

TURKISH – GERMAN STRATEGIC TIES IN CONTEXT: DEFENSE COOPERATION AND POLITICAL-MILITARY AGENDA OF BILATERAL RELATIONS

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Abstract

In times of the COVID-19 crisis and economic downturn, finding suitably sized markets for European arms exports becomes particularly important as a significant income generator. A NATO member, Turkey, looms large as an optimal buyer for European defense solutions with its increasing security needs, high defense spending, and ambitious military modernization agenda. At present, Turkish indigenous capabilities account for approximately 65 percent of the Turkish Armed Forces' warfighting arsenal – albeit the nation's system and sub-system reliance continues –.

The Turkish – German defense cooperation has an enormous significance as to the Turkish military capabilities, especially in submarine warfare. Our findings showcase that while Germany will witness a downtrend in land warfare systems – related to Turkey's indigenous platforms entering in service

–, the Turkish Navy will still need Germany's exports. When it comes to air warfare and air defense systems, the BAE Systems and EUROSAM remain Turkey's top two European partners, leaving little room to the German arms sector. Nevertheless, at a time of Countering America's Adversaries Through Sanctions Act (CAATSA) times stemming from the US, the European angle of Turkey's defense eco-system remains of utmost importance.

Even though Germany was critical of Turkey's Operation Spring Shield and Operation Peace Spring, along with other political problems between the two nations, it needs to maintain its interests as a rising arms exporter and a NATO-member country with strong strategic interests tied to Turkey's military policy. Therefore, the German arms restrictions on Turkey are destined to remain short-lived.

Key words: Germany, Turkey, defense cooperation, Type-214, Reis-class, geopolitics, military, arms trade.



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Introduction

Despite political tensions and upheavals in their relations, the defense cooperation and strategic ties between Turkey and Germany have generally proved to be resilient against political turmoil. After all, Turkey remains a regional pivot with improving military capabilities. It is the top importer of German weaponry and an important receiver of German arms technologies. Turkey's several important modernization agendas, such as the Type-214 submarine derivative (Reis-class submarine) and several land warfare projects, depend on the German supply chain and technological know-how. Therefore, it is a market with lucrative opportunities for German arms industries.

Germany also needs Turkey for its gatekeeping role, buffering human security crises, in addition to the sustainability of its

high arms exports revenues.

The defense policy dimension of the Turkish – German bilateral ties is extremely intertwined with economics and politics. To better understand this cooperation, this paper firstly examines the political determinants of the defense transactions and describes the historical background of the relationship. Second, it looks into several important milestones. The report then touches upon the importance of German technology and know-how for the Turkish military capabilities. Subsequently the report analyses how Turkey's Syrian campaigns have soured the relationship between the two countries. Lastly, the report concludes its findings by analyzing the future political-military trajectories of the relationship.

The Turkish – German Defense Relationship in Political Context

As of 2019, with almost three thousand members, Germany enjoys the second-largest defense cluster in Europe after France¹. Besides, the nation's military spending rose by 10 percent in 2019, to \$49.3 billion, marking a good uptrend. This was the largest increase in spending among the top 15 military spenders in the same year². This impressive outlook translates into a sophisticated network of research institutions and defense producers, generating a techno-industrial and defense scientific base for the German arms sales.

Arms sales have long made lucrative revenue generators for leading European countries.

Especially in times of economic turbulences, European governments need to find suitably sized markets to sell weapon systems³. Letting political divergences aside,

with its growing border security needs, high defense spending, growing military activism and thorough defense modernization programs, Turkey, being a NATO ally, makes an ideal client for European defense solutions.

Turkey has been ranked a top recipient of German arms exports⁴, reaching the highest level in recent 14 years in 2019 despite political bonanza going on between the Turkish administration and European nations⁵. The uptrend signals a growing, pragmatic convergence between Turkey and Germany in defense cooperation. Should this trend continue, and if it could resist the political turmoil, technically, the future of the partnership seems bright and promising. However, the Turkish – German defense cooperation cannot be seen in isolation from the political pillar of the bilateral ties.

With a large number of Turkish society and its crucial role in

1 Fiott, D. (December, 2019). "Strategic Investment: Making geopolitical sense of the EU's defence industrial policy". European Union Institute for Security Studies. https://www.iss.europa.eu/sites/default/files/EUISSFiles/CP_156.pdf

2 SIPRI. (April 27, 2020). "Global military expenditure sees largest annual increase in a decade – says SIPRI – reaching \$1917 billion in 2019". SIPRI. Retrieved December 15, 2020 from <https://www.sipri.org/media/press-release/2020/global-military-expenditure-sees-largest-annual-increase-decade-says-sipri-reaching-1917-billion>

3 European Union Institute for Security Studies. (December 2019). "Strategic Investment: Making geopolitical sense of the EU's defence industrial policy". European Union Institute for Security Studies. <https://www.marketresearch.com/product/sample-8827359.pdf>

4 Duvar English. (May 5, 2020). "Turkey main recipient of German arms exports in 2019". Duvar English. Retrieved November 23, 2020 from <https://www.duvarenglish.com/diplomacy/2020/05/05/turkey-main-recipient-of-german-arms-exports-in-2019>

5 Deutsche Welle. (October 17, 2019). "German arms exports to Turkey at highest level since 2005". Deutsche Welle. Retrieved November 23, 2020 from <https://www.dw.com/en/german-arms-exports-to-turkey-at-highest-level-since-2005/a-50866242>

Turkey's EU Accession Process, Germany looms large as a key enabler of the European-Turkish strategic dialogue. Turkish-German relations are based on a 'conflicting cooperation pattern', which, in a carefully balanced dichotomy, highlights convergence in some regards with instances of divergence, or even conflict, in some others at the same time⁶. This very dichotomy leads to a dynamic, multidimensional relationship with geopolitical crossroads, opportunities, as well as political-military and political-economic cliffs.

There have been certain milestones in contemporary Turkish - German bilateral ties. Each dictated which side of the dichotomy towers over the other side in time, marking a textbook fluctuating trajectory.

The first milestone of recent times was the positive turn in December 1999 with the Helsinki Summit when European Council approved Turkey's EU destiny. The second development came in 2013 along with the consolidation of Turkey's dialogue and bilateral visits. In the same year, the German-Turkish Strategic Dialogue Mechanism was set to strengthen the political dialogue between the two countries. The third development put a strain on the relationship, marking the start of a period characterized by 'political skepticism'⁷. In the aftermath of the Gezi protests in 2013, Germany condemned Turkey's response and blocked the EU accession talks. Fourth, with the help of Turkey's strong leverage on the humanitarian crisis emanating from Syria, Germany's stance improved in correlation with Turkey's

offer to help in mitigating the refugee influx. Alarmed by the developments at the EU's doorstep, Germany adopted a pragmatic, transactional, and, in essence, positive approach towards the Turkish administration. The fifth and last development came through the mid-2016 to 2019 and onwards. The German Parliament's resolution as to the Armenian issue, its critics of Turkey's governance in the post-coup period and Turkey's retaliation by banning German visits to the military base in Incirlik hurt the bilateral relations⁸. However, again in 2016, the relations took a new turn with the outbreak of the Eurozone and the refugee crises, which reminded the EU about the importance of maintaining positive bilateral relations. In 2018 and 2019, eventually, Turkey's Syria campaigns have triggered yet another downtrend in the bilateral ties.

