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**In pursuit of independence:
Türkiye's transition from a security consumer to
a security provider**

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IN PURSUIT OF INDEPENDENCE: TÜRKIYE'S TRANSITION FROM A SECURITY CONSUMER TO A SECURITY PROVIDER

Introduction

The late Henry Kissinger highlighted a decade ago in his famous book *World Order* the problem: there is an urgent need to redefine a new world order, but there is no clear set of approved goals or methods. The process we are going through is the crisis of the international rules-based order established after World War II and the pains of transitioning from a unipolar world system to a multipolar one.

As a result of this crisis, emerging middle powers like Türkiye have seen an opportunity to increase their weight and influence¹. The concept of middle power is not new, but the role they occupy in the international system has greatly changed². The crisis of the order and the US tendency, as the hegemonic power, to withdraw and take on fewer responsibilities has led many middle powers to expand their spheres of influence, take on regional roles, and develop compartmentalized relations in various fields by aligning with different poles according to their interests³.

Türkiye, which is among the world's top 20 economies, has simultaneously worked to maintain its position within Western alliances, particularly NATO (NATO, EU, Council of Europe, etc.), while also developing relationships with powers that sometimes oppose or compete with these alliances.

The main factor that enabled middle powers to follow a more active and "independent" policy based on their own interests was the U.S. departing from its position as a hegemonic power aspiring for global leadership across all regions, instead adopting a policy of influence through regional partnerships, reducing the use of hard power instruments and preferring soft power instruments.

The fact that Türkiye faced disappointment in its relations with the West led the country, especially in the last 10 years, to pursue an independent foreign policy. On one hand, Türkiye's EU accession process has been completely put on hold, while the Customs Union agreement with the EU which is Türkiye's largest economic partner, has not been updated for years. On the other hand, the 2016 coup attempt, the U.S. and European countries cooperation with Kurdistan Workers' Party (PKK), in Syria - recognized by the United States and the European Union as a terrorist organization- that Türkiye has been fighting for 40 years, as well as its Syrian offshoot, People's Protection Units International (YPG), and finally anti- Türkiye

¹ Pinar Dost, "The West must learn from Turkey's transformation from the ashes of the Ottoman Empire to a rising middle power", *TURKEYSource*, November 2, 2023. See: <https://www.atlanticcouncil.org/blogs/turkeysource/the-west-must-learn-from-turkeys-transformation-from-the-ashes-of-the-ottoman-empire-to-a-rising-middle-power/>

² Cliff Kupchan, "6 Swing States Will Decide the Future of Geopolitics", *Foreign Policy*, June 6, 2023. See: <https://foreignpolicy.com/2023/06/06/geopolitics-global-south-middle-powers-swing-states-india-brazil-turkey-indonesia-saudi-arabia-south-africa/>

³ Tim Swejjs and Michael J. Mazarr, "Mind the middle powers", *War on the Rocks*, April 4, 2023. See: <https://warontherocks.com/2023/04/mind-the-middle-powers/>

attitudes in Congress, arms embargoes and restrictions against Türkiye deteriorated further the strained relations.

This independent foreign policy has also brought about significant criticism to Türkiye in the international arena. The most criticized aspect was its contradictory partnerships: Türkiye's alliance with the West, especially through NATO, while also maintaining close relations with countries such as Russia, and to a lesser extent with China and Iran, or its efforts to exist within organizations like BRICS, ASEAN, or the Shanghai Cooperation Organization, which offer an alternative economic and political model to the liberal order⁴.

However, these relations were only the most visible aspect of Türkiye's goal of pursuing an independent foreign policy⁵. Another important facet was reducing dependency on foreign countries in every domain. The most prominent approach here was to expand the geography in which Türkiye has influence, through trade, power projection abroad, humanitarian diplomacy, while increasing local production in the energy and defense sectors and diversifying resources⁶.

In fact, from the time the AKP government came to power in 2002 until 2015, Türkiye had developed relations with regions such as Africa, Asia and the Middle East, where traditional Turkish foreign policy had not invested much before, using soft power instruments like trade, culture, and humanitarian aid.

After 2015, the threat posed by the Islamic State of Iraq and Syria (ISIS) and later by PKK/YPG elements in Syria, the conclusion of alliances from which Türkiye was excluded in the Eastern Mediterranean, and the disagreements over the sharing of exclusive economic zones with Greece and Cyprus, led Türkiye to engage in military interventions in Syria and Libya, as well as the establishment of military bases in Qatar due to divisions in the Middle East, marking a shift towards the use of hard power instruments⁷. Added to these, the increasing influence of the civilian authorities on the military under the current government especially through internal reforms following the failed coup attempt in 2016, over the last decade, Türkiye's military footprint has expanded globally⁸.

Meanwhile, significant momentum was given to the national defense industry initiative that had been started in the 1990s. Since the early 2000s, the Defense Industry Directorate (SSM) has aimed to reduce Türkiye's dependence on foreign suppliers by providing R&D funds for the

⁴ Selcan Hacaoğlu, "Why Turkey, a NATO Member, Wants to Join BRICS", *Bloomberg*, October 21, 2024. See: <https://www.bloomberg.com/news/articles/2024-10-21/why-turkey-a-nato-member-wants-to-join-brics>

⁵ Ammon Aran and Mustafa Kutlay, "Turkey's quest for strategic autonomy in an era of multipolarity", IPC Policy Brief, February 2024. See: <https://ipc.sabanciuniv.edu/en/publications?cat=a78b032b-db6b-4981-a34c-a1e4765fdd14>

⁶ Muhittin Ataman, "The 'Century of Türkiye': A New Foreign Policy Vision for Building the Türkiye Axis", *Insight Turkey*, vol.25, no.3, Summer 2023.

⁷ Mustafa Kutlay and Ziya Öniş, Understanding oscillations in Turkish foreign policy: pathways to unusual middle power activism, *Third World Quarterly*, vol.42, no.12, October 2021. See: <https://doi.org/10.1080/01436597.2021.1985449>

⁸ Rich Outzen, "Turkey's global military footprint in 2022", *Defense Journal by Atlantic Council*, December 22, 2022. See: <https://www.atlanticcouncil.org/content-series/ac-turkey-defense-journal/turkeys-global-military-footprint-in-2022/>

development of domestic defense products and to establish a presence in the international arena by producing its own defense products⁹.

