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Can Türkiye Be an Actor in the European Rearmament: Türkiye-Germany Case Study

by Emin Ege Ünver

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EXECUTIVE SUMMARY

The Russian all-out invasion of Ukraine on February 24, 2022, has awakened Europe to the realisation that it cannot take peace for granted any longer, exposing critical deficiencies in European military capabilities. Economic sanctions and military aid to Ukraine revealed the inadequacies in Europe's defense infrastructure, particularly the insufficient production capacity and lack of personnel. Concurrently, the U.S., Europe's traditional security guarantor, has shifted its focus to the Pacific, urging Europe to take greater responsibility for its territorial defense. This shift has been particularly challenging for Germany, which, after the Cold War, prioritized economic growth and disarmament, leading to over-reliance on the U.S. for defense. The urgent need to support Ukraine has highlighted the gaps in German military readiness, prompting a reevaluation of defense strategies. In contrast, Türkiye has emerged as a significant defense player, with substantial investments since 2002 leading to advanced, domestically designed military technologies. Despite political tensions, Germany and Türkiye have a history of defense cooperation, such as the use of German-made Leopards by the Turkish Armed Forces. This paper explores the potential for a German-Turkish partnership in joint defense production, examining key Turkish defense products and their applicability to the German Armed Forces. It also discusses the strategic benefits of such cooperation, including rapid rearmament and enhanced security collaboration, particularly in the context of the Ukraine conflict.



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Can Türkiye Be an Actor in the European Rearmament: Türkiye-Germany Case Study

INTRODUCTION

With the Russian invasion of Ukraine on 24th February 2022, Europe has awakened from its long sleep of peace on the continent. Despite economic sanctions and military aid to Ukraine, changing security environment is now putting pressure on Europe to consider its long-abandoned military focus. Sending aid to Ukraine made apparent the bad condition of European militaries. Equipment deficiencies and lack of personnel rendered sustainable aid impossible, as there is not enough production to meet the requirements. Another blow came from the defence guarantor of Europe, the USA. Starting with the Trump administration, the security situation evolved in the Pacific, as China rapidly raised its military capabilities and increased its dominance, pressuring key allies of the US such as Taiwan and Japan. Trump made clear that the US is no longer able to single-handedly provide total security by itself, and that Europe should step up. NATO's new framework also supported this idea that it is time for Europe to consider its territorial defence to share the burden with the US. Amidst the changing environment, European perspective started to shift from stable military spending to an increase, yet the big powers of Europe have crucial hinderances to overcome. The most apparent one among these countries is Germany. German mindset, especially after the Cold War with the "peace dividend" perspective, focused on economic growth and rapid disarmament. However, the army was neglected over a long period which led to the total dependence on the US for territorial defence and equipment supply. The necessity to aid Ukraine laid bare the insufficient levels of equipment and military personnel and triggered the initiative for European rearmament. Although public and political opinion are supportive of increased defence budget and limited rearmament, the rapid environment of insecurity required fast solutions to cover up the holes in German Armed Forces. While Europe's defence industry stagnated, a new power has risen on the continent as Türkiye's cumulative defence investments starting from 2002 have resulted in new technologies that are indigenously designed by Turkish Defence Companies, making Türkiye one of the biggest emerging arms exporters in the world. Despite the political tensions between Türkiye and Germany, they have important defence agreements on a number

of points such as the use of Leopards as the main battle tanks of the Turkish Armed Forces. This paper discusses the possibility of a German-Turkish agreement on joint defence production in various domains from land to air through the procurement of Turkish defence products and joint development of the ones already being designed. The paper will first touch briefly upon German-Turkish diplomatic relations, then the history and evolution of Turkish Defence Industry. Currently prominent defence products will be examined, and their possible use by the German Armed Forces will be discussed. Lastly, the means of such cooperation will be laid down and common aims on different areas of security, such as cooperation on Ukraine, and benefits such as rapid rearmament will be mentioned.

GERMAN-TURKISH POLITICAL AND SECURITY RELATIONS

German-Turkish relations have their roots deep in history since the medieval times through Ottoman-Holy Roman Empire wars, yet these two states became unlikely allies during the First World War, which had represented a new chapter in the Turkish foreign policy. With rapid territory losses, the Ottoman Empire acquired the notorious name of the “sick man of Europe”. Army was in decline, years behind the great powers of the era such as Great Britain, France, or Germany. Years of unsuccessful rulers and their corrupt cabinets led to the loss of territory and population. The last blow came with the First Balkan War where the Empire lost 83% of its European territories such as Bulgaria with its declaration of independence, and Greece.¹ The major consequences of the war and as the general outlook for the empire worsened, elites from upper commands of the army and bureaucracy started a revolution called the Young Turk Revolution.² The new leaders, notably those like Enver Pasha, the then Commander-in-Chief of Ottoman Army, saw the rising power of the German Empire as the way to regain lost territories while avoiding a global war.³ As Germany got more isolated in the international arena, the alliance with the Ottoman Empire seemed logical, as despite the lack of modernisation, the Empire had the numbers and geostrategic importance. For Berlin, alliance with the Ottomans would help two things: the Ottomans would open a new front for Russia and block passage through the straits and could mobilize Muslims to challenge the Entente rule in Africa and the Middle East.⁴ The Ottomans of-

1 Mustafa Aksakal, 'The Limits of Diplomacy: The Ottoman Empire and the First World War' (April 2011) 7 (2) Foreign Policy Analysis 197–203 <<https://doi.org/10.1111/j.1743-8594.2011.00132.x>>.

2 Ibid 198.

3 Ibid 200.

4 Ibid 201.

officially entered the war after bombarding Russian ports with ships bought with large loans from the Germans.⁵ Subsequent defeat in the World War led to a series of dramatic changes in both states with the collapse of monarchies and the rise of republics. German Weimar Republic was short lived, yet the foundations of the current Turkish state were laid during the same period, with Mustafa Kemal Atatürk proclaiming the republic after the War of Independence. After the fall of the Weimar Republic and the rise of Adolf Hitler-led Nazis, Türkiye opted to maintain its neutrality towards both blocs, the Allies, and the Axis as – during that period – Türkiye was in a recovery phase from the dramatic fall of the Empire with huge debt to pay and a nation to rebuild.⁶ Despite the outbreak of the Second World War, Turkish neutrality remained with the state authorities trying to play both sides especially with heavy pressure from the Nazi Germany to enter the war.⁷ Türkiye and Germany signed a Treaty of Friendship, a logical move by İnönü to ease the German pressure. Under the provisions of the Treaty, Türkiye would get military and logistical assistance such as equipment and railway locomotives to reinforce the struggling army in exchange for chromite.⁸ As it became clear that the Nazis would lose, Türkiye officially declared war on the Axis powers in 1944 and joined the Allies.⁹

Contemporary German-Turkish relations started with Gastarbeiter, workers exchange, from Türkiye to Germany as the latter was in dire need of manpower to ramp up the industry. Although these workers were temporary at first, with the bilateral diplomatic exchange, the workers became migrants and settled down.¹⁰ First and second generations of these workers mostly kept their Turkish citizenship, yet this became a source of friction in Germany which wanted to push the migrants, 1.3 million of whom have Turkish citizenship, to choose between their Turkish and German citizenships.¹¹ Through this policy and seeing that there are more opportunities, new generations choose German citizenship over Turkish, as Türkiye also gives these people administrative ease; they can use public services without

5 Ozan Özavcı, 'War Finance of Ottoman Empire' New Articles RSS <https://encyclopedia.1914-1918-online.net/article/war_finance_ottoman_empire> accessed 3 February 2024.

6 Natalia Chernichenkina, 'Rus Ekonomi Tarihçilerinin Eserlerinde Osmanlı Dış Borçları' (1 January 1970) Atatürk Araştırma Merkezi Dergisi <<https://atamdergi.gov.tr/tam-metin/224/eng>>.

7 U.S. Department of State, 'Allied relations and negotiations with Turkey' <https://1997-2001.state.gov/regions/eur/rpt_9806_ng_turkey.pdf> accessed 3 February 2024.

8 Foreign Relations of the United States, 'The Chargé in the United Kingdom (Matthews) to the Secretary of State' (1943) The Near East and Africa volume 4 <<https://history.state.gov/historicaldocuments/frus1943v04/d1183>> accessed February 4, 2024.

9 Ibid.

10 Jülide Danisman, 'How Germany Became a Country of Immigrants' *Deutsche Welle* (30 October 2011) <<https://www.dw.com/en/how-germany-became-a-country-of-immigrants/a-15495161>>.