The missile defense assistance within NATO capacity marked a good case, showcasing the everlasting fluctuation between the two countries. In the face of the ballistic missile threat posed by the Syrian Arab Armed Forces amidst the civil war, in 2013, the US, Germany, and the Netherlands provided Turkey with six Patriot air and missile defense batteries⁹. The deployments highlighted a firm support to Ankara's national defense concerns. However, later, all the initial Patriot provider countries decided to withdraw their batteries from Turkey (the Netherlands in 2014, the US and Germany in 2015)¹⁰. Although the explanations focused on technical grounds and changes in the threat assessment, Turkish policy community considered the withdrawals to be politically motivated amidst divergences in Syria¹¹.

⁶ Conflictual cooperation means that cooperation in some areas exists, with instances of disagreement and even conflict in others (Ergun et. Al, 2018).

⁷ To read more about the concept of "political skepticism" in the Turkish – German context, see Ergun et. Al. (2018).

⁸ Turhan, E. (June, 2016). "Europe's Crises, Germany's Leadership and Turkey's EU Accession Process". Global Diplomacy Lab. Retrieved November 10, 2020 from <https://global-diplomacy-lab.org/files/forum-2016-2-turhan-turkey-germany-june.pdf>

⁹ NATO. (February 16, 2013). "All NATO Patriot batteries in Turkey operational". NATO. Retrieved January 12, 2020 from https://www.nato.int/cps/en/natohq/news_98494.htm

¹⁰ Bekdil, B, E. (August 17, 2015). Defense News. Retrieved January 12, 2020 from <https://www.defensenews.com/land/2015/08/17/us-germany-to-withdraw-patriots-from-turkey/>

¹¹ Özcan, C., Yezdani, I. (August 18, 2015). Hurriyet. Retrieved January 12, 2020 from <http://www.hurriyet.com.tr/dunya/nyt-patriotlarin-cekilecegi-soylendiginde-turk-yetkililer-mosmor-oldu-29837490>

The European Anchor and Europe's Gatekeeper: An Interesting Relationship

Germany is aware that Turkey is an important, 'European-gatekeeping' ally that is critical to protect regional stability. The two countries have a multi-facet relationship in NATO, the G20, and the Organization for Security and Cooperation in Europe (OSCE), in addition to their bilateral strategic dialogue.

As to engagement with Turkey, the EU has been internally divided. While several countries such as France and Greece, have formed a camp critical of Turkey's geopolitical actions, other countries like Germany and Malta adopted a more neutral, or constructive, stance. Germany and Turkey also cooperated on several political-security matters such as the fight against terrorism and governance of migration. The two countries also share common perspectives on affairs related to international security and the security of energy supplies.

Turkey and Germany have built various channels of political communication. In the aftermath of the tensions, the transition into a normalization period was made possible through these channels. The bilateral visits by Foreign Minister Mevlüt Çavuşoğlu and his counterparts, as well as President Erdogan's visits to Germany in September 2018 were important milestones in the normalization process¹². Through 2020, Chancellor Merkel has continued to keep bilateral dialogue open and adopted the role of a mediator between Turkey and Europe.

Despite its changing stance towards Turkey, Germany has

been an anchor in keeping Turkey's European agenda going. For example, in 2017, in the transition to the normalization period, Germany rejected calls for EU to end Turkey accession talks¹³, urging its EU allies not to end accession talks, saying that the country is key to European political and security interests¹⁴. With its cumulative political power and economic stability, Germany is an important enabler for Turkey in its relations with the EU.

Germany's political leverage was also conducive to finalizing the EU-Turkey refugee deal in 2016. From 2015 onwards, Chancellor Merkel has been a leading figure and paved the way to a constructive dialogue between its European peers and Turkey by claiming that the "EU is ready to open new chapters" and that "Turkey plays a key role" for Europe in managing migration¹⁵. Despite the changing dynamics regarding the German role in Turkey's EU accession, several important aspects loom large in the partnership. For example, the joint decision body of the 'German-Turkish Strategic Dialogue Mechanism'¹⁶ is an initiative worthy of consideration. The mechanism is particularly important to give an institutionalized perspective and a strategic depth to the Turkish-German relations¹⁷. So far, the platform served as a platform for important joint political decisions such as the formation of working groups for mutual problems, fighting terrorism, managing migration and foreign/security policy¹⁸. Such initiatives signal that both parties might potentially want to expand their ongoing agendas of strategic cooperation. Yet, Turkey's Syrian wars have turned the table in time.

¹² For more information, see <http://www.mfa.gov.tr/reasons-between-turkey-and-the-federal-republic-of-germany.en.mfa>

¹³ Gabriel, S. (April, 28, 2017). "Germany rejects calls for EU to end Turkey accession talks". Deutsche Welle. <https://www.dw.com/en/germany-rejects-calls-for-eu-to-end-turkey-accession-talks/a-38629155>

¹⁴ Gabriel, S. (April, 28, 2017). "Germany rejects calls for EU to end Turkey accession talks". Deutsche Welle. <https://www.dw.com/en/germany-rejects-calls-for-eu-to-end-turkey-accession-talks/a-38629155>

¹⁵ Turhan, E. (June, 2016). "Europe's Crises, Germany's Leadership and Turkey's EU Accession Process". Retrieved November 10, 2020 from <https://global-diplomacy-lab.org/files/forum-2016-2-turhan-turkey-germany-june.pdf>

¹⁶ For more information, see <http://www.mfa.gov.tr/the-second-meeting-of-the-strategic-dialogue-mechanism-between-turkey-and-germany-held-in-istanbul.en.mfa>

¹⁷ For more information, see <http://www.mfa.gov.tr/the-second-meeting-of-the-strategic-dialogue-mechanism-between-turkey-and-germany-held-in-istanbul.en.mfa>

¹⁸ For more information, see <http://www.mfa.gov.tr/the-second-meeting-of-the-strategic-dialogue-mechanism-between-turkey-and-germany-held-in-istanbul.en.mfa>

Deep Dive into the Divergences

Against the backdrop of Turkey's cross-border operations into Syria, Europe's common position was to adopt arms restrictions against Turkey.