Türkiye, a NATO member since 1952, has built its entire defense system based on the North Atlantic security structure. Therefore, since signing the military aid agreement with the United States in 1945, and especially during the Cold War, Türkiye met all its defense needs through the United States. After the late 1960s and the 1974 Cyprus invasion, and in the years that followed, the official and unofficial arms embargoes and sanctions Türkiye faced many times, pushed the country to work towards self-sufficiency in the defense sector¹⁰.

In the last 20 years, with the involvement of the private sector in these state-led initiatives, Türkiye's arms exports increased by 106 percent from the 2014-2018 period to the 2019-2023 period, while its share of arms exports rose from 0.7% to 1.6% during the same period, making it the 11th largest arms exporter in the world¹¹.

Türkiye is represented by three companies in the world's top 100 arms producers list, and their rankings are rapidly rising. Baykar is ranked 69th, and TAI is ranked 78th, with their revenues and growth largely dependent on arms exports, while Aselsan, ranked 54th, primarily responds to local needs¹².

Türkiye is becoming a significant player in global arms markets by increasing its defense industry exports, which in turn strengthens its position in global foreign policy and defense strategy¹³. Consequently, Türkiye's search for independence as a rising middle power has led it to balance its relations between competing powers; its foreign policy activism, coupled with its ambition for self-sufficiency in the defense sector, has resulted in increased military capabilities that have furthered its expanding military footprint and strategic alliances along its borders, advancing Türkiye's transition from a security consumer to a security provider and mediator in regional and international conflicts.

State of transition from security consumer to security provider

After the Ak Party's (AKP) rise to power in 2002, Türkiye shifted its focus toward non-Western countries in the Middle East, the Balkans, Central Asia, South Asia, and Africa. Combining regional and global ambitions for influence and partnership initially through trade and cultural initiatives, Türkiye then added hard power to its toolbox, developing military relations and partnerships as well. Türkiye's influence, especially in former Ottoman territories, was referred to as neo-ottomanism in the West¹⁴.

⁹ Çağlar Kurç, Serhat Güvenç, Arda Mevlütoğlu & Sıtkı Egeli, "Balancing aspiration and reality: autarky in Turkish defence industrial policy", *Defence Studies*, March 5, 2025, p.10.

¹⁰ Sıtkı Egeli, Serhat Güvenç, Çağlar Kurç and Arda Mevlütoğlu, *From Client to Competitor: The Rise of Türkiye's Defence Industry*, IISS Research Paper, May 2024. <https://www.iiss.org/research-paper/2024/05/from-client-to-competitor-the-rise-of-turkiyes-defence-industry/>

¹¹ Pieter D. Wezeman and al., *Trends in International Arms Transfers 2023*, SIPRI FactSheet, March 2024.

¹² *The Sipri Top 100 Arms Producing and Military Services Companies 2023*, SIPRI Fact Sheet, December 2024.

¹³ Jens Bastian, "Turkey: An Emerging Global Arms Exporter", *SWP Comment*, no.6, February 2024. See: <https://www.swp-berlin.org/10.18449/2024C06/>

¹⁴ Meliha Altunışık, "Worldviews and Turkish foreign policy in the Middle East", *New Perspectives on Turkey*, No.43, Spring 2009, p.173.

In fact, Türkiye's role as a bridge between the West and Islamic civilizations, the need for an assertive foreign policy, and close relations with the Middle East were also defended during previous administrations under the center-right leader Prime Minister Özal (1983-1989) and social-democrat Foreign Minister İsmail Cem (1997-2002)¹⁵.

However, the implementation and the development of these ideas happened under the AKP rule. What has changed is the increased capacity and communication of these aspirations.

Today, Türkiye has been expanding its military footprint through military bases and posts in Syria and in the Kurdistan Region of Iraq; bases in Qatar and Somalia, as well as through military deals for jointly training troops and developing military programs with many countries in Africa such as Somalia, Libya, Ethiopia, Niger, and Togo. Türkiye's rising indigenous defense industry has made it the world's eleventh-largest arms exporter globally providing unmanned combat aerial vehicles (UCAV), armored vehicles, helicopters, corvettes, guns, munitions and more.

Countries provide security under different categories¹⁶. They can be security producers, consumers, suppliers, or mediators. These categories are not fixed and unchanging, and they are also permeable. A country can simultaneously belong to several of these categories, and the category to which a country belongs is determined by its capacity, security needs, and its willingness to intervene in the security of other countries.

Security producers are countries that have sufficient resources and do not require help from others but are willing to provide security to other states. Security consumers are countries that are dependent on other nations for protection from external threats. Security suppliers, while having their own security needs, are states that can often mediate diplomatic relations between security producers and consumers. Security mediators are neutral parties that facilitate security agreements between producers and consumers without directly providing security themselves.

The category a state belongs to depends on its economic and political situation. Rich and powerful countries are usually security producers, while developing states may be security consumers or suppliers in certain areas.

In light of these definitions, Türkiye, a G20 country with the second-largest land army in NATO and an important strategic position, is playing a notable role in regional and international security and acting as a security supplier and mediator.

Under defense alliances such as NATO, Türkiye is also a security consumer. Therefore, Türkiye's role in global security can be seen as a mixture of provider, supplier, and mediator, which also reflects the country's strategic geopolitical position.

Türkiye's actions in ensuring security can be examined under five main headings: contributions to the military capacity building of the countries with which it cooperates; military interventions in regional conflicts; arms sales and joint production initiatives; participation in peacekeeping missions and assuming mediator roles in regional conflicts; and finally, humanitarian aid, which can be classified as a contribution to economic security.

¹⁵ *Id.*, p.180.

¹⁶ Silviu Petre and Ella Ciuperca, "Manufacturers and Security Providers: A Conceptual Essay", *Brazilian Journal of Strategy & International Relations*, v.8, n.16, Jul./Dec. 2019, pp.95-96.

Although Türkiye contributes to Europe's energy security and this role may strengthen in the coming period, we will not address its contributions to energy security within the context of this study.

When examining Türkiye as a security provider, we will explain its initiatives in different geographies with examples, considering its expanding sphere of influence.

1) *The Middle East:*

After the current government came to power, one of the regions it sought to expand its influence to was the Middle East. In the context of its strategy to eliminate threats at their source, protect national and regional interests, and contribute to regional security, Türkiye not only engaged in military interventions in the region but also increased its military footprint through the establishment of military bases, military training activities, and arms exports.

The increasing interest in the region is driven by Gulf countries pursuing more independent security strategies and diversifying alliances due to the US's gradual withdrawal, decreased security commitments, and loss of prestige in the region, which has allowed new players like China, India, Russia, and Türkiye to take on a larger role, contributing to the rise of a multipolar security structure¹⁷.