11 Anna Fleck and Felix Richter, 'Infographic: Europe's Turkish Communities' (11 May 2023) Statista Daily Data <<https://www.statista.com/chart/29975/number-of-turkish-people-in-european-countries/>>.

citizenship through various mechanisms such as Blue Card.¹² With migrant workers, Türkiye and Germany sought closer diplomatic relations and this led to the German support for Turkish accession into the European Union, yet this support was not continuous. Germany's long-term leader Angela Merkel had been staunchly stating that seeking closer relations with Türkiye is a must, yet Turkish accession into the Union is unlikely.¹³ During the Merkel-Erdoğan period, Turkish-German relations continuously deteriorated with various landmark events. First of these events was the Turkish non-implementation of the Ankara Protocol as it included Cyprus.¹⁴ Second big event was the 2013 Gezi protests where initially peaceful protests opposing governments' actions led to frictions with the government as terrorist groups got involved to undermine the state authority. Germany criticised the harsh treatment of the protestors by the government, which in turn led Erdoğan to criticise Germany for not resolving racism in their own lands.¹⁵ Increasing bilateral tensions eased with the 2016 Refugee Deal, yet the relations shifted from Turkish accession into the European Union to a strategic partnership. Despite the period of ease, the recognition of so-called Armenian genocide by the German Parliament sparked negative opinions among Turkish citizens and elites which led to a series of events such as open criticising remarks by Erdoğan and other high-profile statesmen, preventing German MPs from meeting with German soldiers under NATO Mission deployed to İncirlik Base which provoked Germany to re-deploy these soldiers to another base and to impose sanctions on defence industry agreements.¹⁶ Despite challenges throughout the years, Germany is one of the biggest economic partners of Türkiye with bilateral trade of more than \$45 billion in 2022 which continues to grow.¹⁷ Türkiye's imports consist mainly of vehicle parts and machinery, while exports are textile, components for land vehicles such as engines.¹⁸ In addition to this, there is also a strong investment bond between the two countries with \$11 billion investment by Germany in Türkiye where approximately 8 thousand German enterprises operate. In exchange, Turkish Foreign Direct Investment in Germany amounts to nearly \$4 billion where 80 thousand Turkish companies employ almost 500

12 Susanne Schührer, 'Türkeistämmige Personen in Deutschland' (29 January 2020) Bundesamt für Migration und Flüchtlinge <<https://www.bamf.de/SharedDocs/Anlagen/DE/Forschung/WorkingPapers/wp81-tuerkeistaemmige-in-deutschland.html>>.

13 'Alman Başbakan Merkel: Türkiye'nin Ab'ye Üye Olmasını Beklemiyorum' *Euronews* <<https://tr.euronews.com/2021/07/22/alman-basbakan-merkel-turkiye-nin-ab-ye-uye-olmas-n-beklemiyorum>> accessed 4 February 2024.

14 'Angela Merkel 16 Yılda Türkiye'nin Ab'yle İlişkilerinin Seyrinde Nasıl Kritik Rol Oynadı?' *BBC News Türkçe* <<https://www.bbc.com/turkce/haberler-dunya-58675387>> accessed 4 February 2024.

15 Ibid.

16 Ibid.

17 Ministry of Foreign Affairs of the Republic of Türkiye, 'Commercial and Economic Relations between Türkiye and the Federal Republic of Germany' <<https://www.mfa.gov.tr/commercial-and-economic-relations-between-turkiye-and-the-federal-republic-of-germany.en.mfa>> accessed 4 February 2024.

18 Ibid.

thousand people.¹⁹ Through these links, Türkiye sees Germany as an ally, not only militarily through NATO, but also diplomatically in the international arena.²⁰ With the new government coming into power, Türkiye is optimistic that the long outdated customs union would be updated and during the negotiations, Germany would be an important ally as the mutual economic relations are important for both sides.²¹

EVOLUTION OF TURKISH DEFENCE INDUSTRY

The historical progress of the Turkish Defence Industry can be divided into five periods. The foundations of the contemporary Turkish Defence Industry were laid in the Ottoman Empire era which constitutes the first period, with institutions such as “Tophane-i Amire, Cebahane-i Amire, Tersane-i Amire” responsible for artillery production, ammunition production and naval vessel production respectively. However, with the arrival of 17th century, the Ottomans became increasingly dependent on foreign technology, especially British, as can be seen from the inventory check at that time which shows that most of the artillery was indeed of British origin.²² The second period of progress was between 1834 and 1923 and saw an attempt to revitalize outdated defence industry. During this period, the Ottomans acquired technology for their naval facilities which lacked most modern capabilities, and for armament facilities while increasingly purchasing guns, equipment, and ships, especially German by Krupp and Mauser as a result of diplomatic rapprochement between to states.²³ Although the primary source of military capabilities came from foreign purchases, some nationalisation attempts were also seen such as the first national and domestically-produced submarines at Taşkızak navy yard, and establishment of production facilities through public and private funding, which were later on, transferred to the newly founded Republic in 1923.²⁴

19 Ibid.

20 Ministry of Foreign Affairs of the Republic of Türkiye, ‘Relations between Türkiye and the Federal Republic of Germany’ <<https://www.mfa.gov.tr/relations-between-turkiye-and-the-federal-republic-of-germany.en.mfa>> accessed 4 February 2024.

21 Hacı Mehmet Boyraz, ‘Merkel Döneminde Türk-Alman İlişkileri’ (21 November 2023) SETA <<https://www.setav.org/merkel-doneminde-turk-alman-iliskileri/>>.

22 Enes Kurt, ‘Türk Savunma Sanayi Tarihi: Dönemler ve Aktörler (1834 – 2020)’ (Ötüken Neşriyat 2021).

23 Ibid.

24 Ibid.

The period of the newly founded Republic of Türkiye marks the third period between 1923 and 1950 which saw rapid nationalisation attempts after the collapse of the Empire and the post-war period of both the First World War and the War of Turkish Independence. Arms importation was mostly abandoned, and national production was given priority in the wake of the hardships encountered during the war.²⁵ With the War of Turkish Independence, there was a great demand for ammunition and for this reason many new armament production facilities were founded and in 1921, all were gathered under one institution named “General Directorate of Military Factories”.²⁶ Despite the promising progress of national production, the post-war economic hardship and the rise of tensions in Europe rendered the new institutions powerless and the production was not sufficient enough to resupply the needs of the army and, in turn, became a burden on the state’s capabilities.²⁷ To meet the growing gap, another institution was founded named the “Mechanical and Chemical Industry Corporation” designated to produce defence products and to resupply the requirements of the army, which still operates today.²⁸ In addition to public investment, private initiatives were also appreciated such as Nuri Killigil’s, an Ottoman Era General, and industrialist Şakir Zümre’s military factories which laid the foundations for the contemporary Turkish Defence Industry.²⁹ With the start of the Second World War, however, national industry once again faced hardship and after the death of Atatürk, the army requirements were met through offshore purchases.³⁰

Starting with 1950s, through the introduction of the Marshall Plan, Turkish defence perspective maintained its foreign purchases for military supply and the defence industry was neglected. Despite this, new and then-modern military equipment such as B-26 Marauder, F-47 planes and M-24 tanks were added to the inventory and a comprehensive education plan was introduced to better equip Turkish Armed Forces.³¹ The aid received by Türkiye was indeed much smaller in amount compared to other beneficiary states despite her proximity to Soviet Union’s border and post-war situation, yet it enabled Turkish Armed Forces to gain some technology and quality education.³² With Türkiye’s accession into NATO, military spend-

25 Ibid.

26 Nadir Yurtoğlu, ‘Türk Savunma Sanayiinde Girişimci Bir Kuruluş: Makine ve Kimya Endüstrisi Kurumu (MKEK) 1950-1960’ (2017) 31 *Yakın Dönem Türkiye Araştırmaları* 84.

27 Ibid.

28 Hüsnü Özlü, ‘II. Dünya Savaşından Günümüze Türkiye’de Savunma Sanayi’ni Gelişimi (1939-1990)’ (Dokuz Eylül Üniversitesi 2006) 82-83.

29 Kurt (n22).

30 Ibid.

31 Özlü (n28) 154-155.

32 Ibid 158.

ing increased as neighbouring states had at that period increased their own spending which threatened Turkish sovereignty. Until 1974, which marked the fourth period, this agenda of offshore purchase was pursued.