Political reactions from the allies to Ankara's recent cross-border campaign, particularly the ones extending to the defense sector, remain the chief divergence factor. This very divergence is also a driver of Ankara's geopolitical identity shift. Although there was no union-wide arms embargo, all the EU member states exercised several weapons exports restrictions to Turkey. The US also decided to take tough measures, accompanying the European policy.

Senator Lindsey Graham even tweeted stating that he was working with Senator Chris Van Hollen to introduce bipartisan sanctions, calling for Turkey's suspension from NATO unless Ankara ceased the military action¹⁹. In fact, back in 2016, it was Senator Graham himself who criticized then Secretary of Defense Ashton Carter for the Obama administration's support to the PYD / YPG in Syria (under the banners of Syrian Democratic Forces / SDF) due to these groups' substantial ties to the PKK which is designated as a terrorist organization also by the US²⁰.

In 2018, although many European countries, including Germany, have criticized Operation Olive Branch, embargos or sanctions were not harshly brought to the table. Germany even stated that Turkey had "legitimate security interests"²¹ along its Syrian frontier, despite criticizing the campaign.

Still, the Merkel administration took action to halt much of its

ongoing arms and defense cooperation with Turkey except for maritime equipment. During the campaign, it turned down an upgrade request for Turkey's Leopard 2 tanks (later on, Ukraine snatched up the active protection system deal) and decided not to deliver arms to conflict zones of the Turkish Armed Forces²². In meantime, however, despite the criticisms, the German cabinet approved a large arms exports package to countries in conflict areas, including Turkey.

Berlin, in recent years, also set new record numbers in weapon exports, even though it has pledged to reduce or halt arms trade with Ankara²³. A third of Germany's weapons exports were to Turkey, accounting for millions of Euros²⁴. On the other side of the coin, German authorities told that they were concerned about the scope of Turkey's Syria campaigns.

Turkey's third expedition into the Syrian battleground, Operation Peace Spring, 2019, amplified these concerns. In result, Germany's reactions were harsher. Amidst the offensive, Europe's almost common position was to react with arms trade restrictions against Turkey.

With Operation Peace Spring, 2019, as Ankara faced sanctions and restrictions in arms trade from nearly all the EU members, the German Foreign Office strongly condemned the campaign. German Parliamentary Research Service even claimed that the operation was "illegal on all counts"²⁵. Germany has also halted its arms exports in the aftermath of the Peace Spring. However, approximately shortly after

¹⁹ Graham, L. (October 7, 2019). "Just spoke to Sen @ChrisVanHollen about situation in Syria". Retrieved January 14, 2020 from <https://twitter.com/LindseyGrahamSC/status/1181219542778953728>

²⁰ Graham, L., Ashton, C. (July 23, 2017). "American Defense Secretary Ashton Carter confirms "substantial ties" between the PYD/YPG and PKK". Retrieved January 14, 2020 from <https://www.youtube.com/watch?v=4GUdQJle-1s>

²¹ Daily Sabah. (January 20, 2018). "Germany: Turkey has legitimate security interests in Syria". Daily Sabah. Retrieved November 5, 2020 from <https://www.dailysabah.com/politics/2018/01/20/germany-turkey-has-legitimate-security-interests-in-syria>

²² "Germany halts plans to upgrade Turkey's Leopard tanks". DW, <https://www.dw.com/en/germany-halts-plans-to-upgrade-turkeys-leopard-tanks/a-42305167>, 25 January 2018, accessed on: 5 November 2020.

²³ Deutsche Welle. (January 25, 2018). "Germany's cabinet approved record-breaking arms exports". Deutsche Welle. Retrieved November 5, 2020 from <https://www.dw.com/en/germanys-cabinet-approved-record-breaking-arms-exports/a-42282068>

²⁴ Duvar English. (November 29, 2019). "Germany approved 3 million euros worth of arms exports to Turkey since launch of Operation Peace Spring: Report". Duvar English. Retrieved November 5, 2020 from <https://www.duvarenglish.com/diplomacy/2019/11/29/germany-approved-3-million-euros-worth-of-arms-exports-to-turkey-since-launch-of-operation-peace-spring-report/>

²⁵ Just Security. (November 15, 2019) "Turkey's Syria Invasion: German Research Report Says Illegal on All Counts". Retrieved November 4, 2020 from <https://www.justsecurity.org/67219/turkeys-syria-invasion-german-research-report-says-illegal-on-all-counts/>

the decision, Germany approved a record-high 3.09 million euros worth of arms exports to Turkey²⁶. Berlin claimed that

the exports excluded weaponry which was deemed related to carrying out war crimes in Syria.

A New Turkey and Its New Military Geopolitical Outlook

Back in the 1990s, Turkey's military policy was based on two key pillars. First of all, there was the *Milli Askeri Stratejik Konsept* (the National Military Strategic Concept pioneered by the military leadership of then Chief of Staff (1998 – 2002) General Hüseyn Kivrikoğlu. The concept's strategic thought was centered on the 'active deterrence' strategy, envisaging the use of coercive force to address security threats at their source. The second – and more foreign policy driven – pillar was the 'Two-and-a-Half War' military-geostrategic paradigm. The 'two wars' referred to the combat readiness to fight simultaneous, inter-state armed conflicts in the eastern and western fronts, while the 'half war' referred to large-scale counter-terrorism operations against the PKK²⁷.

The Erdoğan administration now shows political-military interest in a broader axis and the Turkish Armed Forces enjoy a stronger defense industry backing new aspirations. Besides, the ultra-secularist military elite of the 1990s has been replaced by conservative AK Party governments. Consequently, for example, the Turkish-Israeli military cooperation gave way to the Turkish – Qatari security and defense partnership. Yet, at the end of the day, Turkish statecraft's active military manifestation is long-lasting.

While Ankara has pursued more aspirant military policies, Turkey's relations with the West have never followed an easy track. Yet, recent fluctuations have brought about a "succession of crises²⁸" that can potentially bring about structural outcomes. Although Turkey is still, formally, a candidate for the European Union membership, the accession process is practically over. At present, Turkey's main importance for Europe is to keep the continent safe

from the humanitarian consequences of the Middle Eastern conflicts as manifested in the 2016 'refugee deal'²⁹. Mutual estrangements remain strong on both sides. While the Turkish administration is disappointed by the European nations' lack of political solidarity after the failed coup attempt – a very traumatic incident noting that even the Turkish Parliament was targeted by the plotters –, many in Europe have long been criticizing the current state of liberal democratic values in Turkey. Moreover, while a populist uptrend in politics has given rise to anti-Turkey sentiments, Ankara's current geopolitical worldview bears notable Western-skeptic aspects as well³⁰.