In 2014, Türkiye, aiming to play a larger role in the region's security, signed a defense agreement with Qatar allowing Turkish troops to be deployed to the country. This cooperation and Türkiye's support greatly helped Qatar during the 2017 Gulf crisis and Qatar blockade helping both countries to establish a special relationship¹⁸. During the blockade when Gulf countries demanded Qatar the closure of the Turkish base and the cessation of Turkish-Qatari military cooperation, Türkiye refused to close the base, stating that it served as a security guarantee for the entire Gulf region and that its goal was to maintain stability in the region¹⁹. Consequently, in 2017, Qatar-Türkiye Combined Joint Force Command was established at the Khalid bin al-Walid military camp²⁰, and in 2019 was expanded with aerial and naval components²¹.

In response to the instability in the region caused by Israel's attacks on Gaza, Lebanon, and the increasing attacks on Syria following the October 7 Hamas attacks, both countries agreed to establish a new joint air force squadron in Qatar to strengthen interoperability, mutual security, and contribute to regional security²². Through this new joint initiative, the Qatari air force will be able to receive training from their Turkish counterparts.

¹⁷ Ali Bakir, "Turkey's security role in the Gulf region: exploring the case of a newcomer", *Turkish Studies*, March 2023, p. 13. See://doi.org/10.1080/14683849.2023.2182686

¹⁸ Yunus Paksoy, "Turkish Military in Qatar: Bonds of mutual trust", *Daily Sabah*, June 13, 2018, <https://www.dailysabah.com/feature/2018/06/13/turkish-military-in-qatar-bonds-of-mutual-trust>

¹⁹ Bakir, *op.cit.*, p.5.

²⁰ Metin Gürçan, "Turkey's military base in Qatar to expand with air, naval elements", *Al-Monitor*, August 20, 2019. See: <https://www.al-monitor.com/originals/2019/08/turkey-qatar-military-cooperation-expand-with-air-naval.html>

²¹ Ragıp Soyulu, "Why are Turkey and Qatar deepening military ties?", *Middle East Eye*, September 4, 2024. See : <https://www.linkedin.com/pulse/why-turkey-qatar-deepening-military-ties-middle-east-eye-81lhc>

²² Jon Lake, "Turkey and Qatar form joint squadron", *Aerospace Global News*, August, 29, 2024. See:

Besides Qatar, Türkiye has also developed good relations with many Gulf Cooperation Council (GCC) countries, and except for the period of the Gulf crisis, the country increased its arms exports to Saudi Arabia and the UAE, to the point of making Türkiye the second largest arms exporter to the UAE after the US over the last two years²³.

After the end of the Gulf rift²⁴, Türkiye normalized its relations with GCC countries and Israel and defense agreements including co-production deals²⁵ for Türkiye's TB2 Bayraktar UCAVs were signed with Saudi Arabia and the UAE. These deals are particularly important because the US was reluctant to provide these countries with the necessary offensive systems. The 2019 Iranian attacks on Saudi oil installations and the 2021 attack on the Saudi Royal Palace revealed that deploying ballistic systems, radars, and interceptors against security threats is not enough to ensure Gulf security²⁶.

Similarly, the cooperation between Saudi Arabia and the Turkish UAV manufacturer Baykar²⁷ for the acquisition and production of the Akıncı armed UCAVs will enhance Riyadh's deterrence against Iran and contribute to countering the growing Chinese influence in the Middle East through arms exports. Although Saudi Arabia previously formed joint ventures²⁸ with several Western defense companies, the collaboration with the Turkish firms will not only provide technology transfer but will also strengthen the country's domestic defense capabilities.

Saudi Arabia's efforts to meet its fighter jet needs through the purchase of F-35s from the US have turned into an ongoing saga. More recently, the country has expressed interest in purchasing 100 of Türkiye's next-generation TK KAAN jets²⁹.

Considering that many countries in the Gulf are in a similar situation, and that Saudi Arabia and the UAE account for 9,6 % and 2.7% of global arms imports³⁰, respectively, it can be said that the Türkiye-Gulf defense partnership has great potential to modify arms supply dynamics in the region and contribute to regional security and stability.

<https://aerospaceglobalnews.com/news/turkey-and-qatar-form-joint-squadron/#:~:text=The%20establishment%20of%20the%20Qatari,training%20opportunities%20and%20enhancing%20security>

²³ Pieter D. Wezeman and al., *Trends in International Arms Transfers 2022 and 2023*, SIPRI FactSheet, March 2023 and March 2024.

²⁴ Meliha Benli Altunışık, "The end of the Gulf rift may not signal the end of Turkey-Qatar relations", *TURKEYSource*, April 5, 2021. See: <https://www.atlanticcouncil.org/blogs/turkeysource/the-end-of-the-gulf-rift-may-not-signal-the-end-of-turkey-qatar-relations/>

²⁵ "Saudi drone deal entails technology transfer, joint production-Baykar", *Reuters*, July 18, 2023. <https://www.reuters.com/business/aerospace-defense/saudi-drone-deal-entails-technology-transfer-joint-production-baykar-2023-07-18/>

²⁶ Natasha Turak, "How Saudi Arabia failed to protect itself from drone and missile attacks despite billions spent on defense systems", *CNBC*, September 19, 2019. See: <https://www.cnn.com/2019/09/19/how-saudi-arabia-failed-to-protect-itself-from-drones-missile-attacks.html>

²⁷ Can Kasapoğlu, "3 QUESTIONS — Turkish drone maker's sale to Saudi Arabia", *Anadolu Agency*, August 4, 2023. See: <https://www.aa.com.tr/en/analysis/3-questions-turkish-drone-maker-s-sale-to-saudi-arabia/2961473>

²⁸ <https://euro-sd.com/2023/08/news/33361/baykar-signs-major-deal-with-sami-for-saudi-akinci-ucav-production/>

²⁹ Barın Kayaoğlu, "Turkey-Saudi defense ties see momentum with potential \$6B deal: What to know", *Al-Monitor*, February 16, 2025. See: <https://www.al-monitor.com/originals/2025/02/turkey-saudi-defense-ties-see-momentum-potential-6b-deal-what-know>

³⁰ Pieter D. Wezeman and al., *op.cit.*, March 2024.

Türkiye's strategic position in the Gulf, its alliance with Qatar, and its contributions to ensuring stability in the region made that the security of Qatar and the Gulf region is perceived now as related to its own national security³¹.