The 1970s, the fifth period, constitute a turning point for the Turkish Defence Industry, which is the de facto starting era of the current industry. The rising tensions in Cyprus between Greek and Turkish Cypriots reached their boiling point and led to a series of conflicts between the two communities. Despite attempts of the Turkish delegation and the then Prime Minister Bülent Ecevit's visits to London and Geneva to discuss peaceful terms, British reluctance and national pressure pushed Turkish authorities to act to protect Turkish Cypriots. Turkish Armed Forces deployed on the island which met little resistance from disorganized militias and the island was divided into two, Turks in the North and Greek Cypriots in the South. The outcome of the Cyprus Peace Operations was the subsequent arms embargo by the US and the European states, which was vehemently disputed by the Turkish society.³³ With the imposed embargo, it was seen that despite the earlier positive approach towards the Marshall Plan whose aid was needed, it indeed caused a setback to the Turkish Armed Forces which failed to establish its own, independent defence industry.³⁴ Turkish authorities, after the declaration of the implementation of the sanctions, decided to improve its national defence industry and to benefit from the European market.³⁵ Main aim of the Turkish Defence Industry at that time was to cover the lacking segments of the Army, and to resupply these areas with national devices. For instance, Turkish army was not given communication devices after the embargo, which led to the foundation of ASELSAN which obtained a production license from the Netherlands and covered the Army's needs to that end. Later on, ASELSAN would develop its own national designs, and other companies such as HAVELSAN and ASPILSAN were founded. During this period, the Mechanical and Chemical Industry Corporation (MKEK) was integrated into public institutions and more public investment was made with new facilities, new factories which increased the efficiency of the corporation and the production line.³⁶

33 Ali Rıza İzgi, 'Kıbrıs Barış Harekâtı Sonrasında Türkiye'ye Uygulanan Silah Ambargosu ve Sonuçları' (Pamukkale University Institute of Social Sciences 2007).

34 Feyyaz Berker, 'Kıbrıs Barış Harekâtı'ndan sonra Türk basınında milli savunma sanayii' *Savunma Sanayii Dergilik* (20 July 2020).

35 Cem Gürdeniz, 'Kıbrıs Barış Harekâtı ve Savunma Sanayii' *Aydınlık Gazetesi* (19 July 2015).

36 Yurtoğlu (n26) 104.

CONTEMPORARY TURKISH DEFENCE INDUSTRY

After approximately 20 years of development between roughly 1970s and 1990s, Turkish Defence Industry is able to design, build and produce its own line of arms which is actively used in its own army. Starting with AKP's victory in 2002 elections, sentiments towards "National Turkish Defence Industry" grew stronger. Looking at the annual reports of the Turkish Defence and Aerospace Industry Manufacturers Association (SASAD), the industry's revenue and exports nearly doubled between 2012 and 2019.³⁷ of the domestically designed main battle tank "Altay" and Otokar's "Tulpar" Infantry Fighting Vehicle are among national designs that are being developed and exported to third countries.

Figure 1: Turkish Arms Import

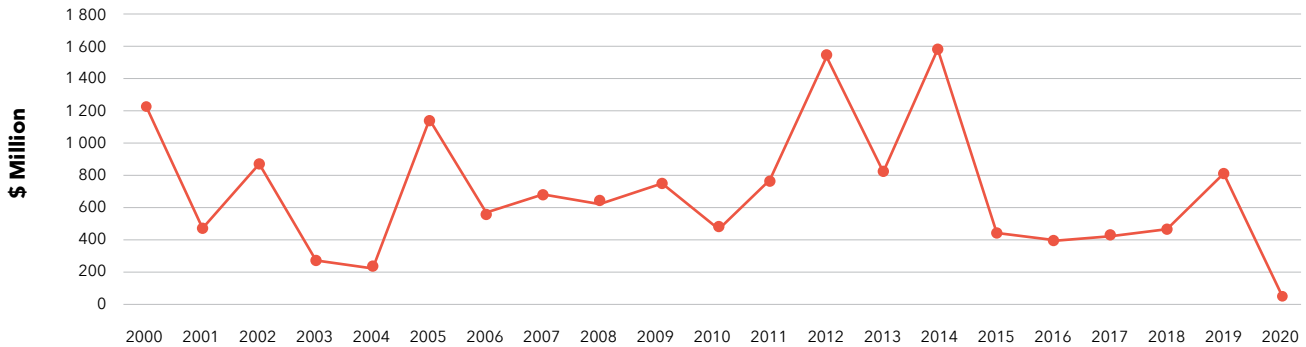
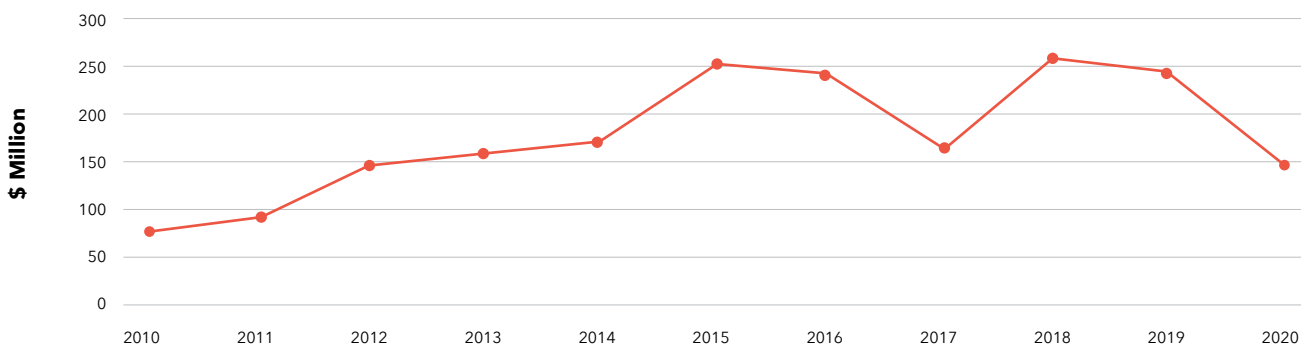


Figure 2: Turkish Arms Export



Source: Figure 1&2: 'Türkiye'nin silah ithalatı son beş yılda "yüzde 59 düştü"' BBC News Türkçe after: Stockholm International Peace Research Institute "SIPRI" <<https://www.bbc.com/turkce/haberler-dunya-56400050>> accessed 9 February 2024.

37 'Savunma ve Havacılık Sanayi Performans Raporu' SASAD <<https://www.sasad.org.tr/sasad-savunma-ve-havacilik-sanayii-performans-raporu/>> accessed 2 November 2020.

As can be seen from the graphs above, Turkish arms import is decreasing and in contrast, the export is on the rise. This is due to the rising tensions between Türkiye and its main allies – the European Union and the US, the former imposing sanctions over Turkish counter-terrorism operations against Kurdish rebel groups present in Northern Syria posing threat to national security through their link with the PKK terrorist groups, and the latter on Turkish acquisition of S-400 surface-to-air missiles (SAM) which resulted in the removal of Türkiye from the F-35 programme.³⁸ Especially the last four years, the main income from exports are arms deals, therefore Türkiye is able to keep public investment alive and encourage private initiatives to focalise on defence industry companies and unique designs. Through these designs, Türkiye achieved a substantial growth and significantly decreased its foreign dependence from approximately 80% in 2004 to 20% 2022, making her the 12th largest arms exporter and 2nd largest among developing arms exporters while breaking \$4.4 billion worth of arms contracts.³⁹

Figure 3: Share of Global Imports (%)