What makes the current state of Turkey's strategic ties with the West more complicated is the 'Russia factor' following the 2016 coup attempt. As a 2019 Swedish Defense Research Agency (FOI) paper underlines:

President Putin is using Turkey's wounded national pride and President Erdoğan's mistrust of the West to make inroads in the republic. A new partnership is emerging between the old rivals on the Black Sea. Although Ankara values its membership in NATO, it is frustrated by its Western allies³¹. Turkey's purchase of Russia's S-400 air defense system is therefore a geopolitical signaling to the West. ... Following Russia's annexation of Crimea in 2014, and the stand-off between Russia and Turkey in Syria in 2015, a Turkish rapprochement with Moscow seemed inconceivable, but Putin changed the geopolitical balance at a key moment. After the failed coup in Turkey on 15 July 2016, Putin was one of the first world leaders to call Turkey's president to express his support³².

²⁶ Duvar English. (November 29, 2019). "Germany approved 3 million euros worth of arms exports to Turkey since launch of Operation Peace Spring: Report". Duvar English. Retrieved November 4, 2020 from <https://www.duvarenglish.com/diplomacy/2019/11/29/germany-approved-3-million-euros-worth-of-arms-exports-to-turkey-since-launch-of-operation-peace-spring-report/>

²⁷ Elekdag, S. "2 ½ War Strategy? Perceptions (March-May 1996).

²⁸ Soli, O. (2019). At the End of the Day Where will Turkey Stand? IAI. p.5.

²⁹ Soli, O. (2019). At the End of the Day Where will Turkey Stand? IAI. p.5.

³⁰ Soli, O. (2019). At the End of the Day Where will Turkey Stand? IAI. p.5.

³¹ Hammargren, B. (2019). "Turkey's Tightrope Act: Staying in NATO while Warming towards Russia" FOI.

³² Hammargren, B. (2019). "Turkey's Tightrope Act: Staying in NATO while Warming towards Russia" FOI.

Syria has turned into another flashpoint and manifestation of the Turkish – Western divergences. Turkey had traditionally pursued a policy of non-interference in the internal affairs of its Arab neighbors. This policy was even more visible when it comes to intra-Arab affairs. Yet, the Arab uprisings, especially the Syrian Civil War in this regard, have changed everything³³. Ankara, at least for a few years, has prioritized the demise of the Assad rule. This aspiration worsened border security along the Syrian frontier and brought about a militancy problem. In time, Syria has turned into a war-

fighting arena for radical extremists. Turkey itself has been targeted by terrorism many times, namely with attacks from ISIS and PKK. Changes in the “Kurdish dynamics” also became yet another consequence of the Syrian Civil War³⁴. Especially the US’ cooperation with the PKK terrorist organization-affiliated PYD (the political wing) / YPG (the military wing) groups within the Syrian Democratic Forces (SDF) framework has significantly worsened the Turkish – Western relations.

Turkish Defense Sector in Context

Turkey has a burgeoning defense technology industrial base (DTIB) with portfolio worth billions of dollars and seven companies, as of 2020, making it to Defense News’ reputable Top 100 list³⁵. In particular, drones loom large among the Turkish defense industry’s ‘best-seller’ solutions. Turkey’s unmanned aerial systems (UAS) have already made it into the Ukrainian, Azerbaijani, and Qatari arsenals and the country is looking for new opportunities, especially in the Asian weapons markets.

In the 2000s, Ankara has managed to surf on an uptrend wave in its military modernization programs. In the meantime, the Turkish military has kept fielding a robust war-fighting deterrent. Especially, the Syrian expeditionary campaigns, starting from the Euphrates Shield back in 2016 to date, have given a true boost to Turkey’s defense industries in testing indigenous weaponry in real combat settings. Turkey’s weapons market is a very lucrative one for foreign suppliers. In 2018, Ankara spent some \$12.98 billion in defense, ranking the 7th within the NATO and 18th globally³⁶.

Back in 2004, Ankara called-off various acquisition projects worth \$11 billion in total at the time. The decision was

based on encouraging indigenous industrial involvement in producing conventional warfighting assets³⁷. Since then, Turkish military-industrial capacity has expanded exponentially. As Turkey’s defense technological and industrial base designed, produced and combat-tested more indigenous weapon systems, its arms sales saw a boost as well. Between 2007 and 2011, Turkish arms sales grew by 75% while indigenous production of overall weaponry in the Turkish military’s arsenal rose to 52% in 2011 from 42% back in 2009³⁸.

Having digested the 2007 – 2011 period’s uptrend, Turkey’s consecutive defense modernization strategic plans (2012 – 2016 and 2017 – 2021) aimed at boosting national industries’ involvements in more advanced and aspirant projects. Notably, the 2018 – 2022 defense industry sectoral strategy document (*Savunma Sanayii Sektörel Strateji Dokümanı*) has set the bar high by adopting the goal of “technology and sub-systems ownership to facilitate a sustainable defense industry” to augment Turkey’s new geopolitical sail towards more strategic room to move³⁹. The contemporary 2019 – 2023 strategic plan, for the first time since the first announcement of the documents in kind,

³³ Kirisci, K., Sloat, A. (2019). “The Rise and Fall of Liberal Democracy in Turkey: Implications for the West”. Brookings. pp.6-7.

³⁴ Kirisci, K., Sloat, A. (2019). The Rise and Fall of Liberal Democracy in Turkey: Implications for the West. Brookings. pp.6-7.

³⁵ Daily Sabah. (August 17, 2020). “7 Turkish defense firms listed among world’s top 100”. Daily Sabah. Retrieved October 6, 2020 from <https://www.dailysabah.com/business/defense/7-turkish-defense-firms-listed-among-worlds-top-100>.

³⁶ IHS Jane’s. (October, 2018). Navigating the Emerging Markets. Turkey. p.4.

³⁷ Hurriyet. (May 14, 2014). Tank ve helikopter ihaleleri iptal edildi. [Tank and helicopter tenders have been canceled]. Retrieved February 26, 2020 from <https://www.hurriyet.com.tr/ekonomi/tank-ve-helikopter-ihaleleri-iptal-edildi-225670>

³⁸ Galer, A., et al. (March 2018). Turkey: Weapons Production and Procurement 2018 – 2027 Turkish Weapons, IHS Markit Jane’s.

³⁹ Presidency of Defence Industries. 2018 – 2022 Savunma Sanayii Sektörel Strateji Dokümanı. [2018 - 2022 Defense Industry Sectoral Strategy Document].

highlighted technological transformation and the necessary elite workforce as critical enablers of the nation's planned techno-scientific breakthrough in the 21st century⁴⁰. On the positives, landmark techno-scientific events, first and foremost Teknofest⁴¹ and Roboik⁴², continue to attract more young minds into the defense sector day by day. However, the emigration of highly skilled individuals remains a severe issue for Turkey's high-tech driven sectors⁴³.

