84] Weiqing Song and Joseph Ching Velasco, 'Selling "independent foreign policy" amid the US–China rivalry: Populism and Philippine foreign policy under the duterte government', *The Pacific Review*, p. 4 (online 23 October 2022).

the Philippines was still protected by the Mutual Defense Treaty and by the Enhanced Defense Cooperation Agreement, which had been signed by previous governments. Evidence also rejects the bandwagoning-for-profit argument for two main reasons. First, Manila did not see China as a non-threatening revisionist power – quite the opposite. Second, it did not realign with China to make opportunistic gains. Rather, months before Duterte's break with Washington, he was using a soft-hedging strategy, leading a diplomatic offensive to earn China's goodwill and take advantage of its economic windfall, but at the same time, not questioning Manila's defence ties with Washington. The hard-hedging argument does not stand up any better. While Duterte announced that he would pursue closer ties with China, and while he may have explored security options with Beijing in the first months of his presidency, his rapprochement was limited to diplomatic and economic policy. Since no security agreement was reached, Manila did not benefit from double security cooperation with both great powers to mitigate risks. Hence, empirical evidence tends to reject the three alternative arguments as their confirmation conditions are either partly or totally absent.

Events that followed President Duterte's controversial statement further substantiate our assertion that his actions were motivated by populist blackmail. First, his statements were made to the surprise of most in the Philippines, including his own cabinet officials.[85] Second, his threat was met with disapproval from the Philippine defence establishment. As Song and Velasco put it, 'Philippine military officials who spent most of their careers collaborating with US forces in combatting Islamist insurgents were not necessarily comfortable with the sudden shift in foreign policy'.[86] Third, official policy documents released after President Duterte's election do not indicate a leaning towards hard hedging or bandwagoning. The Philippines' 2018 National Security Strategy, for instance, remained in line with the country's traditional strategic positions, as if the shift that was publicly announced by the Philippine president a year earlier had never existed. This document stated that 'a continuing US security presence in the Asia Pacific is a stabilizing force, particularly with the growing complexity of security challenges that confront the region.' It also reiterated that the United States was 'the sole defense treaty ally of the Philippines' and declared that 'the Philippines will work closely with the US on a whole range of issues, including shared security and economic concerns'.[87] As for China, the National Security Strategy did not portray it as a partner; far from it. The document stated that China's fast economic rise resulted in its 'military aggressiveness in Asia', which generated concerns in East Asia and among Association of Southeast Asian Nations (ASEAN) countries due to 'territorial claims in the WPS [West Philippines Sea] and the SCS [South China Sea]'.[88] Security agreements with Washington remained untouched, while a military alliance with China was 'pure fiction'.[89]

The fact that the Philippines remained in line with Washington and that its official policy documents did not send signals at odds with its US alliance suggests that Duterte was bluffing and that the blackmail was associated with him personally. It also suggests that his regime was somewhat backpedalling on his controversial statements. Hence, the problem for the US administration was not to manage the Philippine state but Duterte himself. That being said, blackmail turned out to be successful. As economic relations between Beijing and Manila intensified in 2016 and 2017, Washington did make concessions to the Philippines. First, it stopped criticising President Duterte's domestic agenda and lifted sanctions. The United States increased its foreign aid, making its largest contribution to the Philippines in almost 20 years. Moreover, the Trump administration tried to reset relations by changing Washington's tone. Trump notably praised Duterte's war on drugs by saying that he was doing an 'unbelievable job'.[90] Second, during his 2019 visit to Manila,

[85] Heydarian, 'Tragedy of small power politics'.
[86] Song and Velasco, 'Selling "independent foreign policy"', p. 16.
[87] National Security Council, 'National Security Strategy 2018', pp. 63–4.
[88] National Security Council, 'National Security Strategy 2018', p. 64.
[89] Heydarian, 'Tragedy of small power politics', p. 233.
[90] Joshua Berlinger and Elise Labott, 'Trump praises Duterte's deadly drug war in leaked transcript', *CNN* (24 May 2017).