Besides the Gulf, Türkiye has a significant military footprint in neighboring countries in Iraq and Syria where it had carried out military operations to combat threats posed by terrorist groups such as PKK/YPG, ISIS, and Iranian proxies. Since the 1990s, Türkiye has conducted numerous military operations, particularly in the northern part of the region, in its fight against the PKK. After the establishment of the Kurdistan Regional Government in 1992, Türkiye developed good relations with this country, made significant contributions to its development, and fostered energy trade.

During the years of intense conflict between the international coalition and ISIS (2013-2017), when various regions of Iraq were occupied by the organization, Turkish soldiers provided training to Kurdish peshmerga forces and to the Iraqi central government's National Guard³².

After its operations in northern Iraq, especially since 2018, Türkiye began opening permanent bases and posts in the region. According to a map published by the Presidential Communications Directorate in 2020, Türkiye has a presence at 37 different military points, primarily concentrated in border areas³³. Some sources suggest that between 5,000 and 10,000 Turkish soldiers are stationed at these military points. In 2022, the Chief of Staff of the Iraqi Army, stated that Türkiye was operating at five military bases in Iraq with over 4,000 soldiers in 2021, and that this number had increased to 100 military points within a year³⁴.

In 2024, Türkiye strengthened its relations with the Iraqi central government to a new level³⁵. On one hand, it ensured that the PKK was added to Iraq's list of banned organizations and increased cooperation with Iraq in its fight against the PKK. On the other hand, Türkiye pledged investment and support to Iraq under the planned-Development Road Project³⁶.

The project aims to enhance regional stability by promoting economic development in the border regions of Iraq and Türkiye, while also creating opportunities for cooperation across various sectors, including energy, trade, tourism, and logistics.³⁷ One dimension of the closer relations is the military cooperation through which Türkiye provided military training and capacity building for Iraqi forces, joint exercises, information sharing, electronic warfare,

³¹ Ali Bakir, "The Emerging Security Role of Turkey and China in the Middle East. Avoiding a Possible Clash in the Future" in *China's Economic and Political Presence in the Middle East and South Asia*, 2020,10.4324/9781003269175-7, p.128.

³² Hümeýra Pamuk, "Turkey trains Kurdish peshmerga forces in fight against Islamic State", *Reuters*, November 22, 2014. See: <https://www.reuters.com/article/world/turkey-trains-kurdish-peshmerga-forces-in-fight-against-islamic-state-idUSKCN0J60B7/>

³³ Karwan Faidhi Dri, "Ankara has built nearly 40 'military points' in Kurdistan Region: Turkish presidency", *Rudaw*, July 6, 2020. See: <https://www.rudaw.net/english/kurdistan/06072020>

³⁴ <https://shafaq.com/en/Kurdistan/Turkish-army-constructs-new-military-base-in-Kurdistan-Region>

³⁵ Levent Kemal and Ragıp Soylu, "Turkey to launch Iraq military campaign to secure road-rail project to Gulf", *The Middle East Eye*, March 13, 2024. See: <https://www.middleeasteye.net/news/turkey-iraq-development-road-project-launch-military-operation>

³⁶ Soner Cagaptay, Selin Uysal and Bilal Wahab, *The Iraq-Turkey Reset*, May 29, 2024. See: <https://www.washingtoninstitute.org/policy-analysis/iraq-turkey-reset>

³⁷ Serhat Süha Çubukcuoğlu, "The Iraq-Turkey Development Road Project", *TRENDS*, March 13, 2024. See: <https://trendsresearch.org/insight/the-iraq-turkey-development-road-project/?srsId=AfmBOop23UjCRn26SCWNAvZ5aEuB1SDM6TInmoU8h5BJR3CZa5WjbXdL>

cybersecurity, and sales of Turkish UCAVs³⁸. This allows the two countries to work more closely together in the face of common threats and contribute to regional security.

As in Iraq, Türkiye's military interventions in Syria since 2015 served global security in the context of the fight against ISIS, while also focusing on protecting Türkiye's security through operations targeting the PKK and its Syrian affiliates, YPG/PYD. These operations resulted in Türkiye creating zones of influence aiming to secure “a safe zone” for preventing threats coming from the Northeast Syria and to secure internally displaced Syrians as well as Syrian refugees in Türkiye. In these areas Turkish military and security forces contributed to centralizing and restructuring several armed opposition groups into a Syrian National Army³⁹.

Türkiye has been fighting the PKK for forty years in its own territory and Iraq, and has launched three military operations in Northeast Syria against Syrian Democratic Forces (SDF)-controlled areas, aiming to create a safe zone on its border free of PKK-affiliated elements. The SDF is dominated by YPG, the Syrian branch of the PKK, which is recognized by the United States and the European Union as a terrorist organization.

As agreed between Türkiye and Russia in the 2020 Idlib ceasefire agreement⁴⁰, Türkiye played a mediating role in the frequent clashes between the Syrian National Army (SNA), responsible for security alongside Turkish military forces in Türkiye's influence areas and which Türkiye supported throughout the war, and Hayat Tahrir al-Sham (HTS), which was attempting to expand its areas of influence. Thus, to maintain the status quo in Idlib⁴¹ until the overthrow of the Assad regime in December 2024, Türkiye intervened in conflicts between the two groups, forcing them to withdraw to their respective areas. Supporting opposition groups since the beginning of the war, Türkiye emerged as the most effective power in the region after the regime's overthrow. In the interest of regional security, instead of using its close relationship with the group to increase just its own influence, Türkiye encouraged all Gulf countries to cooperate with the new Syrian administration⁴². Türkiye also proposed continuing the fight against ISIS within a four-nation coalition of regional countries⁴³ to ensure security in Syria and is engaging in diplomacy in this regard. It aims to strengthen its role as a security provider in the country and the region's future by offering military capacity building and state-building consulting and support to the new administration.

In Libya, Turkish drones changed the course of the war helping the Government of National Unity (GNA) regain its territories, especially during an operation that Haftar's forces launched against the strategically important Watiya Airbase in May 2020⁴⁴. Following this victory,

³⁸ Ömer Tuğrul Çam, “Türkiye ve Rusya Ateşkes Üzerinde Anlaştı”, *Anadolu Agency*, March 5, 2020.