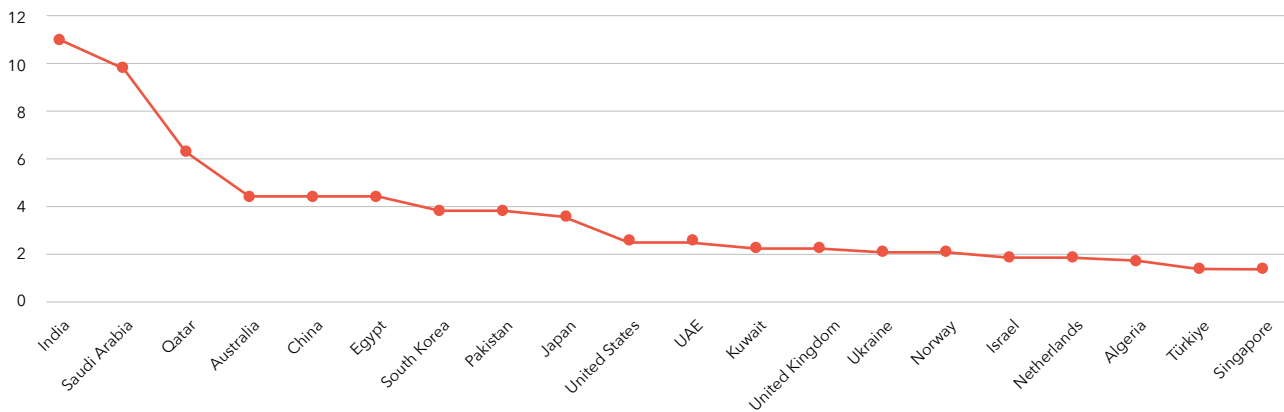
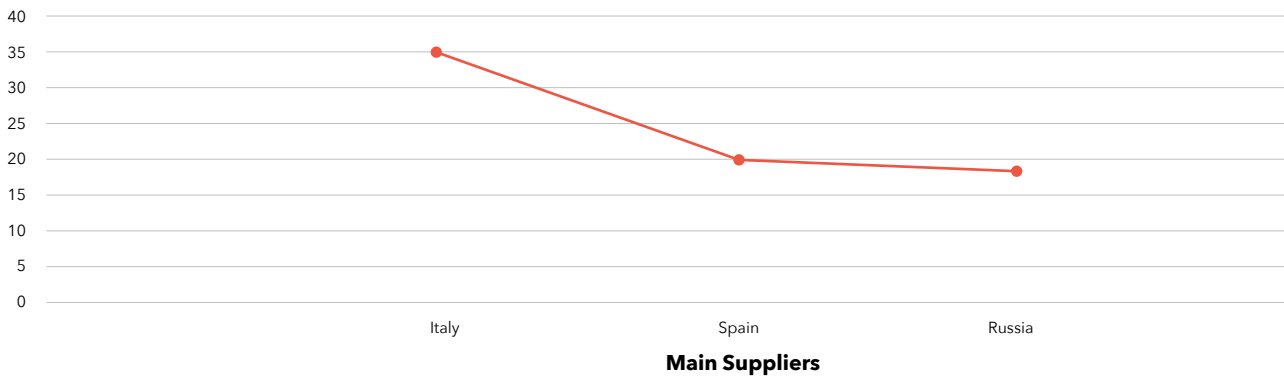


Figure 4: Total Turkish Imports (%)



Source: Figure 3&4: Haber Merkezi, 'Türkiye'nin Silah İhraç ve İthal Ettiği Ülkeler Açıklandı' *SavunmaSanayiST* (13 March 2023) <<https://www.savunmasanayist.com/dunyada-bir-ilk-nazar-lets-envantere-girdi/>>.

38 Charles Schulz, 'Türkiye's Growing Arms Industry: Tensions Emerge with the West amid Domestic Ambitions and International Commitments' (4 December 2023) AOV <<https://aoav.org.uk/2023/turkiyes-arms-industry-and-the-arms-trade-treaty-growing-tensions-with-the-west-amid-domestic-ambitions-and-international-commitments/>>.

39 Ibid.

Figure 5: Share of Global Exports (%)

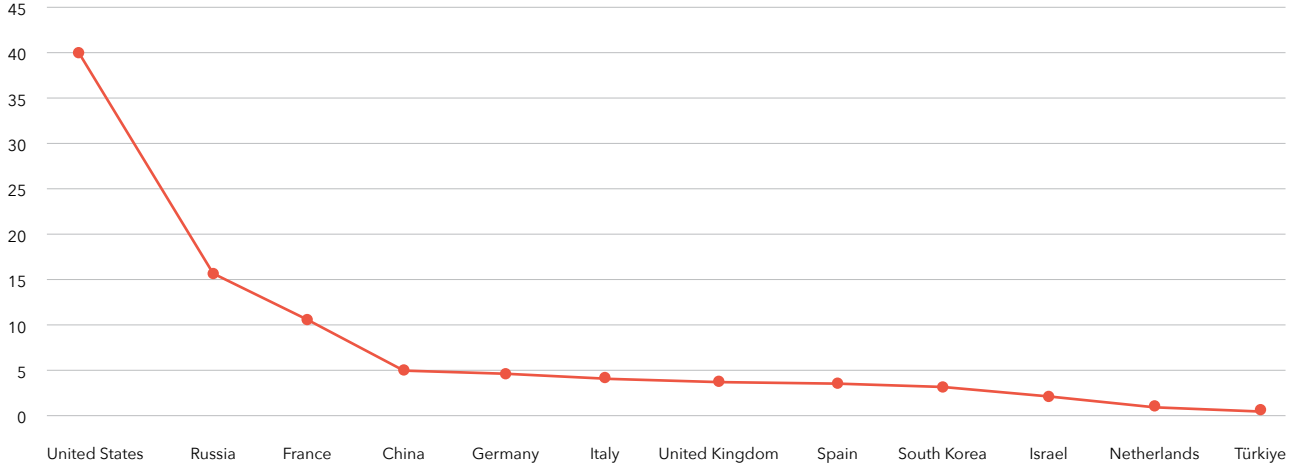
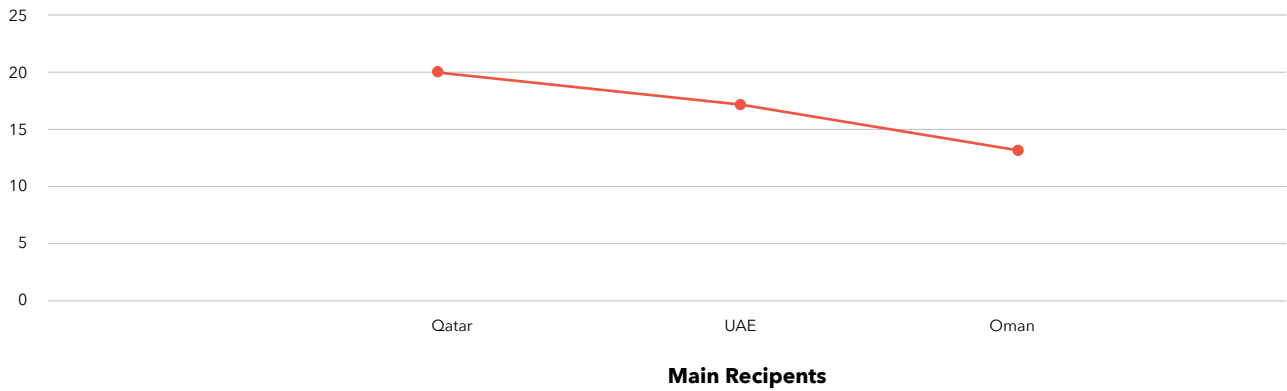


Figure 6: Total Turkish Exports (%)



Source: Figure 5&6: Haber Merkezi, 'Türkiye'nin Silah İhraç ve İthal Ettiği Ülkeler Açıklandı' *SavunmaSanayiST* (13 March 2023) <<https://www.savunmasanayist.com/dunyada-bir-ilk-nazar-lets-envantere-girdi/>>.

Turkish Defence Industry saw a significant rise in 2018-2022 period when the imports dropped from 2.4% to 1.3, and exports rose from 0.6% to 1.1%, passing the 1% barrier for the first time in her history, making Türkiye the most dynamically growing arms exporter among the first 25 exporters just behind Poland and Belgium.⁴⁰ While reducing the imports in general, Türkiye also reduced her military dependence on the US, dropping from the 7th to 27th position among states importing American-made arms.⁴¹ Turkish imports from Italy are mainly connected with the license for T129 ATAK twin-engine attack helicopter which is based on an Italian model of Agusta A129 Mangusta platform, produced under license.⁴² Türkiye's aims when

40 Haber Merkezi, 'Türkiye'nin Silah İhraç ve İthal Ettiği Ülkeler Açıklandı' *SavunmaSanayiST* (13 March 2023) <<https://www.savunmasanayist.com/dunyada-bir-ilk-nazar-lets-envantere-girdi/>>.

