



Recalibrating Turkish Defence Industry – Challenges for NATO Partners

By Jens Bastian*

Over the past decade, Turkey's defence industry has undergone rapid development. Its products have repeatedly proved their military capability. The Bayraktar-TB2 drone – a product of the Turkish manufacturer Baykar – is exported to 31 countries. In Ukraine, it is being used extensively against the Russian invading army. In Nagorno-Karabakh, it turned out to be a game changer in favour of Azerbaijan in the conflict with Armenia. It has left its mark on the battlefields of Syria as well as in northern Iraq and Libya. The TB2 drone is only the most visible sign of what is a new era for Turkey's defence policy. For Turkey's NATO partners, this recalibration presents strategic challenges for further cooperation with Ankara.

Turkey is refusing to march in lockstep with

NATO and the EU, having declined to adopt sanctions against Moscow outside the UN framework. Today's redrawn geopolitical map includes middle powers – such as Turkey – that are demanding agency over specific outcomes. At the same time, these countries balk at being drawn into binary great-power rivalries. President Erdogan is leveraging Turkey's middle power position by expanding the country's arms exports and broadening the range of countries it supplies. Demand for its weapons systems suggests Turkey is increasingly viewed as an important player on international weapons markets, reinforcing Ankara's strategic standing in global foreign and defence policy.

In the foreseeable future, Turkey will continue to depend not only on the US for its air defence but also on its NATO partners in Europe. Meanwhile, there is an accelerating arms race between Turkey and Greece in

the eastern Mediterranean. In 2022, the government of Prime Minister Mitsotakis agreed to purchase six Rafale fighter jets from France and 40 F-35 stealth fighter jets from the US. Such developments call into question the military superiority of the Turkish Air Force over its Greek counterpart.

The success of Turkey's drone exports and the decision of the State Department to approve the sale of F-16 aircraft and possibly Eurofighter jets by Germany and Italy is not only about sophisticated weapons systems. Nor is it just a commercial transaction. Indeed, the developments need to be seen in the broader context of NATO interoperability – that is, keeping Turkey in alliance-led military-industrial systems. This implies both costs and risks. Turkey's continued participation in NATO is central to the security interests of the alliance. The transformation of the Turkish defence indus-

try over the past two decades goes hand in hand with the redefinition of Ankara's geostrategic interests.

This gives Erdogan political sway that goes beyond military might and institutional arrangements. Turkey is pursuing a strategy of multi-alignment. Ankara is currently forging a growing number of bilateral alliances in the area of arms exports to countries outside NATO that until recently were considered closed or inaccessible to Ankara. The expanding cooperation networks are characterized by regional diversification. Turkey's objective is to make strategic use of arms exports – that is, to embrace countries with which other NATO members are reluctant to cooperate, such as Saudi Arabia, Taiwan and China.

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