Secretary of State Pompeo reassured the Duterte government by clarifying Washington's commitment to defending the Philippines over the South China Sea dispute. He stressed that 'any armed attack on Philippine armed forces, public vessels, or aircraft in the SCS will trigger Article IV of the Mutual Defense Treaty'.[91] Such a clear commitment at a time when China was building artificial military islands in the South China Sea had never before been expressed by the United States.[92] Would Duterte's blackmail have been successful if Hillary Clinton had won the presidency in 2016? It is hard to say. However, evidence suggests that Donald Trump was a little more like-minded with Duterte than was President Obama, which may have made it easier for him to make concessions.

Moreover, since his 2016 announcement that he realigned with China, President Duterte fully reinstated Manila's security relations with the United States, including multiple defence agreements and joint military exercises. Duterte also worked hard to rebuild trust with the White House.[93] At the end of President Duterte's six-year term in 2022, the Philippines had not yet established a formal economic partnership with China, despite significant improvement of bilateral relations under his presidency. This is mainly due to the fact that Beijing and Manila could not overcome their disputes over the islands and reefs in the South China Sea.

By playing the Chinese card without ever carrying out his threat of breaking his ties with Washington, Duterte reminded the United States of the strategic value of the Philippines. As Manantan points out, 'the Duterte government has capitalized on China's willingness to engage the Philippines in ways that Manila could then leverage against its defense burden-sharing relationship with the United States'.[94] By taking a calculated risk of alienating his only formal ally, Duterte played big and won. He managed to maximise the Philippines' bargaining power with the United States, while receiving Chinese foreign economic aid.

President Erdogan plays the Russian card

Turkey formally joined NATO in 1952. Since then, there have been numerous disagreements between Washington and Ankara, including on Cyprus, the Iraq War, and sanctions against Iran. But it is the US support to Kurdish militia groups in northern Syria and the Obama administration's passivity towards the attempted military coup against the Erdogan regime in 2016 that most exacerbated these tensions. They increased the insecurity of the Turkish government and bolstered political resentment against Washington.[95] These tensions culminated in a 2018 op-ed published in the *New York Times* in which President Erdogan publicly threatened to abandon the United States. He wrote that unless Washington was more respectful of Turkey and stopped taking Ankara for granted, Turkey could find new friends and allies. These were not empty words. They were embodied in Ankara's decision to move closer to Russia and Iran in the Syrian conflict and to purchase Russia's S-400 anti-aircraft missile system as a stand-alone weapon for $2.5 billion. President Erdogan had also threatened to close the Incirlik air base, which hosts US nuclear warheads, and to shut down the Kurecik radar station, which is mainly operated by NATO.[96]

Similar to Rodrigo Duterte, Erdogan's populism significantly impacted Turkey's foreign policy. He consistently positioned himself as an outsider, relying on an anti-establishment appeal.[97] Like Duterte, President Erdogan hailed from an anti-Western ideological background, intensifying his government's mistrust of the West. Over time, he managed to distance Turkey from its

[91] Karen Lema and Neil Jerome Morales, 'Pompeo assures Philippines of U.S. protection in event of sea conflict', *Reuters* (1 March 2019).

[92] Regine Cabato and Shibani Mahtani, 'Pompeo promises intervention if Philippines is attacked in South China Sea amid rising Chinese militarization', *Washington Post* (28 February 2019).

[93] Derek Grossman, 'Duterte's alliance with China is over', RAND Corporation, 2 November 2021.

[94] Ibid., p. 648.

[95] E. Fuat Keyman, 'A new Turkish foreign policy: Towards proactive "moral realism"', *Insight Turkey*, 19:1 (2017), pp. 55–69.

[96] 'Turkey could close Incirlik air base in face of US threats: Erdogan', *Reuters* (15 December 2019).

[97] Antonino Castaldo, 'Populism and competitive authoritarianism in Turkey', *Southeast European and Black Sea Studies*, 18:4 (2018), pp. 467–87.

traditional Western partners and embraced an anti-Western populist narrative. Erdogan's rhetoric vilified the Western world and the domestic-elite segments influenced by Western culture, while emphasising the moral and religious virtue of the Turkish people.[98] He maintained a narrative of victimhood, depicting the Muslim Turkish nation as under siege from Western powers and their domestic collaborators.[99] He frequently accused the United States and the European Union of acting as adversaries of Islam and presenting himself as the sole interpreter of the people's concerns and demands.[100] Erdogan's views aligned well with his Justice and Development Party (AKP), which upholds a 'thick' Muslim nationalist ideology.[101] The AKP's political discourse was founded on a populist dichotomy between the Western, modern 'elite' and the more traditional Turkish people.[102]