41 Ibid.

42 Tolga Ozbek, 'AgustaWestland 129 to Be Model for Turkish Atak' *Flight Global* (9 October 2019) <https://www.flightglobal.com/agustawestland-129-to-be-model-for-turkish-atak/76180.article>.

obtaining the license was to be able to sell the platform to third countries, as the avionics, radars, and rotor blades were upgraded and locally-produced to best suit Turkish Armed Forces. However, the licensed platform included LHTEC CTS800-4N engines, and despite Türkiye having the intellectual property rights, this would give the US a veto over the sale of any unit to any third country. This led to another design by the Turkish Defence Industry, namely Tusaş Engine Industries (TEI), that developed the “TS1400” engine for both ATAK and GÖKBAY, twin-engine light transport helicopter designed back in 2010 by Turkish Aerospace Industries (TUSAŞ).¹ Spanish imports include designs for TCG Anadolu, which was contracted for the Turkish Armed Forces via Spanish-Turkish consortium based on Spanish Juan Carlos class ships.² Türkiye is also a program partner for Spanish Airbus A400M military transport aircraft some of whose components are produced by Turkish arms manufacturer TUSAŞ, and as of now, Türkiye received 10 of these, last of which was delivered in 2022.³ The bulk of Russian imports is constituted by the purchase of S400 SAMs, which were delivered in 2019.⁴

Although Gulf States perceived as the main destination for Turkish arms exports, it can be seen from the 5th and 6th graphs that they are more multifaceted and driven by geopolitics. The most eye-catching Turkish technology is the Bayraktar-made TB2 UAVs which are produced indigenously and exported to Qatar, Ukraine and Azerbaijan, constituting the biggest portion of the exports.⁵ The most important advertisement for a military technology is to show its field performance, and Türkiye just did that through the Azerbaijan’s army. The Nagorno-Karabakh conflict between Armenia and Azerbaijan became the military showdown of Turkish TB2 drones, which was reiterated by President Aliyev throughout the war.⁶ During this period, both Azerbaijani mainstream media, and social media sites especially Twitter, were full of TB2 drones eliminating military convoys and military equipment, the hit news were, however, the drones operating among and above SAM sites such as Pantsir and S300.⁷

1 ‘Turkish Aerospace to Receive First ATAK GÖKBAY Helo Engine Prototype’ *Defense Mirror* (3 December 2022) <https://www.defensemirror.com/news/28460/Turkish_Aerospace_to_Receive_First_ATAK_GOKBAY_Helo_Engine_Prototype>.

2 Mustafa Emir Bilgen, ‘LHD Anadolu’dan Bir Adım öncesi LPD Levent ve LPD’ler’ *MaviVatan* (10 December 2022) <<https://mavivatan.net/lhd-anadoludan-bir-adim-oncesi-lpd-levent-ve-lpdler/>>.

3 Haber Merkezi, ‘İspanya A400M siparişlerini iptal etme yolunda’ *SavunmaSanayiST* (13 March 2023) <<https://www.SavunmaSanayiST.com/ispanya-a400m-siparislerini-iptal-etme-yolunda/>>.

4 Dmitri Chirciu, ‘S-400’ler Üç Parti Şeklinde Teslim Edilecek’ *Anadolu Ajansı* <<https://www.aa.com.tr/tr/dunya/s-400ler-uc-parti-seklinde-teslim-edilecek/1529884>> accessed 10 February 2024.

5 ‘Bayraktar TB2’ BAYKAR Technology <<https://baykartech.com/en/uav/bayraktar-tb2/>> accessed 10 February 2024.

6 Jack Detsch, ‘The U.S. Army Goes to School on Nagorno-Karabakh Conflict’ *Foreign Policy* (30 March 2021) <<https://foreignpolicy.com/2021/03/30/army-pentagon-nagorno-karabakh-drones/>>.

7 Ibid.

worth of equipment and finding strategic gaps to exploit and give ground for land forces to advance.⁵⁰ The field success brought more attention to the Turkish Aerospace sector, especially to Bayraktar and new orders were lined up. Ethiopian government signed a military agreement with Türkiye to acquire the Bayraktar TB2 UAVs to fight rebel groups in Tigray region.⁵¹ Saudi Arabia was interested in another model of the Bayraktar fleet, the AKINCI which is bigger than the TB2, has a higher flight altitude and can carry more complex technologies and armament with higher explosive power.⁵² Saudis' bid can amount up to \$3 billion, which is a billion short of 2022's sales record. The interest in Turkish defence technologies from the Gulf States is a means to diversify their own national security, which up to now, was dependent on Western powers.⁵³ To end this dependence, they also aspire to build their domestic industries, and for this reason, some of the bids include technology transfer. In 2022, the UAE was interested in TB2s and bid to acquire 120 UAVs including ammunition, command and control units and training.⁵⁴ One of Türkiye's allies in the region, Qatar acquired 6 TB2s with ground control station and simulator training while Kuwait signed a \$370 million agreement with Bayraktar for TB2s.⁵⁵ Turkish drones are also granted through defensive agreements, for instance to GNA in Libya, the UN-backed Tripoli government which was losing the initial phase of the war against Haftar's forces. Türkiye assisted GNA with TB2 drones, Hisar short-range SAMs and Korkut anti-aircraft guns that helped creating air defence bubbles for land forces to advance, which enabled GNA forces to rapidly advance and change the tide of the war.⁵⁶ Libya's geographical disposition with vast open areas necessitating air coverage increased TB2s efficiency, enabling GNA forces to defeat Haftar forces in many battles.⁵⁷ Bayraktar also granted Ukraine 3 TB2 UAVs through crowd-funding, the goal set

50 Eado Hecht, 'Drones in the Nagorno-Karabakh War: Analyzing the Data', *Military Strategy Magazine* (17 January 2022) <<https://www.militarystrategymagazine.com/article/drones-in-the-nagorno-karabakh-war-analyzing-the-data/>>.

51 Schulz (n 38)

52 Haber Merkezi, 'Suudi Arabistan'ın alacağı AKINCI TİHA sayısı açıklandı' *SavunmaSanayiST* (5 February 2024) <<https://www.SavunmaSanayiST.com/suudi-arabistanin-alacagi-akinci-tiha-sayisi-aciklandi/>>.

53 Holly Dages, 'Turkey's Defense Industry Is on the Rise. the GCC Is One of Its Top Buyers' *Atlantic Council* (4 August 2023) <<https://www.atlanticcouncil.org/blogs/menasource/turkey-defense-baykar-gcc-gulf/>>.

54 Ibid.

55 Ibid.

56 Ben Fishman and Conor Hiney, 'What Turned the Battle for Tripoli?' *The Washington Institute* <<https://www.washingtoninstitute.org/policy-analysis/what-turned-battle-tripoli>> accessed 12 February 2024.

57 Murat Sofuoglu, 'How Turkish Drones Are Changing the Course of the Libyan Civil War' *TRT World - Breaking News* (22 May 2020) <<https://www.trtworld.com/magazine/how-turkish-drones-are-changing-the-course-of-the-libyan-civil-war-36544>>.

for the amount which was \$15 million was reached in just three days with more contributions than expected.⁵⁸

Turkish defence exports are not only limited to Aerospace sector, but also land and sea products see an impressive demand. On land, the tactical wheeled armoured vehicle KİRPI, built in accordance with NATO standards, is one of the high sellers in the catalogue. As of now, UAE has added these vehicles with a suitable configuration for their own armed forces,⁵⁹ Tunisia added 41 more of KİRPIs with different configuration such as anti-landmine and ambulance, totalling 92 TWAV and expected to reach 233 with new contracts negotiated, making it the biggest fleet after Turkish Armed Forces.⁶⁰ Other important buyers of KİRPI are Somalia with 12 versions of the vehicle, and North Macedonia, which is the first NATO member state to add it to its inventory, Ukraine with 50 vehicles and 150 more to be sent⁶¹, and Qatar with 85 vehicles to be added to the inventory.⁶² The armoured combat vehicle PARS, produced by FNSS Defence Systems was acquired by Oman and 172 of these were added to the inventory with a depot-level maintenance support facility to be built.⁶³ Nurol Ejder – “Dragon” in Turkish- is another top exported land vehicle produced ingeniously by Nurol Makina, a Turkish Defence company, and has been delivered to Burkina Faso, Georgia with orders up to 220 units, Tunisia, Qatar with 342 vehicles negotiated on order, Morocco with 30 units and Hungary with 10 in service, and 350 to be produced under license, making it the first EU Member State to acquire this type of vehicle.⁶⁴ Otokar, automotive and defence industry company, produced armoured fighting vehicle ARMA exported to Bahrein with 73 units, Estonia with undisclosed amount in a 230-unit delivery.⁶⁵ In addition to unit exports, Otokar partnered with UAE-based Tawazun Holdings and founded “Al-Jasoor” defence company to produce “Rabdan” , a wheeled armoured vehicle. This

58 ‘Baykar, 3 Adet Bayraktar TB2 Sıha’yı Ukrayna’ya Hibe Ettiğini Açıkladı’ BAYKAR Teknoloji <<https://baykartech.com/tr/press/baykar-3-adet-bayraktar-tb2-sihay-ukraynaya-hibe-ettigini-acklad/>> accessed 12 February 2024).