As Turkey's defense industries gained a visible momentum, Turkish arms sales have gradually climbed up. Back in 2002, Turkish weaponry saw less than \$250 million exports, then rose to \$487 million in 2006⁴⁴, \$1.953 billion in the year 2016, and \$2.188 billion in 2018⁴⁵. Turkey can now design and produce, though in various proportions of indigenous sectoral contribution, land warfare platforms, land-based fire support systems (multiple launch rocket systems and howitzers), attack helicopters, and even Bora, the nation's first tactical ballistic missile with the export variant, the Khan missile. Furthermore, critical projects, such as the TCG Anadolu amphibious assault vessel, ATAK-2 heavy gunship, Altay main battle tank, , and the 5th generation national combat aircraft (MMU – Milli Muharip Uçak, formerly TF-X) in cooperation with the British BAE systems loom large within the key military modernization portfolios.

Drone warfare has a special meaning for the Turkish defense industry. Turkey's policymakers and its defense industry

elite's approach consider unmanned military systems and robotic to be opportunities enabling a geopolitical breakthrough. Ankara is a textbook latecomer of traditional military industries. Simply put, Turkey will produce its main battle tank, Altay, somewhat belatedly in the 2020s, despite the very bitter fact that tanks have been fighting their battles for about one century. However, the ongoing unmanned systems revolution, coupled with artificial intelligence and robotics, is drastically leading to a paradigm shift in defense technological and industrial bases around the globe. At times of leaps, second-tier actors of the old paradigm could take advantage of the emerging conditions and improve their capacities⁴⁶.

Turkey's tactical and medium-range / long altitude UAS, principally Bayraktar TB-2 and ANKA, have proved themselves in challenging hybrid warfare battlefields of Syria. Especially, the Turkish drones' hunt for the Syrian Arab Armed Forces' Russian-manufactured Pantsir short-to-mid range air defenses has sensationally resonated with the international military strategic community⁴⁷. In the coming years, more advanced platforms that can execute strategic missions will enter into service. The Akinci unmanned aerial system, for example, will enjoy 1,350-ton payload and advanced systems, such as AESA radar and AI-assisted avionic⁴⁸. Aksungur UAS will be a key asset in anti-submarine warfare with its sonobuoy pod and maritime patrol surveillance features⁴⁹.

⁴⁰ Kasapoglu, C. (2020). "Turkey's Defense Outlook for 2020s Very Promising". Anadolu Agency. Retrieved February 26, 2020 from <https://www.aa.com.tr/en/analysis/turkey-s-defense-outlook-for-2020s-very-promising/1691178>

⁴¹ Teknofest. Retrieved February 27, 2020 from <https://www.teknofest.org/#>

⁴² Roboik. Retrieved February 27, 2020 from <https://roboik.ssb.gov.tr/>

⁴³ Efstathiou, Y., Waldwyn, T. (April, 2019). "Turkish Defence Exports to 2023: Grand Ambitions". IISS Military Balance Blog. Retrieved February 28, 2020 from <https://www.iiss.org/blogs/military-balance/2019/04/turkish-defence-exports>

⁴⁴ Presidency of Defence Industries. 2018 – 2022 Savunma Sanayii Sektörel Strateji Dokümanı. [2018 - 2022 Defense Industry Sectoral Strategy Document].

⁴⁵ Presidency of Defense Industries. 2019 – 2023 Strategic Plan. pp.32-26.

⁴⁶ Kasapoglu, C., Kirdemir, B. (2018). The Rising Drone Power: Turkey on the Eve of Its Military Breakthrough. EDAM. pp.18-19.

⁴⁷ Axe, D. (March, 2020). "Guess Who is a Drone Power Now? Turkey", The National Interest. Retrieved April 2, 2020 from <https://nationalinterest.org/blog/buzz/guess-who%E2%80%99s-drone-power-now-turkey-133702>

⁴⁸ Baykar. Retrieved April 2, 2020 from <https://baykardefence.com/uav-14.html>

⁴⁹ TUSAS. Retrieved April 2, 2020 from <https://www.tusas.com/uploads/2019/12/aksungur-flyer.pdf>

The Manifestation of Turkey's New Military Outlook: The 2020 Nagorno-Karabakh War

Azerbaijan's recent military victory in Nagorno-Karabakh offers a good explanation and case study to better grasp Turkey's new defense outlook.

Revolving around the famous *İki Devlet Bir Millet* (two states, one nation) paradigm, two major frameworks form the legal basis of the contemporary defense relations between Baku and Ankara. The military cooperation deal, dating back to the 1990s, primarily regulates personnel exchanges and training programs. The 2010 Agreement on Strategic Partnership and Mutual Support (ASPMS), with its broader content, has transformed the bilateral ties into a real military alliance. Referring to the UN Charter, Article 51, the ASPMS registers a *casus foederis*, obligating the parties to cooperate to the extent of their preference against any aggression from any actor. The ASPMS' Article 7 underlines that the two states' militaries shall coordinate their force structures, paving the ground for extensive joint drills⁵⁰.

The Turkish and Azerbaijani militaries conduct regular exercises in the Azerbaijani principle, the strategic enclave of Nakhchivan, and Turkey. While the TurAz Eagle and Falcon drills deal with air warfare tasks, the two armies often train to boost their combined arms warfare capabilities too. The defense transactions pillar is considered to be an allied capacity-building effort through which Ankara systematically supports Baku.

The Turkish-Azerbaijani joint drills are deliberately designed to mimic the combined arms warfare characteristics of the Nagorno-Karabakh conflict zone. Combined arms warfare, in essence, is the structured integration of infantry, heavy-

armor and mechanized formations, indirect fires (land-based fire-support, primarily artillery and rocket forces), as well as close-air-support within synchronized operational cohesion. Each unit type and weapon system are tasked to leverage one another's capabilities, producing a force-multiplier effect in the overall warfighting capacity⁵¹. Some writings consider this way of warfighting to be a military symphony⁵². As the ongoing defense technological breakthrough unfolds, traditional combined arms warfare demands more complex features through the incorporation of drone warfare and robotics, cyber-electronic warfare, artificial intelligence-based capabilities and advanced sensors⁵³.

The Turkish-Azerbaijani *Sarsılmaz Kardeşlik* (Steadfast Brotherhood) Exercise offers a good example of the aforementioned military-strategic context. In June 2019, the planned drills in Nakhchivan employed all combined arms warfare pieces across the spectrum with some 200 main battle tanks, 5,000 personnel, more than 180 artilleries and MLRS pieces, as well as 21 fixed-wing and rotary-wing aircraft⁵⁴. Another notable effort was the Mustafa Kemal Atatürk Exercise, which took place in Azerbaijani proper in the spring of 2020. Named after modern-day Turkey's founder, the drill showcased mechanized breakthrough offensives synchronized with overwhelming land-based fire support and accompanying close-air-support units⁵⁵.