Meanwhile, throughout the 2010s, the Erdogan regime gained greater control over Turkish institutions, including the courts. These institutions lost their ability to limit the power of the executive branch of government. Erdogan also progressively marginalised professional diplomats by turning to political appointees. He created new diplomatic agencies under his direct authority to work around the Foreign Ministry. This significantly undermined its autonomy. The full personalisation of Turkey's politics was then formalised with the 2018 elections. As Hakki Tas points out, it 'sealed Turkey's transition into a presidential system. The new system established a hyper-empowered presidency with no solid checks and balances, largely eradicating the separation of powers, turning the parliament to a rubber-stamp institution, and allowing Erdogan to rule the country by decree.'[103]

Concurrently, the deterioration of the relations with Washington pushed Turkish anti-American sentiment to a peak.[104] According to a 2016 national survey, 88 percent of surveyed Turks believed that the United States had not approached Turkey in a friendly manner.[105] The anti-American rhetoric in the pro-government media also became increasingly bitter and hostile towards Washington.[106] By warning the Americans that Turkey could find new friends and allies, President Erdogan played to his domestic audience as much as to the United States and consolidated his domestic support.

Furthermore, using controlled comparison, an in-depth examination of the Turkish case reveals the presence of the same two concomitant factors observed in the Philippines: political grievances and the perceived lack of security guarantees.

Grievance and lack of security assurance, yet again

By 2014, Turkey had come to see Kurdish militia groups in Syria as the most imminent threat to its territorial integrity.[107] The problem was that, following the fall of Kobane, Kurdish forces in Syria became partners of the United States against Daesh. US Defense Secretary Ashton Carter

[98] Destradi and Plagemann, 'Populism and International Relations'.

[99] Burak Bilgehan Özpek and Nebahat Tanriverdi Yaşar, 'Populism and foreign policy in Turkey under the AKP rule', *Turkish Studies*, 19:2 (2018), pp. 198–216.

[100] Bilge Yabanci, 'Populism as the problem child of democracy: The AKP's enduring appeal and the use of meso-level actors', *Southeast European and Black Sea Studies*, 16:4 (2016), pp. 599–600.

[101] Kakki Tas, 'The formulation and implementation of populist foreign policy: Turkey in the eastern Mediterranean', *Mediterranean Politics*, 27:5 (2022), pp. 563–87.

[102] Ayhan Kaya, Max-Valentin Robert, and Ayse Tecmen, 'Populism in Turkey and France: Nativism, multiculturalism, and Euroskepticism', *Turkish Studies*, 21:3 (2020), pp. 361–91; Tas, 'The formulation and implementation of populist foreign policy', p. 569.

[103] Ibid., pp. 569–70.

[104] Ragip Soylu, 'Anti-US sentiment in Turkey reached a new high, poll shows', *Middle East Eye* (1 February 2019).

[105] Lisel Hintz and David E. Banks, 'Symbolic amplification and suboptimal weapons procurement: Explaining Turkey's S-400 program', *Security Studies*, 31:5 (2022), pp. 826–56 (p. 848).

[106] Nicholas Danforth, 'Rising anti-Americanism in Turkey', Bipartisan Policy Center, 7 February 2018.

[107] Patrick Kingsley, 'Who are the Kurds, and why is Turkey attacking them in Syria?' *New York Times* (14 October 2019); G. Lenore Martin, 'Analysing a tumultuous relationship: Turkey and the US in the Middle East', *Asian Journal of Middle Eastern and Islamic Studies*, 13:2 (2019), pp. 262–77.

had famously described the People's Protection Units (YPG), a Kurdish militia, as one of the most effective and motivated anti-Daesh ground forces in Syria.[108] Erdogan saw this partnership as a betrayal by Washington, and his repeated appeals to the Obama and Trump administrations to stop supporting the YPG were in vain.[109] The Turkish president was upset with his Western allies, and with Washington in particular, for not taking the Kurdish problem seriously enough and for not giving Turkey's national interests significant attention. In the eyes of Erdogan, the partnership between the Pentagon and the Kurds proved that Washington would not defend Ankara's territorial integrity against the Kurdistan Workers' Party (PKK).[110] On the domestic front, Erdogan framed the Syrian war, and Washington's support to the YPG, as a strategic manoeuvre by Western imperialist forces to fragment and exert control over the Middle East.[111]