³⁹ Rich Outzen, *op.cit.*

⁴⁰ David A. Wemer, “Idlib ceasefire is holding and could open door to long-term Syria solution, US envoy says”, *New Atlanticist*, April 30, 2020. See: <https://www.atlanticcouncil.org/blogs/new-atlanticist/idlib-ceasefire-is-holding-and-could-open-door-to-long-term-syria-solution-us-envoy-says/>

⁴¹ Orwa Ajjoub, “HTS, Turkey, and the future of Syria's north”, *Middle East Institute*, October 26, 2022. See: <https://www.mei.edu/publications/hts-turkey-and-future-syrias-north>

⁴² Pınar Dost, “Syria's rebuilding is bringing US partners Turkey and Saudi Arabia closer together”, *TURKEYSource*, February 20, 2025, <https://www.atlanticcouncil.org/blogs/turkeysource/syrias-rebuilding-is-bringing-us-partners-turkey-and-saudi-arabia-closer-together/>

⁴³ “Turkey, Iraq, Syria, Jordan aim to jointly tackle Islamic State, Ankara say”, *Reuters*, February 5, 2025. See : <https://www.reuters.com/world/middle-east/turkey-iraq-syria-jordan-aim-jointly-tackle-islamic-state-ankara-says-2025-02-05/>

⁴⁴

Türkiye built its first military airbase in the Southern Mediterranean at the Watiya Airbase⁴⁵. Turkish drones supported the U.N.-backed government in recapturing almost all of western Libya, where Türkiye has deployed troops, military advisors, combat drones, air defense systems, tactical missiles, and electronic warfare systems under the Turkish Armed Forces Libya Mission, which supports Libyan forces in building military capabilities.

While these efforts contribute to Libya's internal security, Türkiye's military presence in Western Libya and its security agreements with the Tripoli government are concerning for Cairo. While Türkiye and Egypt are working to normalize and strengthen their relations, Russia's influence in Libya could complicate the development of closer ties between Türkiye and Egypt⁴⁶.

2) *Black Sea, the Balkans and the South Caucasus*

The Black Sea, the Balkans, and the South Caucasus are important regions for Türkiye due to both their geographical proximity, Russia's efforts to exert influence in the region, and historical and cultural ties.

The Black Sea and European Security

After the Cold War, Türkiye adopted a regional ownership approach, advocated for multilateral cooperation in the Black Sea through the establishment of various alliances among the littoral countries and thus greatly contributed to regional security. In 1992, it founded the Black Sea Economic Cooperation Organization (BSEC), supported the formation of the Black Sea Naval Cooperation Task Group (BlackSeaFor) in 2001, and launched the Black Sea Harmony Initiative in 2004.

The 2008 Russia-Georgia War, the 2014 annexation of Crimea, and the 2022 invasion of Ukraine have all threatened both regional security and the security of the Euro-Atlantic area, due to revisionist actions by Russia and its supporters. Russia's invasion of Ukraine has increased the strategic importance of the Black Sea, making Türkiye—an important Black Sea power and NATO member—even more crucial in the alliance against Russia, much like during the Cold War. Since the 2014 annexation of Crimea, Türkiye has supported NATO's decisions to strengthen deterrence and defense in the region. As part of NATO, Türkiye participated in air policing missions in Romania⁴⁷, opened its forward operating base in Konya to AWACS

⁴⁵ Johnlee Varghese, “Turkey is Building A Massive Military Airbase in Libya, Its First in Southern Mediterranean”, *International Business Times*, May 30, 2020. <https://www.ibtimes.sg/turkey-building-massive-military-airbase-libya-its-first-southern-mediterranean-46000>

⁴⁶ Alia Brahimi, *Turkey and Egypt want better relations. But will Libya doom the rapprochement?*, Atlantic Council Report, January 23, 2025. See: <https://www.atlanticcouncil.org/in-depth-research-reports/report/turkey-and-egypt-want-better-relations-but-will-libya-doom-the-rapprochement/>

⁴⁷ “Türkiye Deploys Fighter Jets to Romania for NATO Air Policing Mission”, Issue 128, *Defence Turkey*, March 2024. See: <https://www.defenceturkey.com/tr/icerik/turkiye-deploys-fighter-jets-to-romania-for-nato-air-policing-mission-5898#:~:text=Turkish%20Air%20Force%20Command%20F,and%20safeguard%20NATO%20airspace%20effectively.>

missions⁴⁸, joined NATO's multinational combat group in Bulgaria⁴⁹, and provided Turkish Air Force's E-7T Airborne Early Warning and Control (AEW&C) aircraft for NATO exercises⁵⁰.

Since Russia's invasion of Ukraine in 2022, Türkiye has pursued a balancing policy between Ukraine and Russia. The Strategic Document⁵¹ adopted at the 2022 Madrid NATO Summit described Russia as the most significant and direct threat to the security of Allies⁵² and the peace and stability of the Euro-Atlantic region, and this statement has been repeated in all subsequent Summit declarations.

Türkiye's signature is on these NATO decisions, which were made with the approval of all member countries without exception. On one hand, Türkiye has continued to develop its close defense/military cooperation with Ukraine, which began in 2011, especially after the annexation of Crimea. On the other hand, Türkiye has a multi-layered cooperation/competition relationship with Russia, its key partner since 2010, particularly in the economic sphere and regarding military presence in Syria.

A week after the Russian invasion of Ukraine, Türkiye activated the Montreux Convention, which it views as the foundation for Black Sea security and stability, closing the Straits to Russian warships⁵³ and shutting its airspace to Russian jets flying to Syria.

By invoking Montreux, Türkiye opposed the requests of NATO countries, such as the United States, to strengthen their military presence in the Black Sea or send warships to assist Ukraine, aiming to avoid provoking Russia and preventing the conflict from spreading across the Black Sea⁵⁴.

Due to its extensive economic relations with Russia, Türkiye has refrained from enforcing Western anti-Russia sanctions. However, since March 2023, it has restricted the sale of products listed by the EU and the US as sanctioned and reduced the transfer of dual-use goods and technologies (for both civilian and military purposes) to Russia⁵⁵.