Notably, the most recent 13-day joint exercise, which took place between July 29 and August 10, 2020 in Nakhchivan and the Azerbaijani principle, deserves the utmost attention, especially considering the CONOPS during the September–October 2020 clashes.

⁵⁰ For the ASPMS full text (in Turkish), see: <https://www.resmigazete.gov.tr/eskiler/2011/05/20110528M1-30-1.pdf>

⁵¹ Samuel, A. P. (February 15, 2020). "How the Army Can Fight and Win the Wars of the Future". The National Interest. Retrieved October 5, 2020 from <https://nationalinterest.org/blog/buzz/how-army-can-fight-and-win-wars-future-123826>

⁵² Osborn, K. (September 16, 2020). "Combined Arms Maneuver: How the U.S. Army Could Beat Russia or China in Battle". The National Interest. Retrieved October 5, 2020 from <https://nationalinterest.org/blog/buzz/combined-arms-maneuver-how-us-army-could-beat-russia-or-china-battle-169025>

⁵³ Osborn, K. (September 16, 2020). "Combined Arms Maneuver: How the U.S. Army Could Beat Russia or China in Battle". The National Interest. Retrieved October 5, 2020 from <https://nationalinterest.org/blog/buzz/combined-arms-maneuver-how-us-army-could-beat-russia-or-china-battle-169025>

⁵⁴ Anadolu Agency. "Türkiye ve Azerbaycan Nahçıvan'da ortak askeri tatbikat başlattı". [Turkey and Azerbaijan have launched a joint military exercise in Nakhchivan. Anadolu Agency]. Retrieved October 5, 2020 from <https://www.aa.com.tr/tr/dunya/turkiye-ve-azerbaycan-nahcivanda-ortak-askeri-tatbikat-baslatti/1499001>

⁵⁵ TRT Haber. (May 3, 2019). "Türkiye-Azerbaycan ortak askeri tatbikatı devam ediyor". [Turkey-Azerbaijan joint military exercise continues]. YouTube. Retrieved October 6, 2020 from <https://www.youtube.com/watch?v=lkY5p4Pgybc>

Turkey and Azerbaijan enjoy promising cooperation in defense transactions, equipping the Azerbaijani military with high-end Turkish weaponry under favorable conditions. These transactions visibly paid off in the September–October 2020 clashes.

Without a doubt, the most salient dimension of the bilateral defense ties remains drone warfare. In fact, in June 2020, Azerbaijan's Defense Minister General Zakir Hasanov hinted at the prospects of acquiring Turkish UAS. The Turkish press reported that Baku then procured the Bayraktar TB-2 armed drones through a 200 million-Turkish lira military aid fund granted by Turkey upon the deal secured by President Recep Tayyip Erdoğan and President İlham Aliyev in February 2020⁵⁶. In his interview with TRT Haber, amidst the ongoing conflict, President Aliyev publicly praised the critical role played by Turkey's unmanned assets in the Azerbaijani offensive when it comes to minimizing casualties and dictating the operational tempo to the adversary⁵⁷.

Capitalizing on the present momentum, Ankara and Baku can work on further cooperation in the unmanned systems segment. *"Turkey's belle époque in drone warfare is yet to come, probably starting within this decade."*⁵⁸ More advanced systems with heavier payloads will enter into service soon. The Akinci (Raider) remains the most noteworthy asset among Turkey's next-generation unmanned military systems. Produced by Baykar, the Akinci has a combat payload of 1,350kg, enabling the platform to carry heavier munitions, such as Tübitak SAGE-modernized MK-82 and MK-83 bombs, the SOM-A indigenous air-ground cruise missile with a 250km effective range, as well as the

indigenous air-to-air missiles Gökdoğan and Bozdoğan. The system will also be augmented by artificial intelligence-based combat capabilities.⁵⁹ The Akinci drone can well find a place in the Azerbaijani arsenal, marking its first export achievement. Another futuristic concept that Turkey could offer to Azerbaijan is the in-progress development of the Akinci and Alpagu complex. The latter refers to the STM-manufactured kamikaze drone weighing 2kg.⁶⁰ According to Turkey's Presidency of Defense Industries, the concept in-progress strives to integrate Alpagu kamikaze drones, in a swarming fashion, with the Akinci UAS, which would function as a battle management node and mother-ship.⁶¹

Azerbaijan has Turkey-manufactured multiple-launch rocket systems (MLR S) in its arsenal. Of these weapons, the 122mm-class MLRS Sakarya and the 300mm-class heavy MLRS TRG-300 Tiger have already been spotted in Nakhchivan, providing robust fire-power for Azerbaijani formations in the strategic enclave.⁶² Building on the success in the MLRS segment, in the coming years, Ankara and Baku can extend their cooperation in land warfare systems to other platforms and more ambitious horizons. Notably, at the time of writing, the Turkish press reported that Azerbaijan may be interested in procuring Turkey's forthcoming main battle tank, the Altay, and its T-129 ATAK gunships.⁶³ If such a deal materializes, it would resonate sensationally with the global strategic community. Azerbaijan, being a former Soviet Union country, predominantly has Soviet-Russian weaponry in its arsenal. According to open-source military databases, the Azerbaijani Army's main battle tank inventory consists of T-55s, T-72s and T-90s, with more than 400 platforms in total.⁶⁴ In the rotary-wing fire-power segment,

⁵⁶ Yeni Safak. (September 30, 2020). "Azerbaycan'ın SIHA'lardan sonra radarındaki iki Türk savunma aracı". [Two Turkish defense vehicles on Azerbaijan's radar after UAVs]. Yeni Şafak. Retrieved October 6, 2020 from <https://www.yenisafak.com/dunya/azerbaycan-sihalaradan-sonra-atak-ve-altay-tankini-da-istiyor-3569153>

⁵⁷ For the interview, see: TRT Haber. Retrieved October 6, 2020 from <https://www.youtube.com/watch?v=J160mkamPIU>.