59 Mehmet Ali Kula, ‘Bae’ye Vuran TTZA İhracatı’ *DefenceTurk* (13 October 2023) <<https://www.defenceturk.net/baeye-vuran-ttza-ihracati>>.

60 Göksel Yıldırım, ‘BMC’Den Tunus’a Yeni Kirpi İhracatı’ *Anadolu Ajansı* <<https://aa.com.tr/tr/ekonomi/bmcden-tunusa-yeni-kirpi-ihracati/2284943>> accessed 13 February 2024.

61 ‘Türkiye’den Ukrayna’ya 50 Kirpi’ *Deutsche Welle* (9 August 2022) <<https://www.dw.com/tr/t%C3%BCrkiyeden-ukraynaya-50-kirpi/a-62757127>>.

62 Göksel Yıldırım, ‘Kirpi II ve Amazon İhracat Yolculuğuna Başladı’ *Anadolu Ajansı* <<https://www.aa.com.tr/tr/ekonomi/kirpi-ii-ve-amazon-ihracat-yolculuguna-basladi/1089505>> accessed 13 February 2024.

63 ‘FNSS’nin Umman’da Hayata Geçireceği “Fabrika Seviyesi Bakım Onarım Merkezi” projesi için imzalar atıldı’ (7 July 2022) FNSS <<https://www.fnss.com.tr/tr/medya/haberler/fnssnin-ummanda-hayata-gecirecegi-fabrika-seviyesi-bakim-onarim-merkezi-projesi-icin-imzalar-atildi-1445>>.

64 Mehmet Yılmaz, ‘Macaristan’a Türk Zırhlısı Ejder Yalçın’ın İlk Teslimatı Yapıldı’ *Anadolu Ajansı* (11 February 2021) <<https://www.aa.com.tr/tr/dunya/macaristana-turk-zirhlisi-ejder-yalcinin-ilk-teslimati-yapildi/2141623>>.

65 ‘Estonya’dan 230 Adet Otokar Arma ve Nurol NMS siparişi’ *SavunmaSanayiST* (18 October 2023) <<https://www.SavunmaSanayiST.com/estonyadan-230-adet-otokar-arma-ve-nurol-nms-siparisi/>>.

vehicle is manufactured based on Arma 8x8 license and will be supplied the Emirati land army to replace the outdated BMP-3 IFVs.⁶⁶ Upcoming Turkish land warfare vehicle projects include TULPAR light tanks and ALTAY main battle tanks (MBT). TULPAR light tank was produced with the know-how acquired from the development progress of ALTAY, and recently successfully passed its firing tests.⁶⁷ However, the main focus of the defence industry is on ALTAY MBTs, which is projected to be the main tank line of the Turkish Armed Forces. ALTAY has been a matter of debate since 2010 when the first images of the tank was shown, and after a long development process, it became the new apple in Turkish public's eye. More than 200 hundred sub-contractor companies are working for the ALTAY project led by BMC Automotive, an automotive manufacturer with a military side production of transportation and armoured vehicles designed by Otokar. The tank's main armament, main armour, reactive armour and electronics are made by Turkish companies such as MKE, Roketsan and Aselsan. The engine is licensed under Hyundai Infracore, and the transmission is licensed under SNT Dynamics. The production was delayed for a brief period, as it was projected to be built with German engines and RENK transmissions,⁶⁸ but the German sanctions imposed due to Turkish counter-terrorism operations in Syria led to the choice of the South Korean engines and transmissions. So far, 2 prototypes have been delivered to the Turkish Armed Forces, and a total of 100 units is to be produced and delivered by 2025, with an approximate 1.5 years of field testing. ALTAY or "New Altay" is expected to have 3 versions like the American Abrams MBT, T1, T2 and T3. The most advanced one will have an autoloader, unmanned tower, bigger main gun, command centre for use of external drones and VR command systems.⁶⁹

The security of the seas constitutes an important part of the Turkish Defence Doctrine, with an increased emphasis on it due to the rising tensions between Greece and France in the Mediterranean. Historically, the naval branch of the army had always been neglected, despite its apparent importance, and with this mindset, naval platforms were given adequate importance during the rapid growth of the national defence industry. Notable projects are MİLGEMs (abbreviation for "National Ships") which at first was launched to meet the Turkish Navy's needs and to modernize the outdated ships

66 'Rabdan 8x8 Infantry Fighting Vehicle' *Army Technology* (12 April 2021) <<https://www.army-technology.com/projects/rabdan-8x8-infantry-fighting-vehicle>>.

67 Göksel Yıldırım, 'Tulpar Tankı İHRACAT Sınavında' *Anadolu Ajansı* <<https://www.aa.com.tr/tr/turkiye/tulpar-tanki-ihracat-sinavinda/1410376>> accessed 13 February 2024.

68 'Altay Main Battle Tank' *MilitaryToday Arg* <<https://www.militarytoday.com/tanks/altay.htm>> accessed 13 February 2024.

69 Kaan Azman, 'Altay T3 AMT İçin Planlanan Özellikler Açıklandı!' *DefenceTurk* (25 November 2022) <<https://www.defenceturk.net/altay-t3-amt-icin-planlanan-ozellikler-aciklandi>>.

and submarines. Nowadays, Türkiye exports ships through the same project. Pakistan is one of the biggest beneficiaries as through the MİLGEM project, it modernizes the outdated AGOSTA 90B submarines⁷⁰, and will receive 2 ships based on MİLGEM platforms tailored to Pakistani Navy, which is the biggest chunk of Turkish navy exports.⁷¹ Malesia has negotiated a purchase for a total of 8 corvettes based on the MİLGEM platform.⁷² Another point of interest is the Turkish LHD, TCG Anadolu L-400 which is the largest warship in the Turkish inventory. Türkiye's original plan was to obtain F-35Bs which could land and lift vertically unlike its A and C counterparts, as the LHD is much smaller than a regular aircraft carrier and has not got a long take off ramp to accommodate F-16s. After falling out of the F-35 project and with the rise of UAVs, Türkiye changed the project to make the LHD the first drone carrier in the world.⁷³ The Gulf States are also interested in the LHD, as an undisclosed Gulf country, probably UAE or Saudi Arabia, is in talks for a possible acquisition of a similar platform, whose building cost is estimated to be \$1 billion.⁷⁴

POSSIBLE TURKISH PARTICIPATION IN EUROPEAN REARMAMENT - GERMAN CASE STUDY

With war returning to the European soil, the question of rearmament of Europe echoes through the Member States of the Union. While the Union is quick to think out solutions for other forms of insecurity such as energy dependence on Russia and food crisis due to war, there was a lack of first response to defence dependence. Especially since the end of the Second World War, the European focus was on reconstruction and then further progress in terms of trade and soft diplomacy. Arguably apart from France, other founders of the Union, especially Germany, neglected armed forces on many occasions in favour of other areas. The UK's deteriorating economic situation,

70 'Türkiye'nin İlk Denizaltı Modernizasyon İhracatında Önemli Aşama' STMDefence <<https://www.stm.com.tr/tr/medya/basin-bultenleri/stm-pakistan-agosta90b-projesinde-ikinci-denizaltiyi-teslim-etti-basin-bulteni>> accessed 14 February 2024.

71 Göksel Yıldırım, 'Milli Gemilerin İhracat Yolu Açık' *Anadolu Ajansı* <<https://www.aa.com.tr/tr/ekonomi/milli-gemilerin-ihracat-yolu-acik/3000210>> accessed 14 February 2024.

72 Malezya'ya MİLGEM Savaş Gemisi İhracatında Yeni Detaylar' *SavunmaSanayiST* (14 February 2024) <<https://www.SavunmaSanayiST.com/malezaya-milgem-savas-gemisi-ihracatinda-yeni-detaylar/>>.