Following the announcement by the US Department of the Treasury that sanctions would be imposed on the National Payment Card System, operator of the Mir payment system, Turkish

⁴⁸ "Deployment of 5 E-3A AWACS to Forward Operating Base Konya ended", NATO News, October 6, 2023. See: <https://awacs.nato.int/media-center/press-releases/2023-/deployment-of-5-e3a-awacs-to-fob-konya-ended>

⁴⁹ "NATO's military presence in the east of the Alliance", *NATO*, March 6, 2025. See: https://www.nato.int/cps/fr/natohq/topics_136388.htm?selectedLocale=en

⁵⁰ "Turkish E-7T Provides Airborne Command and Control for Exercise Ramstein Alloy", *NATO*, April 14, 2022. See: <https://ac.nato.int/archive/2022/turkish-e7t-provides-airborne-command-and-control-for-exercise-ramstein-alloy->

⁵¹ NATO 2022 Strategic Concept. See: <https://www.nato.int/strategic-concept/>

⁵² "Madrid Summit Declaration", *NATO Press Release*, June 29, 2022. See: https://www.nato.int/cps/en/natohq/official_texts_196951.htm

⁵³ Yevgeniya Gabor, *A Sea of Opportunities. Introduction*, Atlantic Council Report, September 13, 2024. See: <https://www.atlanticcouncil.org/in-depth-research-reports/report/a-sea-of-opportunities-introduction/>

⁵⁴ "Turkey closes airspace to Russian planes flying to Syria: FM", *Al Jazeera*, April 23, 2022. See: <https://www.aljazeera.com/news/2022/4/23/turkey-closes-airspace-to-russian-planes-flying-to-syria-fm>

⁵⁵ "Turkey blocks exports of military-linked goods to Russia after US warning", *Financial Times*, October 22, 2024. See: <https://www.ft.com/content/be8f3264-ac16-4fd9-b1ba-4e5e6fba466b>

private banks, and, by September 2022, three state-owned banks, ceased accepting these cards⁵⁶.

Since Russia's war on Ukraine began, Türkiye has engaged in various mediation efforts. It played a significant role in the Black Sea Grain Initiative, facilitated prisoner exchanges between Russia and the West, including a prisoner swap in 2024⁵⁷. Türkiye has also made efforts to mediate peace talks to end the war between the two sides through talks in Istanbul⁵⁸.

Türkiye defends Ukraine's territorial integrity, including its stance on Crimea. Ukraine is an important partner for Türkiye in limiting Russia's influence in the Black Sea region. Due to Russia's construction of an Anti-Access/Area Denial (A2/AD) system in Crimea, covering much of the Black Sea, Türkiye has not supported proposals to strengthen the navies of non-NATO countries in the Black Sea⁵⁹.

Türkiye continued its close defense relationship with Ukraine, which had started before the Russian invasion. With the agreement⁶⁰ for the purchase and production of TB2 drones with the defense company Baykar before the war, Türkiye made a significant contribution to protecting Kyiv in the early days of the full-scale invasion⁶¹, especially during a time when European countries and the U.S. were still hesitant to provide assistance to Ukraine.

As for other examples of Turkish-Ukrainian military cooperation, the highlights are: Baykar's Akıncı armed UCAV and Kızılelma armed UCAV use of Ukrainian-made Ivchenko-Progress engines and Türkiye's building of two Ada-class anti-submarine corvettes for the Ukrainian Navy. Türkiye is one of the key actors in rebuilding the Ukrainian Navy with MILGEM-class corvettes and drone warfare technology⁶². Rebuilding the Ukrainian Navy goes beyond just a defense transaction; it is more of a counter-balancing strategy against Russian dominance in the Black Sea. Additionally, the use during the war of Cobra II tactical vehicles developed by the

⁵⁶ Begüm Dönmez Ersöz, "Possible Sanction Risk Forces Turkish Banks to Act on Russian Payment System", *VOA News*, <https://www.voanews.com/a/possible-sanction-risk-forces-turkish-banks-to-act-on-russian-payment-system-/6759025.html>

⁵⁷ Burç Eruygur, "Russia says 8 of its citizens return home after Türkiye-led prisoner swap operation", *Anadolu Agency*, August 1, 2024, <https://www.aa.com.tr/en/world/russia-says-8-of-its-citizens-return-home-after-turkiye-led-prisoner-swap-operation/3292765>

⁵⁸ "US and Russian diplomats meet in Istanbul for second round of talks", *Euronews*, February 27, 2025. See: <https://www.euronews.com/my-europe/2025/02/27/us-and-russian-diplomats-meet-in-istanbul-for-second-round-of-talks>

⁵⁹ Rich Outzen, "Part 3. Defense cooperation: Turkey's triangular balancing in the Black Sea region" in *A Sea of Opportunities*, Atlantic Council Report, September 13, 2024. See: <https://www.atlanticcouncil.org/in-depth-research-reports/report/part-3-defense-cooperation-turkeys-triangular-balancing-in-the-black-sea-region/>

⁶⁰ Pavel Polityuk and Tuvan Gumrukcu, "Ukraine hails Turkey drone deal, Erdogan offer to mediate in Russia standoff", *Reuters*, February 3, 2022. See: <https://www.reuters.com/world/europe/erdogan-visits-ukraine-hoping-play-mediator-with-russia-2022-02-03/>

⁶¹ Paul Iddon, "Turkey's Bayraktar TB2 drones have lost their edge in Ukraine, but the company behind them is still making a big bet there", *Business Insider*, November 17, 2023. See: <https://www.businessinsider.com/turkish-firm-behind-bayraktar-tb2-drone-big-investment-in-ukraine-2023-11>

⁶² Can Kasapoğlu, *Turkish Drone Strategy in the Black Sea Region and Beyond*, The Jamestown Foundation, October 12, 2022. See: https://jamestown.org/program/turkish-drone-strategy-in-the-black-sea-region-and-beyond/#_edn50

Turkish company Otokar⁶³ and Ukraine's delivery of engines for the T929 ATAK-II attack helicopters manufactured by the Turkish Aerospace Industries (TAI) are worth mentioning⁶⁴.

In terms of regional security, Türkiye supports not only the territorial integrity of Ukraine but also that of Georgia and Moldova, advocating for NATO and EU membership of these countries. Türkiye is also closely engaged in defense and security cooperation with other NATO countries in the Black Sea, such as Romania and Bulgaria. For instance, in July 2024, Türkiye led the establishment of the Black Sea Mine Countermeasure Task Group (MCM Black Sea) to clear mines in the Black Sea working alongside these two countries⁶⁵.

In addition to initiatives within NATO Türkiye has also taken other steps to enhance Euro-Atlantic security. In order to supply ammunition to Ukraine, the U.S. and a Turkish defense company collaborated with the U.S. Department of Defense to produce 155mm shells to replenish America's ammunition stocks⁶⁶. Türkiye also joined the German-led European Sky Shield Initiative which will create an uninterrupted defense system from the Baltic Sea to the Black Sea; if realized, this initiative will provide participating countries with a platform to jointly procure air defense capabilities, making a significant contribution to European security⁶⁷.