President Erdogan also suspected that the United States was behind the 2016 attempted military coup against his regime. This suspicion poisoned the relationship between the two countries and seriously affected their bond of trust.[112] In the aftermath of the coup attempt, President Erdogan condemned his Western allies for 'failing to show solidarity with Turkey'.[113] Influential members of the Turkish government, such as the Minister of the Interior Suleyman Soylu, even publicly accused the United States of being behind the failed coup, and Europe of being 'enthusiastic about it'.[114] Turkey accused the Obama administration of supporting Fethullah Gülen, a Turkish cleric living in Pennsylvania, whom Ankara considered to be the leader of the attempted coup.[115] The State Department denied the accusation and declared that 'unfounded and irresponsible claims of US responsibility for events in Turkey are inconsistent with Turkey's status as a NATO Ally and strategic partner of the United States'.[116] The refusal of the Obama administration to extradite Fethullah Gülen, and Washington's open criticisms of President Erdogan's authoritarianism and human rights violations in the post-putsch era, reinforced the impression that the United States and other Western allies had abandoned Turkey.[117]

The issue of missile defence reinforced this belief. Ankara had initially considered buying Patriot missiles from its NATO allies to meet urgent security needs generated by the Syrian conflict.[118] In exchange, Turkey asked for technology transfer, which was denied by the Obama administration due to human rights violations and the authoritarian drift of the Erdogan regime.[119] This led President Erdogan to accuse Washington and NATO of imposing an arms embargo on Turkey. The Turkish foreign minister declared: 'we are forced to cooperate with other partners in buying and selling weapon systems, because there are NATO allies who refuse to sell us air defense systems or share (technology) with us'.[120]

These events led the Turkish government to send several signals at odds with its NATO alliance. President Erdogan signed a strategic agreement with Russia and Iran through the Astana process

[108] Ajdin Didic and Hasan Kösebalaban, 'Turkey's rapprochement with Russia: Assertive bandwagoning', *The International Spectator*, 54:3 (2019), pp. 123–38.

[109] Martin, 'Analysing a tumultuous relationship'.

[110] Lars Haugom, 'Turkish foreign policy under Erdogan: A change in international orientation?', *Comparative Strategy*, 38:3 (2019), pp. 206–23.

[111] Destradi and Plagemann, 'Populism and International Relations'.

[112] Tim Arango and Ceylan Yeginsu, 'Turks can agree on one thing: U.S. was behind failed coup', *New York Times* (2 August 2016).

[113] Tulay Karadeniz and Mumeyra Pamuk, 'Turkey's Erdogan slams West for failure to show solidarity over coup attempt', *Reuters* (29 July 2016).

[114] 'Turkish minister says U.S. behind 2016 failed coup – Hurriyet', *Reuters* (4 February 2021).

[115] Didem Gulmez, 'The resilience of the US–Turkey alliance: Divergent threat perceptions and worldviews', *Contemporary Politics*, 26:4 (2020), pp. 475–92.

[116] Reuters, 'Turkish minister says U.S. behind 2016 failed coup – Hurriyet', *Reuters*, 4 February 2021.

[117] Martin, 'Analysing a tumultuous relationship'.

[118] Sıtkı Egeli, 'Making sense of Turkey's air and missile defense merry-go-round', *All Azimuth*, 8:1 (2019), pp. 69–92.

[119] Gulmez, 'The resilience of the US–Turkey alliance'.

[120] Egeli, 'Making sense of Turkey's air and missile defense', p. 13.

initiated in January 2017.[121] By becoming Russia and Iran's partner in Syria, Turkey could better secure its border, suppress Kurdish political ambition, and achieve greater political influence in the resolution of the Syrian crisis.