⁵⁸ Kasapoglu, C. (April 17, 2020). "Turkey's Drone Blitz Over Idlib," Jamestown Foundation. <https://jamestown.org/program/turkeys-drone-blitz-over-idlib/>

⁵⁹ Kasapoglu, C. (April 17, 2020). "Turkey's Drone Blitz Over Idlib," Jamestown Foundation. <https://jamestown.org/program/turkeys-drone-blitz-over-idlib/> For detailed information, see, Baykar. Retrieved October 6, 2020 from <https://www.baykarsavunma.com/iha-14.html>

⁶⁰ STM. Retrieved October 6, 2020 from <https://www.stm.com.tr/en/alpagu-fixed-wing-autonomous-tactical-attack-uav>

⁶¹ TRT Haber. (May 27, 2019). "Taarruzi İHA Akinci'ya sürü drone'lar entegre edilecek". [Swarm drones to be integrated into offensive drones, Bayraktar Akinci]. Retrieved October 6, 2020 from <https://www.trthaber.com/haber/turkiye/taarruzi-ih-akinciya-suru-dronelar-entegre-edilecek-417108.html>

⁶² Azerbaijan Ministry of Defense. (May 2, 2020). "Naxçıvan Qarnizonu Qoşunlarında silah və hərbi texnika yay mövsümündə istismar rejiminə keçirilir". [Weapons and military equipment in the Nakhchivan Garrison Troops are put into operation in the summer]. YouTube. Retrieved October 6, 2020 from <https://www.youtube.com/watch?v=5xOK-sRsmEM&feature=youtu.be>

⁶³ Yeni Safak. (September 30, 2020). "Azerbaycan'ın SIHA'lardan sonra radarındaki iki Türk savunma aracı". [Two Turkish defense vehicles on Azerbaijan's radar after UAVs]. Yeni Şafak. Retrieved October 6, 2020 from <https://www.yenisafak.com/dunya/azerbaycan-sihalaradan-sonra-atak-ve-altay-tankini-da-istiyor-3569153>.

⁶⁴ Military Balance. (2020). IISS. p.185.

which falls under the Air Force in the Azerbaijani doctrinal order of battle, Baku has more than 25 Mi-24 *Hind* gunships along with other transport and general utility platforms.⁶⁵ Therefore, the introduction of principle armored and close-

air-support platforms to the Azerbaijani Armed Forces from a NATO nation, Turkey, would be a critical development in former Soviet space political-military affairs.

Germany and Turkey's Wars

The Turkish military has utilized some of the modern arms it acquired from Germany in its cross-border military operations. Turkey's two largest cross-border operations, Operation Olive Branch and Operation Peace Spring loom large in this context, especially as to Leopard2A4 tanks.

As indicated earlier, Germany's stance towards Turkey's Operation Peace Spring was openly critical. For the first time, the German federal government has announced that it "does not recognize any reasons which legitimize Turkey's attacks against North-East Syria". Consequently, German foreign minister explained that they would not issue new permits for the export of arms which can be used against the 'Syrian Kurds'⁶⁶.

Even though it needs to maintain good relations with its peers within the EU, Germany is aware that it should maintain its interests as a rising arms exporting nation. The partial ban did not seem to have a substantial negative effect on the Turkish-German defense relationship as it was an action constrained by a political necessity rather than a permanent change in the partnership. Remarkably, in 2019, Turkey found itself as the top receiver of German arms, with a trade record of 250.4 million euros⁶⁷. Therefore, when there is a sanction / embargo that can harm the Turkish – German defense relationship in the long-run, the question is when that ban will be lifted, rather than if.

Turkey remains a NATO nation bordering, Iran, Iraq, Syria, the Mediterranean, the Black Sea, and the Caucasus. Geopolitically, this unfavorable positioning marks a nation at the crossroads of various flashpoints. Besides, the country faces various hybrid risks ranging from Salafi extremist terrorist networks to ethno-separatist terrorism. Thus, the

Turkish military has to ensure a high level of readiness to tackle national security threats across the spectrum. In doing so, inevitably, Ankara faces grim limitations. Turkey, in terms of its economic capacity, is a textbook mid-size state. Furthermore, when it comes to generating defense technologies, the Turkish defense technological & industrial base (DTIB) has long been in the losing camp of the industrial age. Even at the beginning of the 2000s, the contribution of Turkey's indigenous defense industries to the Turkish Armed Forces' warfighting arsenal remained below 20 percent. At the time of writing, this contribution marked an optimistic level of 65 percent. Yet, when it comes to high-end weaponry, be it defensive strategic weapon systems, the fifth-generation aircraft, advanced submarines, airborne early warning & intelligence aircraft, and state-of-the-art C4ISR infrastructure for a generating a world-class network-centric warfare capacity, Turkey still needs foreign suppliers. Germany is one of them in several segments, first and foremost, air-independent propulsion (AIP) submarines.

Arms deals are not immune to political fluctuations. Ankara has to bear the burden of a very long list of disagreements with many of its traditional Western weaponry suppliers. Any country in the world, which sits on the demanding side of arms transactions, wishes to receive less political caveats and more lucrative co-production and technology transfers. Turkey is not an exception in this regard. On the suppliers' side, some nations put more reservations – mostly the European countries – while some others do not ask many questions as to the political considerations and non-military sensibilities, as seen in the case of Russian and Chinese arms browsing around several conflict zones.

Turkey's non-NATO defense partnerships have long served

⁶⁵ Military Balance. (2020). IISS. p.185.

⁶⁶ SETA. (2020). "SETA Security Radar: Turkey's Geopolitical Landscape in 2020". SETA. Retrieved November 13, 2020 from <https://setav.org/en/assets/uploads/2020/01/R151En.pdf>

⁶⁷ Duvar English. (May 5, 2020). "Turkey main recipient of German arms exports in 2019". Retrieved November 13, 2020 from <https://www.duvarenglish.com/diplomacy/2020/05/05/turkey-main-recipient-of-german-arms-exports-in-2019>

the above-mentioned purpose. The Israelis – once upon a time, of course –, the South Koreans, and the Ukrainians put much less political caveats when selling weaponry compared to the Europeans. Besides, they can be more generous when sharing some technologies and sealing co-production ventures, as seen in the Turkish – South Korean, and at present, Turkish – Ukrainian defense ventures.

Russia, however, is not a regular non-NATO defense partner for Turkey. Especially in the aftermath of the illegal annexation of Crimea, the Kremlin's expansionist policies, along with its aggression below the threshold of war, remain at the very epicenter of NATO's threat assessment.

Thanks to the improved technology in unmanned aerial vehicles (UAVs), submarine modernization efforts, coupled with the increased role of the Turkish Navy, Turkey's military vision now extends well beyond its borders. This new strategy rests upon three main pillars; the naval transformation toward a blue-water force; the army's expeditionary warfare concepts with increasing engagement in proxy wars and finally, the expansion of forward military bases in different parts of the Turkish *zone d'influence*⁶⁸. Moreover, Turkey is carrying out broad modernization programs at a rapid pace.

Based on its recent purchases, Turkey is now gaining a competitive edge in armor survivability, proxy war capability and surveillance⁶⁹.

The Blue Homeland concept and the Turkish maritime signature in the Mediterranean is another pillar in its relations with Europe. Turkey's seismic research vessel Oruc Reis' activities in the Eastern Mediterranean marked the start of a new chapter in Turkish strategic affairs. Turkey's latest actions sparked criticism from several EU member states, such as Greece and France. In the EU summit in October 2020, many EU states have advocated for imposing effective sanctions on Turkey. Amidst the crisis, again, Germany's relatively neutral stance was remarkable. Even though Germany said that they recognize the conflict as a serious crisis for the EU, it saw sanctions as the wrong tool⁷⁰. Instead, Germany chose to wait until a tipping point was reached in the escalation to avoid harming its political ties with Turkey. According to Daniela Schwarzer, the director of the German Council on Foreign Relations, imposing deep, broad sanctions on Turkey prematurely would lead to further escalation and that their implementation would be quite complex⁷¹.