Ukraine's expertise in the defense industry, combined with Türkiye's production experience, offers the potential for a security partnership that could create mutual benefits in terms of Black Sea security, Euro-Atlantic security, and ultimately, the international rules-based order⁶⁸.

Türkiye, which had previously played a role in mediating between Ukraine and Russia, had also hosted the talks that resulted in the 2022 Istanbul Protocol Agreement⁶⁹. After the recent meeting between Russian and U.S. representatives in Riyadh, U.S. Special Envoy to the Middle East Steve Witkoff suggested that the agreement could serve as a framework for Russia-Ukraine talks, with Türkiye being one of the suggested guarantor countries. Türkiye still maintains its desire to be a guarantor⁷⁰.

⁶³ The Ukrainian military received Turkish Cobra II armored vehicles”, Military NYI, May 11, 2023. See : <https://mil.in.ua/en/news/the-ukrainian-military-received-turkish-cobra-ii-armored-vehicles/>

⁶⁴ Pinar Dost, “The Ukraine-Turkey defense partnership with the potential to transform Black Sea and Euro-Atlantic security”, *TURKEYSource*, March 5, 2024. See: <https://www.atlanticcouncil.org/blogs/turkeysource/the-ukraine-turkey-defense-partnership-with-the-potential-to-transform-black-sea-and-euro-atlantic-security/>

⁶⁵ Serdar Dincel and Umit Turk, “Türkiye, Romania, and Bulgaria establish task force to demine Black Sea”, Anadolu Agency, July 1st, 2024. <https://www.aa.com.tr/en/europe/turkiye-romania-and-bulgaria-establish-task-force-to-demine-black-sea/3263294>

⁶⁶ Jeff Flake, <https://www.deseret.com/opinion/2024/2/13/24072311/turkey-us-nato-ally-aircraft-gaza/>

⁶⁷ Barın Kayaoğlu, “Can Turkey help Europe build effective air and missile defense system?”, *Al-Monitor*, June 2, 2024. See: <https://www.al-monitor.com/originals/2024/05/can-turkey-help-europe-build-effective-air-and-missile-defense-system>

⁶⁸ Can Kasapoğlu, “Turkish-Ukrainian defense partnership in a new geopolitical realm”, *Defense Journal by Atlantic Council*, June 22, 2024. See : <https://www.atlanticcouncil.org/content-series/ac-turkey-defense-journal/turkish-ukrainian-defense-partnership-in-a-new-geopolitical-realm/>

⁶⁹ By Anton Troianovski, Adam Entous and Michael Schwartz, “Ukraine-Russia Peace Is as Elusive as Ever. But in 2022 They Were Talking”, *The New York Times*, June 15, 2024. See: <https://www.nytimes.com/interactive/2024/06/15/world/europe/ukraine-russia-ceasefire-deal.html>

⁷⁰ Ragıp Soylu, “Turkey open to act as security guarantor in Ukraine peace agreement”, *Middle East Eye*, February 24, 2025. See: <https://www.middleeasteye.net/news/turkey-open-act-security-guarantor-ukraine-peace-agreement>

In the face of a U.S. President who is not expected to invest in Europe's future as before, European countries are very concerned about Ukraine's future, as well as their own, and the future of NATO. Consequently, they will have to take more steps to increase defense spending and ensure their own security. In the words of EU President Ursula von der Leyen, "the time of illusions is now over. Europe must step up and take charge of its own defense"⁷¹.

In the face of an America that has significantly reduced its commitments to the region, with NATO's second-largest army, increased influence and military presence in the Black Sea, Mediterranean, and the Middle East, with growth of its defense industry, Türkiye is more crucial to Europe than ever and could contribute to European defense architecture⁷², and desires to be part of it.

After Türkiye's 2019 Operation Peace Spring in Syria many European and NATO countries imposed arms embargos on Türkiye. While this was not an institutional EU embargo very negatively affected the defense-industrial relationship between Türkiye and European countries. As a result of Türkiye lifting its veto on Sweden and Finland's NATO membership, many European countries have removed the official and unofficial embargoes⁷³ which has led to improved relations between Türkiye and European countries, as well as between Turkish defense companies and their European counterparts. Notable examples include Germany's approval of the first arms sale to Türkiye in years, amounting to 336 million euros⁷⁴, Baykar's acquisition of Italy's Piaggio Aerospace, and the agreements made between Turkish defense company Baykar and Italian company Leonardo for integrating European electronics into Turkish drones⁷⁵.

There is great potential for developing Turkish-European defense partnership, especially in aerospace and electronics, where Turkish defense companies are particularly promising⁷⁶. Several companies from Italy, Spain, and the UK are looking to collaborate with Türkiye, particularly in markets like Africa, Central Asia, the Middle East, and Southeast Asia, where Türkiye has been successful⁷⁷.

The new "REARM Europe" package⁷⁸ which aims to strengthen EU defense capabilities as well as supporting Ukraine, is likely include investments in European defense industry through

⁷¹ <https://www.europarl.europa.eu/news/en/agenda/briefing/2025-03-10/0/meps-to-debate-support-for-ukraine-and-the-future-of-european-defence>

⁷² Yavuz Türkgenç, "In strengthening its security architecture, Europe shouldn't discount Türkiye's role", *TURKEYSource*, February 21, 2025. See: <https://www.atlanticcouncil.org/blogs/turkeysource/in-strengthening-its-security-architecture-europe-shouldnt-discount-turkiyes-role/>

⁷³ Andrew England and John Paul Rathbone, "The ex-spy-master shaping Turkey's rise", *Financial Times*, March 6, 2025. See: <https://www.ft.com/content/b0d1d1ba-7689-4b65-8a54-613c0d30d4e7>

⁷⁴ Germany approves \$370m arms sale to Türkiye, in first major export deal in years, *MEMO*, October 8 2024. <https://www.middleeastmonitor.com/20241008-germany-approves-370m-arms-sale-to-turkiye-in-first-major-export-deal-in-years/>

⁷⁵ Federico Borsari, "A star is born: Türkiye's growing footprint in European defense", *Anadolu Agency Opinion*, February 3, 2025. <https://www.aa.com.tr/en/opinion/opinion-a-star-is-born-turkiyes-growing-footprint-in-european-defense/3470022>

⁷⁶ Tom Waldyn, <https://www.iiss.org/research-paper/2024/09/turkiyes-defence-industrial-relationships-with-other-european-states/>

⁷⁷ Ibid.