This rapprochement with Russia was a direct consequence of mutual distrust between Turkey and its Western allies. As Egeli summarises, 'Washington had lost confidence in Turkey as a proficient and dependable ally under AK Party rule. Turkey's steady drift toward authoritarianism made matters worse. Negative perceptions and mistrust were reciprocal.'[122] Erdogan also led the charge at the United Nations against the anti-Iran and pro-Israel initiatives of the United States, and Turkey became the first NATO member to join the Shanghai Cooperation Organization as a dialogue partner by stressing its common destiny with Asian countries.[123]

In addition, tensions with the Obama administration and NATO over missile defence technology transfer convinced Turkey to turn to Russia for assistance. Relations between Ankara and Moscow had warmed since Erdogan became president in 2014, and especially after the 2016 military coup attempt. While the Obama administration had been slow to react to the attempted putsch, Russian President Vladimir Putin immediately gave Erdogan and his government his unconditional support. Three weeks later, President Erdogan visited Moscow, and President Putin expressed his interest in selling his S-400 system to Turkey. In early 2017, Turkey's defence minister announced that Turkey would purchase the S-400 as a stand-alone weapon and that it would not seek inter-operability with NATO. The deal was ultimately concluded in September 2017.[124] When journalists pushed Erdogan on the issue of NATO inter-operability and alliance loyalty, the President responded, 'nobody has the right to discuss the Turkish republic's independence principles or independent decisions about its defense industry'.[125] This was a defiant move and a warning that Turkey was an independent country that could enter into new partnerships and alliances in case of need. The choice of buying Russian missiles was a political and symbolic one, however. The fact that the S-400 contract did not ultimately include technology transfer to Turkey suggests that the purchase was more an act of defiance towards Washington than a sound strategic move.[126]

This sequence of US–Turkey tensions worsened even more over President Erdogan's refusal to release a jailed American pastor, Andrew Brunson, at the strong request of the Trump administration. Ankara claimed that the pastor was involved in the 2016 coup attempt, while the White House believed it was nonsense. This resulted in President Trump's sanctioning of two Turkish ministers and the adoption of significant tariffs on Turkey's aluminium and steel exports to the United States, which weakened the Turkish currency.[127]

This litany of grievances led President Erdogan to publicly express his frustrations with his American ally and plead for US concessions in the *New York Times* in the summer of 2018. Erdogan bluntly wrote:

> The United States has repeatedly and consistently failed to understand and respect the Turkish people's concerns. And in recent years, our partnership has been tested by disagreements. … Unless the United States starts respecting Turkey's sovereignty and proves that it understands the dangers that our nation faces, our partnership could be in jeopardy. … Before it is too late, Washington must give up the misguided notion that our relationship can be asymmetrical

[121]Charles Thépaut, 'The Astana process: A flexible but fragile showcase for Russia', The Washington Institute for Near East Policy, 28 April 2020; Sinem Cengiz, 'Assessing the Astana peace process for Syria: Actors, approaches, and differences', *Contemporary Review of the Middle East*, 7:2 (2020), pp. 200–14; Haugom, 'Turkish foreign policy'.

[122]Egeli, 'Making sense of Turkey's air and missile defense', p. 13.

[123]Gulmez, 'The resilience of the US–Turkey alliance'.

[124]Carlotta Gall and Andrew Higgins, 'Turkey signs Russian missile deal, pivoting from NATO', *New York Times* (12 September 2017).

[125]Ibid.

[126]Hintz and Banks, 'Symbolic amplification and suboptimal weapons procurement'.

[127]Carlotta Gall and Jack Ewing, 'Tensions between Turkey and U.S. soar as Trump orders new sanctions', *New York Times* (10 August 2018).

> and come to terms with the fact that Turkey has alternatives. Failure to reverse this trend of unilateralism and disrespect will require us to start looking for new friends and allies.[128]

This threat did not explicitly refer to Russia as an alternative ally, but it certainly implied it, especially given the purchase of Russia's S-400 missile system and its flexible alliance with Moscow in the Syrian war concluded a year earlier. By giving such a public warning, President Erdogan was hoping that the United States would cease its support for Kurdish militias in Syria and provide military support to protect Turkey's territorial integrity against the Kurdish threat. Similar to the case of the Philippines under Duterte, blackmail was the product of the personalisation of foreign policymaking under Erdogan. He used Turkey's alliance with the United States as leverage, framing the tensions with Washington for domestic political purposes.[129]

Which theoretical proposition works best?