⁶⁸ Kasapoglu, C. (May 15, 2020). "Turkey's Growing Military Expeditionary Posture". Jamestown Foundation. Retrieved November 18, 2020 from <https://jamestown.org/program/turkeys-growing-military-expeditionary-posture/>

⁶⁹ Kasapoglu, C. (May 15, 2020). "Turkey's Growing Military Expeditionary Posture". Jamestown Foundation. Retrieved November 18, 2020 from <https://jamestown.org/program/turkeys-growing-military-expeditionary-posture/>

⁷⁰ Yannis, P. (September 19, 2020). "Sanctions against Turkey 'complex in a number of ways', says German Council on Foreign Relations". Ekathimerini. Retrieved November 18, 2020 from <https://www.ekathimerini.com/257079/article/ekathimerini/comment/sanctions-against-turkey-complex-in-a-number-of-ways-says-german-council-on-foreign-relations-director>

⁷¹ Yannis, P. (September 19, 2020). "Sanctions against Turkey 'complex in a number of ways', says German Council on Foreign Relations". Ekathimerini. Retrieved November 18, 2020 from <https://www.ekathimerini.com/257079/article/ekathimerini/comment/sanctions-against-turkey-complex-in-a-number-of-ways-says-german-council-on-foreign-relations-director>

Turkish – German Military Transactions: From History to the Future

The defense partnership between the two countries dates back to the Tanzimat era. After the acceptance of Germany as the first economic partner of the Ottoman Empire in Europe, the cooperation expanded into a close defense agreement. Germans also played an important role in the Ottoman Empire from the time of the Tanzimat reforms by contributing to the Ottoman imperial military's modernization efforts since the middle of the 19th century⁷².

At present, the Turco-German relations are based on many strategic tenets and dimensions, such as trade, Turkey's EU accession and defense. Within the last few decades, Germany has been Turkey's most important trade partner for decades and Turkey and Germany share broad cooperation within NATO. The defense cooperation between the countries intensified in the early 2000s and at present, it has an enormous significance on the Turkish military capabilities. The Turkish Navy stands out as a good example of this partnership and the technology transfer. The "constant respectable cooperation in the Navy field, the amplification of relations for the land forces (through the reference of the German Leopard 1 and 2), high-end, technologically valuable cooperation possibilities" prove mutually beneficial for Turkey and Germany. Ankara has adopted various significant technological know-how from Germany, especially in naval warfare. Within the last ten years, there were several important developments within the Turkish-German security and defense alliance, especially concerning arms trade and joint production deals. Since 2017, the partnership has strengthened with the signing of the Reis submarine cooperation deal and the agreement for the production of the Altay main battle tank, which was to generate significant income for German defense companies.

Just like the economic and political relations, the Turkish - German defense partnership is also based on mutual

gains. Even though Turkey has a growing defense market that is attractive to German traders, it greatly benefits from the partnership. Germany looms large as one of Turkey's major arms providers and the Turkish market offers great opportunities for German defense exports and trade. Alongside this partnership, Turkish domestic capabilities are also improving. Between 2010 and 2020, Turkey has entered a phase of indigenous design and local production made possible by a technology and knowledge transfer. It launched an indigenous helicopter program, an indigenous fighter jet project and a Göktürk-3 satellite. Indigenous contributions in Turkey's defense procurement has increased from 24% to almost 70% between 2002 and 2016. In this year's list, three Turkish defense production giants (Aselsan, TAI and Roketsan) have entered amongst the world's top 100 defense companies. However, for several domestic projects such as the Reis submarines and the Altay tanks, Turkey depends on German supplies for the continuity of its indigenous defense projects. The delayed production of the indigenous Altay tank is a perfect example in this regard, as it shows how Germany's political concerns yield destructive results for Turkey in joint defense projects. Initially, Altay was supposed to be powered by German-made engines and German-made transmission mechanisms. However, the hesitance of Germany led to the halt of the project, leaving Turkey to search for new options or rely solely on indigenous capabilities⁷³.

Even though political problems had significant downturns in some projects like the Altay tank, in 2015, Turkey successfully started the production of its new Reis-class submarines. It is based on the German Type 214, equipped with air-independent propulsion (AIP) and German fuel cell technology. The results of this partnership will take the Turkish naval capabilities an extra mile, due to the submarines' silent navigation and land-attack capabilities.

⁷² Greek City Times. (September 6, 2020). "Germany-Turkey: The timeless geopolitical love is confirmed". Greek City Times. Retrieved November 18, 2020 from <https://greekcitytimes.com/2020/09/06/germany-turkey-the-timeless-geopolitical-love-is-confirmed/>

⁷³ Sevil, E. (January 8, 2020). "Turkey's first indigenous battle tank production delayed". Hurriyet Daily News. Retrieved November 23, 2020 from <https://www.hurriyettailynews.com/turkeys-first-indigenous-battle-tank-production-delayed150706#:~:text=Turkey's%20production%20program%20for,the%20foreign%20company%2C%20he%20said>

Conclusion and Key Findings

After the Gezi protests, the German government adopted a more critical and vigilant stance towards President Erdogan. In recent years, several geopolitical developments, first and foremost the Syrian civil war's spillover have placed additional tensions on an already souring defense relationship. However, the Turkish-German defense partnership have proven to be relatively resilient to political obstacles and downturns. The arms exports ban in question was only kept partial and it excluded maritime equipment. This move protected the sustainability of the Reis-class submarine construction. This year, Germany's arms exports to Turkey resumed at a considerable level.

Turkey's DTIB has reached a critical mass in many ways. The dronization trend looms large as the quantum leap of the nation's defense modernization which has manifested itself in Turkey's cross-border campaigns in Syria.

However, with its current defense economics trends and technological know-how, the Turkish indigenous defense eco-system will remain in need of military-industrial cooperation with foreign actors. The future trajectory of Turkey's fifth-generation airpower will be telling in this respect.

From a defense planning standpoint, Ankara will keep depending on foreign military cooperation for pursuing its national security goals. However, this dependency is getting more 'refined' and moving towards more sophisticated systems and sub-systems. Under these circumstances, arms restrictions and embargoes imposed by Turkey's traditional Western allies could backfire. In other words, these restrictions could be tantamount to offering a critical NATO country's lucrative weapons market to Beijing and Moscow.



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TURKISH – GERMAN STRATEGIC TIES IN CONTEXT: DEFENSE COOPERATION AND POLITICAL-MILITARY AGENDA OF BILATERAL RELATIONS

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