73 Holly Dagnes, 'Turkey's Defense Industry Is on the Rise. the GCC Is One of Its Top Buyers.' *Atlantic Council* (4 August 2023)

74 Ibid.

which recently declared to have entered recession, saw lower defence budgets and lack of focus, and its exit from the Union damaged even further the idea of a common armed response. According to Global Firepower Index, France is no longer in the top 10 armies in the world, Germany ranks 19th, behind countries such as Iran and Indonesia which are economically much less powerful, and only Italy seems to be a formidable force in the Union with a sizeable navy, ranking 10th. Although this seems like the Union had not sufficient time to respond to evolving security issues, yet this is not the case. Starting with the Trump administration, the US showed signals to a possible and gradual retreat from European soil to focus on another growing threat in the East: China. Trump first reduced the number of the troops stationed in Germany, and retreated from the Middle East, greatly reducing the influence of the US.⁷⁵ The lack of response to this growing American sentiment that Europe should step up its capability to defend itself brought the harsh reality to surface with the war in Ukraine, where now artillery shell supplies are running low due to low stocks and low production. A possible defeat or reconciliation in Ukraine may open up new fronts in Europe amidst growing tensions with Belarus, Russian interest in the Baltics and Finland, and in other regions such as the Middle East, the Sahel and the Far East. With reference to such background, it is an obvious fact that Europe should start building up its military capabilities not only to defend itself but to support its allies. The torch should be carried, in this regard, by one of the founders of the Union and the European perspective, the most advanced economy of the continent: Germany.

Germany already has a strong foundation for a prosperous defence industry and very successful companies such as Rheinmetall which is the leading armoured vehicle producer in Europe, Hensoldt, a prominent aerospace company, and Diehl Defence, an air defence and missile producer. However, despite this strong foundation, Germany faces various challenges to be met. Nowadays, German National Armed Forces “Bundeswehr” lack personnel, quantity in advanced technological units, combat-ready navy units, and budget to fix all of them. The current situation has a historic explanation to it, deriving from the end of Cold War with the hostilities between the US and Soviet Union coming to an end, military spending became irrelevant. One of the biggest hits to the armed forces was the 2011 Bundeswehr reform which introduced suspension of compulsory military service, reduction in personnel and adoption of a more “modernized” battle group which put professionalism over quantity. In 2017 after an accident in Norway, Germany had no functioning submarines for the

75 Ian Bond, “Trump Sounds the Retreat: Can European Defence Advance?” (26 June 2020) Centre for European Reform <<https://www.cer.eu/insights/trump-sounds-retreat-can-european-defence-advance>>.

rest of the year, which further showed the inadequacy in the armed forces.⁷⁶ The loopholes in the procurement system resulted in lack of equipment, and infrastructure deficiencies further exacerbating the problem. This bleak picture started to change after increased hostilities from Russia, and especially after the illegal annexation of Crimea, Germany adopted series of frameworks to rebuild the army. Despite the desperate need to increase the budget, German domestic policies are quite complex in this regard as more conservative members support the increase while social democrats argue that the increased spending would lead to a dilemma, stating that Trump's actions were pushing the German rearmament agenda.⁷⁷ This political division is also present among the public as seen in a 2017 poll where only 32% of the participants supported an increase in defence budget.⁷⁸ Based on this, Germany needs to fill the gaps in the armed forces in accordance with the fiscal prudence mindset through intense negotiations with the public and with the prominent political figures.

In this regard, emerging Turkish defence industry can be a viable lifeline for German rearmament. Turkish-German defence relations are multifaceted with bilateral and multilateral agreements through public and private institutions. Germany and Türkiye are allies in NATO, which is a positive aspect of a hypothetical defence procurement agreement as there will be no compatibility issues since all the Turkish arms are made in accordance with NATO requirements. While talking about possible use of Turkish-made or joint-made arms, Türkiye already uses German-made equipment. Most notable ones are Leopard 2 tanks constituting the main battle tank units for the armed forces, Type 214 submarines, Heckler & Koch G3 and MP5 firearms which are currently mostly replaced by domestically produced MPT-76s. Prominent private sector agreements are also present such as Rheinmetall-BMC for Leopard 2s, Siemens-Turkish Shipyards for electronics, and ThyssenKrupp for the Type 214s. Thus, there seems to be a strong basis for multilateral agreements, and this could be further used to revitalize the frozen defence relations as Türkiye can fill the gaps in the German army with ample and sustained investment. German navy can be assisted with the Turkish MİLGEM project, which is the main supply of navy units to the Turkish Navy with domestic production which also includes submarines, 5 of which will be delivered to the Turkish Armed Forces in 2027. An agreement between German TKMS and Turkish shipyards are present, and with further

76 David Charter, 'German Navy Left without Submarines after U-Boat Hits Rocks' *The Times* (24 October 2017) <<https://www.thetimes.co.uk/article/german-navy-left-without-submarines-after-u-boat-hits-rocks-vrv6khdqg>>.

77 Barbara Kunz, 'The Real Roots of Germany's Defense Spending Problem' (8 August 2018) War on the Rocks <<https://warontherocks.com/2018/07/the-real-roots-of-germanys-defense-spending-problem/>>.

78 'Results of a representative survey on German attitudes to foreign policy' *The Berlin Pulse* (2020 Körber-Stiftung <https://koerber-stiftung.de/site/assets/files/18573/koerber_theberlinpulse_web_20201118.pdf>.

investment, joint project can be made with the combination of both know-hows. Despite British-German cooperation on the Challenger 3 tank, Germany can also support Turkish Altay MBT for inventory diversification, as Altay was first intended to be made in collaboration with Rheinmetall. Altay will feature a domestically made main gun, with electronics, communication, and radar produced by Aselsan which would further lower the cost per unit. Rheinmetall's valuable background would be an indispensable addition to the project, which can foster European Collective Defence with sustained production, and can also lower the cost of production of other Leopard variables, as the ones in Turkish inventory are modernized by Aselsan with improved electronics which can also benefit German counterparts.

Another possible field of cooperation is in the production of air defence systems and missiles. Turkish sensitivity to air defence has been a source of international tensions, especially during the Turkish acquisition of Russian-made S400 surface-to-air missiles as a result of repetitive rejection by the USA to sell Patriots. This acquisition, however, did not stop innovation as prominent Turkish defence companies have developed their own projects and some of them have been in service for years. Notable ones are Roketsan's Hisar (Fortress) SAM systems with different configuration such as A, O, U based on the mission range, and Aselsan's Siper (Trench in Turkish), long-range SAM systems. Roketsan's tactical ballistic missile Bora (Khan) and Tayfun (Typhoon) have been actively used in Syrian operations. With the growing importance of air assets, air defence has also become a crucial aspect of contemporary warfare, as air dominance is a key factor in military victories, as seen in the Ukrainian war. As a means to achieve strategic autonomy, German-led "European Sky-Shield Initiative" (ESSI) is established to produce cost-efficient air defence capabilities for European states. Despite her appearance as distant to Europe, Türkiye has also formally joined the Initiative.⁷⁹ Türkiye plans to offer, undisclosed as yet, domestically produced air defence solutions, which would probably be the aforementioned systems. This joint programme may open up other collaborations in various missile and air defence systems, namely between German Diehl and Turkish Aselsan-Roketsan.

Continuing with the air domain, Türkiye has a selection of units to offer. Arguably, German air capabilities lack the most after the naval ones, with reports from previous years showing concerning low levels of combat-readiness, with one report from 2018 that only 10 of 128 German Eurofighters were combat-ready, others were out-of-mis-

⁷⁹ Defence Industry Europe, 'Greece and Turkey join European Sky Shield Initiative (ESSI)' (19 February 2024) <<https://defence-industry.eu/greece-and-turkey-join-european-sky-shield-initiative-essi/>>.