Evidence suggests that President Erdogan relied on populist blackmail to compel concessions from the United States, as he was deeply dissatisfied with the US and NATO. The controlled comparison shows that grievance and the lack of security guarantees were the concomitant factors associated with blackmail. Contrary to the Philippine case, however, Turkey announced neither a strategic break from Washington nor a realignment with a rival power; it simply threatened to do so. No realignment with Russia came out of the president's warning. Moreover, official Turkish policy documents issued following the failed coup attempt against the Erdogan regime underscored the importance of NATO to Turkey's security and its support for the organisation, which suggests a certain degree of tension between the president and his security and defence establishment despite the centralisation and personalisation of Turkey's foreign policy under Erdogan.[130]

The empirical analysis also shows that bandwagoning fails to account for Ankara's behaviour. President Erdogan did not perceive Russia as an imminent threat, and he did not realign with it by leaving the United States behind. Turkey remained a US ally and a NATO member. Bandwagoning for profit does not provide a better explanation. Ankara's threat to break ranks with Washington was not motivated by a realignment with Russia to make opportunistic gains. The same can be said about hard hedging. Erdogan's warning did not prompt a double security cooperation with Russia and the United States to mitigate risks in an uncertain world.

However, if we broaden our investigation by looking at the whole sequence of events leading up to Erdogan's warning, then bandwagoning for profit and hard hedging offer convincing explanations. In buying the Russian S-400 without inter-operability with NATO, Turkey relied on Russia to hedge its security bets against Kurdish nationalist threats. It was a decision that was clearly at odds with its NATO alliance relationship, and it initiated a double defence cooperation with both Washington and Moscow. The same year, Turkey relied on bandwagoning for profit by reaching a strategic agreement with Russia in Syria. It was not pure realignment with Moscow, but Ankara came to realise that Russia was an effective power and that closer alignment with it could bolster Turkey's geostrategic gains in Syria.[131] In this context, Erdogan's strategic blackmail was in line with prior hard-hedging and bandwagoning-for-profit decisions. As tensions with Washington mounted following these strategic decisions, Ankara essentially doubled down on its alliance with Washington by adding blackmail to its already diversified strategic portfolio.

Turkey's blackmail was only partially successful. Ankara obtained guarantees from the United States that it would stop directly supporting Kurdish militias in Syria, which it did. This concession,

[128] Erdogan, 'How Turkey sees the crisis'.

[129] Weiqing and Ching Velasco, 'Selling "independent foreign policy"', p. 4.

[130] Haugom, 'Turkish foreign policy'.

[131] We should not read too much into Erdogan's strategic rapprochement with Russia. Relations between Ankara and Moscow remained volatile over several issues, including their differences in the Caucasus and Libya. Erdogan ended up using this partnership with Russia to give more weight to its Syrian strategy, but certainly not to replace the United States by formally realigning with Moscow.

however, aimed at improving relations with Ankara more than at preventing Turkey's defection from NATO. In fact, the Trump administration sensed that President Erdogan's warning was a bluff because it did not believe that Turkey had a credible alternative to replace NATO.[132] Even the Russians did not believe Erdogan's veiled threats to break with NATO. As a member of the defence and security committee of the upper house of the Russian parliament indicated following Erdogan's threat, 'we're not building illusions along with these relations'.[133]

Concurrently, Washington kept economic pressure on Turkey, including economic sanctions and trade tariffs, to force Erdogan to free US pastor Andrew Brunson. The economic pressure ultimately forced Ankara to release the pastor two months after President Erdogan had threatened to break with the United States.[134] Then, as Turkish forces pushed back on Kurdish militias in Syria in 2019, President Trump urged Erdogan to 'not be a fool' and even threatened to 'destroy the Turkish economy' if the invasion of Syria went too far.[135] The official letter sent by President Trump to President Erdogan read as follows: 'You don't want to be responsible for slaughtering thousands of people, and I don't want to be responsible for destroying the Turkish economy – and I will. I've already given you a little sample with respect to Pastor Brunson'.[136]

Once again, if we broaden our investigation, Turkey's hard-hedging strategy ended up being costly, as theoretically expected. When the Russian S-400 missiles were delivered in the summer of 2019, the Trump administration instantly removed Turkey from the F-35 Joint Strike Fighter program. By 2020, most Turkish companies that were part of the supply chain of the production of the F-35 had lost their contracts.[137] Moreover, Ankara was hit with the Countering America's Adversaries through Sanctions Act for the purchase of the S-400.[138]

In sum, Turkey obtained partial gains from the United States. The Trump administration ended its direct support to Kurdish militias in Syria, but it did not provide Turkey with military support to protect its territorial integrity against the Kurds.

Conclusion

This article contributes to the literature on populism on foreign policy, alignment, and intra-alliance politics by shedding light on the importance of US allies' populist blackmail amidst the resurgence of great power rivalries. It effectively demonstrates that the defiant behaviour of populist presidents Duterte and Erdogan was not a genuine push for realignment with Beijing and Moscow, but rather a political strategy to leverage concessions from the United States and score political points at home. This insight provides valuable understanding of the complex dynamics and motivations behind US allies run by populist figures and sheds light on the foreign-policy effects of populism.

Through inductive analysis, using the controlled comparison method of most different systems design, the article also demonstrates that the same concomitant factors – political grievances and the perceived lack of security guarantees – were present when President Duterte and Erdogan threatened to break ranks with the United States. This suggests that the combined effect of these factors drove them towards populist blackmail. However, further research is required to confirm

[132] Alex Lockie, 'Turkey's president threatened a major blow to the US – but Trump looks to have called his bluff', *Insider* (14 August 2018).

[133] Stepan Kravchenko and Ilya Arkhipov, 'Turkey crisis tests Putin's powers in global game with U.S.', *Bloomberg* (14 August 2018).

[134] 'Andrew Brunson: Turkey releases US pastor after two years', *BBC News* (12 October 2018).

[135] Quint Forgey, 'Don't be a fool!: Trump threatened Turkish president in letter', *Politico* (16 October 2019).

[136] The White House, 'Letter to His Excellency Recep Tayyip Erdogan, President of the Republic of Turkey', Washington, DC, 9 October 2019.

[137] Jim Zanotti and Clayton Thomas, 'Turkey: Background and U.S. relations in brief', Congressional Research Service, 9 November 2020.

[138] Galip Dalay, *Turkish–Russian Relations in Light of Recent Conflicts*, SWP Research Paper, German Institute for International and Security Affairs, August 2021.

whether these factors all underpin the resort to blackmail. This raises the critical question of the necessary and sufficient conditions for populist blackmail to occur. Evidently, populism is a necessary condition, but what about the other contributing factors? The perceived lack of security guarantees, for instance, was not unique to these blackmailers, as several non-populist US allies have experienced it over the years.[139] It is imperative that future research explores whether political grievances and populism, when combined, are sufficient for the emergence of this type of blackmail.

The article also shows that alternative arguments fail to account for the phenomenon under investigation, although bandwagoning for profit and hard hedging do shed light on the broader security context in the case of Turkey. The article also shows that blackmail was successful in the case of the Philippines, but only partially so in the case of Turkey. It seems that Duterte's threat was so sudden and vehement that Washington had a tough time reading his real intentions, which potentially explains why the United States was prompt to offer additional support to the Philippines to prevent a relative loss to China. In the case of Turkey, however, Washington sensed a bluff and was not as open to making concessions.

Moreover, evidence suggests that Duterte did not pay a price for blackmailing Washington. The fact that Duterte's defiance ended up being mainly rhetorical explains why it did not carry serious security implications for the United States. In the case of Turkey, however, hard hedging with Russia had real security implications for Washington (i.e. the purchase of the S-400 and a flexible alliance with Russia and Iran in Syria). Hence, the degree of President Duterte's defiance towards Washington differed from that of President Erdogan.

The analysis also demonstrates that the Duterte and the Erdogan regimes were both criticised by the White House for their human rights record and obstruction of democracy. As a result, they both suffered from economic and military sanctions by the United States. This clearly fuelled resentment and blackmail. This finding potentially raises a dilemma for the United States, as great power rivalry is likely to intensify in the coming years: should Washington continue to hold its allies accountable for their violations of human rights and democracy at the cost of bolstering tension and blackmail, or should it turn a blind eye on their wrongdoings to maintain more stable alliance relations in turbulent times? So far, Washington has managed to have it all by criticising allies while keeping them within its alliance network. But as we are witnessing the return of great power competition, it is likely that blackmail and threat of realignment will increasingly be used by some allies to gain greater influence and control over their environment. The question will then be whether the United States can manage alliance partners without alienating them to the point of pushing them into the arms of rival great powers.

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[139] Jonathan Paquin and Pierre Colautti-Féré, 'From attractiveness to hard hedging: US allies' response to Washington's lack of security assurance under the Obama and Trump presidencies', *Contemporary Politics*, Online First, 11 October 2023.

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