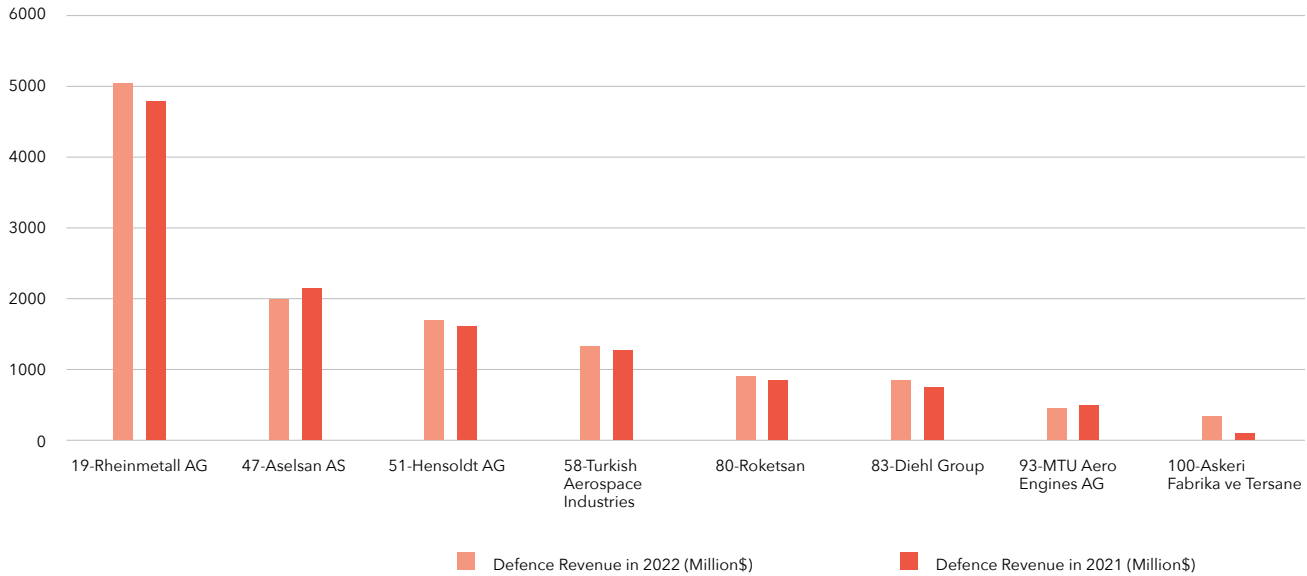
sion due to various technical problems.⁸⁰ Taking this number into account, Germany as of 2024 has 133 fighter aircraft, meaning that almost 80% of the total inventory is not active and combat-ready. It is true that with the growing tension in the continent and acquisition of F35 has improved the total power of German air force, still it needs substantial augmentation. Türkiye can step up and fill the gaps in the Airforce with its 5th generation fighter jet project, the TFX Kaan (Khan). Making its maiden flight days before, TFX Kaan bases its model on American F22 Raptor, with bigger wingspan and similar specs. Avionics, radar and sub-electronic systems are fully made by Aselsan, and the most crucial part of the jet, the engine, is currently the American General Electric F110 Turbofan, however this is seen as a fixed future plan. Turkish perspective on foreign engines has been quite negative following the sanctions, especially after the deal for Altay that was projected to use a German-made engine was never sealed. The main contractor of TFX Kaan, TUSAŞ Engine Industries have also been working on a domestic engine, TEI-TF6000, which is announced to be successfully implemented in various units. At least 14 units of TFX Kaan are estimated to be produced, some of which will include this engine. The project making Türkiye the third country to develop a successful 5th generation fighter jet after the USA and China, caught the attention of other powers, notably Russia proposing a partnership on the development project and joint production. The response of the Turkish government is a mystery, yet this proposes a chance for EU-Türkiye defence relations, and a great substitute for Germany to replenish its inventory and to collaborate on joint production which would further lower the cost per unit. With German initiative, the project could gain a collaborative aspect similar to the Eurofighter Typhoon one and would be a valuable substitute for the American F22 Raptor, which is out of reach for third countries. As a complimentary, Türkiye has its best aerial unit to offer: the drones. Currently, Turkish UAVs are being used both by European and NATO powers such as Poland, Romania and Ukraine, with interest from Egypt and Saudi Arabia. There are undoubtedly questions on whether drones are changing how the modern warfare is conducted, it is undeniable that Turkish drones when used through strategic coordination, changed the courses of some of modern wars mentioned before. German inventory would benefit from Turkish drones such as TB2s which are low cost per unit and highly effective, and Akıncı units which are high altitude and capable of carrying more destructive armament to carry out strategic bombing are great substitutes to be used for high-risk missions as they are easy to be replaced. Lastly, Turkish attack helicopters would

⁸⁰ Chase Winter, 'Handful of Germany's Eurofighter Jets Combat Ready' *Deutsche Welle* (2 May 2018) <<https://www.dw.com/en/only-4-of-germanys-128-eurofighter-jets-combat-ready-report/a-43611873>>.

also be a great addition to the Airforce. The Atak attack helicopters with aforementioned specs are used in Turkish Armed Forces in counter-terrorism operations with different configurations. Joint German-Turkish production agreement with the production capabilities of Türkiye and a sustained funding from Germany would fill up the inventory with capable attack helicopters that are built on the European continent.

From another perspective, not only the quality of the equipment but also the quantity constitutes an important aspect of effective conduct of warfare, as seen in the Ukrainian war where despite the immense aid of the European states, inventories are near empty and production cannot keep up with what Russian production lines are capable of. Türkiye would be a great addition to the supply chain for many reasons. First, Türkiye has the manpower, political will, and the public support for sustained defence spending leading up to the efficient production line. Turkish Armed Forces have been in active combat against insurgency and regular army (although their quality is questionable) for more than 40 years adopting many different military doctrines and implementing advancing technologies in its operations. Turkish army has a force of 350.000 active personnel, almost double the size of the German forces, and 380.000 reserve which is 10 times bigger than its German counterpart. Despite her fragile economy, Türkiye spends 1.31% of her GDP on Defence while Germany, the biggest and arguably the strongest economy in Europe, spends merely 1.5% of it as of 2023. Turkish domestic production capabilities meet the national armed forces' needs, despite multi-faceted production lines ranging from ammunition to rifles, from ships and armoured vehicles to planes and drones. While meeting the national demand, Turkish companies are also capable of sustained export, and this resilience is shown through newly acquired contracts from Europe to Gulf. What Turkish Defence Industry needs is sustained investment to build up more capabilities to increase the production. Germany in this regard can invest in joint defence production agreements that would benefit both parties, and in the long term, the defence of the Union and the Continent.

Figure 7: German and Turkish Defence Companies among the Global Top 100



Source: 'Top 100 Defense Companies for 2023' Defense News (2023) <<https://people.defensenews.com/top-100/>>.

The potential of Turkish companies can be observed in the graph above, where 4 prominent Turkish companies are among the global top 100, some surpassing their German counterparts. As recently the German Chief of Defence stated, there is a possibility of military confrontation between Germany and Russia in the upcoming 5 years, and German industry is a big limitation in preparedness, Germany needs immediate solutions to fix this and Turkish agreements may be a viable option.⁸¹ A similar proposal came from Czechia, as President Pavel stated a possibility to buy ammunition from third countries including Türkiye to provide sustainable aid to Ukraine, yet this meets political opposition from Greece and France given the political tension.⁸² This is why the German political will is important to pivot to Türkiye in joint armament programmes as a pioneer. Given the high security issues and as a possible short/mid-term solution, German initiative may entice others to cooperate through agreement negotiation which could be hard but not impossible. In this context, since the acquisition of \$400 from Russia, Türkiye is accused of being “close” with Russia, however, this is not correct. It is true that Türkiye

81 Nate Ostiller, 'Top German General: "We Must Be Ready for War (with Russia) in 5 Years"' *The Kyiv Independent* (10 February 2024) <<https://kyivindependent.com/top-german-general-we-must-be-ready-for-war-with-russia-in-5-years/>>.

82 Martin Fornusek, 'Pavel: Czechia Can Deliver 800,000 Shells to Ukraine If Allied Financing Secured' *The Kyiv Independent* (17 February 2024) <<https://kyivindependent.com/czechia-can-deliver-hundreds-of-thousands-of-shells-to-ukraine-if-allies-contribute/>>.

follows a balanced diplomacy, yet this is a result of necessity but not choice. Türkiye's aforementioned quest for Patriots led to the S400 deal. Turkish attempts to cooperate with the US in Syria failed, and with subsequent withdrawal, pushed Türkiye to cooperate with Russia despite heavy political and personal opposition from Erdogan against al-Assad, and Turkish dependence on energy and tourism from Russia limits her diplomatic options. Despite all, Türkiye was one of the first countries to condemn Russian attacks on Ukraine and tried to bring parties to the negotiating table for international order through agreements such as the Grain Deal, and through mediation by inviting both parties to Türkiye with varying success. Ukraine has also agreed on Turkish companies taking part in Ukrainian reconstruction, and Türkiye has been giving consistent support to Ukraine on UN voting.⁸³ Consequently, Turkish-European bilateral relations are not consistently stable, yet there is a room for agreement through common aims in defence industry as Germany would use rising Turkish defence industry to improve long-neglected armed forces, and Türkiye would benefit from sustained German investment.

⁸³ 'Turkey, Ukraine sign document allowing Turkish firms to help Ukraine's post-war reconstruction' Reuters <<https://www.reuters.com/world/turkey-ukraine-sign-document-allowing-turkish-firms-help-ukraines-post-war-2024-01-31/>> accessed 22 February 2024.

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