⁷⁸ <https://www.reuters.com/world/europe/eu-defence-plans-could-mobilise-800-billion-euros-von-der-leyen-says-2025-03-04/>

multi-annual contracts and joint procurement projects. The EU Commission proposed a new loan plan⁷⁹ worth 150 billion euros (\$163 billion) for European countries to buy air defense systems, drones and “strategic enablers” from European producers. However, it is still undecided whether non-EU countries such as Türkiye, the United Kingdom, and Norway would be eligible for these funds⁸⁰. To realize the potential of European-Turkish cooperation in ensuring European security, Türkiye needs to be integrated into defense cooperation with the EU. Vetoes within the Union regarding Türkiye’s PESCO membership, as well hesitations about integrating Turkish defense companies into European defense joint procurement projects and new initiatives, need to be avoided⁸¹.

The Balkans

The Balkan countries have historically been crucial to Türkiye’s national security, and after the Cold War ended and Yugoslavia dissolved, Türkiye supported the region’s fragile nations and participated in NATO operations and peacekeeping missions there⁸². In 1999, Turkish troops took part in NATO’s airstrikes, which led to the withdrawal of Yugoslav forces from Kosovo. The ruling Justice and Development Party (AKP) has broadened Türkiye’s influence in the Western Balkans, extending its reach economically, politically, militarily, and even culturally⁸³. Türkiye, one of the earliest nations to acknowledge Kosovo's independence, played a key role in regional mediation efforts, initiating trilateral talks with Bosnia and Herzegovina and Serbia in 2009⁸⁴, and with Bosnia and Herzegovina and Croatia in 2010. The AKP’s foreign policy leaders supported the Euro-Atlantic integration of Western Balkan nations, strengthened economic ties, and promoted Turkish investments in the area. Türkiye has also focused on enhancing security cooperation, contributing to defense capabilities of several countries in the region, including Kosovo and Serbia. Since 1999, the EU's EULEX mission, operating under the UN mission in Kosovo (UNMIK), has worked to uphold the rule of law⁸⁵, with Türkiye consistently contributing to both EULEX and KFOR, while actively supporting the normalization process between Serbia and Kosovo.

⁷⁹ <https://apnews.com/article/eu-defense-spending-us-ukraine-8cbd54ba81c086aa8e47ea3a0971febb>

⁸⁰ Fatih Yurtsever, “Turkey offers defense lifeline as Europe seeks security independence”, *Turkish Minute*, March 11, 2025. See: <https://www.turkishminute.com/2025/03/11/analysis-turkey-offers-defense-lifeline-as-europe-seeks-security-independence/>

⁸¹ Pınar Dost, The Ukraine-Turkey defense partnership with the potential to transform Black Sea and Euro-Atlantic security, *TURKEYSource*, March 5, 2024. See: <https://www.atlanticcouncil.org/blogs/turkeysource/the-ukraine-turkey-defense-partnership-with-the-potential-to-transform-black-sea-and-euro-atlantic-security/>

⁸² Parts of this work related to Turkey’s peacekeeping and mediations efforts related to Balkans were adapted from a previous article of the author. Pınar Dost, “Kosovo’s bumpy road to EU and NATO memberships and relations with Türkiye”, *Women in Foreign Policy Almanac 2023*, April 2024.

⁸³ Fatma Ashl Kelkitli, Turkey and the Western Balkans During the AKP Period, *Avrasya Etüdleri*, vol. 2, No.44, 2013. See: <https://dergipark.org.tr/tr/download/article-file/422099>

⁸⁴ Birgül Demirtaş, “Reconsidering Dilemmas of Turkey’s Foreign Policy: The Case of the Balkans” in Pınar Gözen Ercan, *Turkish Foreign Policy, International Relations, Legality and Global Reach*, Palgrave Macmillan, 2017.

⁸⁵ EULEX Kosovo: European Union Rule of Law Mission in Kosovo - Civilian Mission, November 30, 2020. See: https://www.eeas.europa.eu/eulex-kosovo/eulex-kosovo-european-union-rule-law-mission-kosovo-civilian-mission_und_en?s=333

Following the tensions in northern Kosovo in May 2023, Türkiye deployed additional troops to KFOR at NATO's request⁸⁶ and, for the first time, took command of the peacekeeping mission in October 2023. Since 2021, after the conflicts in the north, Kosovo has been strengthening its security forces to meet NATO standards and ensure its own security. Türkiye has provided consistent support through grants⁸⁷, military training, armored vehicles⁸⁸, and most recently, delivered five Bayraktar TB2 drones⁸⁹ to the Kosovo Security Force (KSF)⁹⁰.

Some experts argue that through its drones' sales and partnerships it is developing with Southeastern European countries, Türkiye's foreign policy has been successful in creating a new geo-strategic alignment by forming alliances with Western-leaning former Soviet Union and former Warsaw Pact countries especially through increased engagement with the GUAM group, formed of Azerbaijan, Ukraine, Georgia, and Moldova⁹¹.

South Caucasus and Central Asia

Türkiye's growing economic and military influence in the South Caucasus and Central Asia is contributing to regional security by balancing not only Russia's but also China's increasing influence.

Through its trilateral partnership with Georgia and Azerbaijan, Türkiye has developed a close defense and security partnership with these countries. The use of Turkish drones was decisive in Baku's victory over Yerevan during the Second Nagorno-Karabakh War. Türkiye's important role and support in the war also increased the country's standing and influence in both the South Caucasus and Central Asia. Türkiye supported Georgia to increase its defense capabilities through training, advising and staff exchanges, and Turkish companies provided armored vehicles⁹² and Turkish infantry and sniper rifles.

Relations with Azerbaijan, which are described as 'one nation, two states, one army,' represent Türkiye's closest relations in the region. Since the end of 1990s, Azerbaijan has become one of Türkiye's major defense industry clients, cooperated on military training held joint military exercises. There is a high level of military integration between the two countries, with close collaboration in drones, ground vehicles, command systems, and logistical support⁹³. The

⁸⁶ "Turkish troops return from Kosovo after completing mission", *Hürriyet Daily News*, September 6, 2023. See: <https://www.hurriyetdailynews.com/turkish-troops-return-from-kosovo-after-completing-mission-186072>

⁸⁷ "Military support to Kosovo from Turkey", *Defense Here*, September 4, 2020. See: <https://defensehere.com/en/military-support-to-kosovo-from-turkey/>

⁸⁸ *KSF provides armored military vehicles from Turkey*, KOHA, July 9, 2021. See: <https://www.koha.net/en/arberi/fsk-ja-i-siguron-14-automjete-ushtarake-te-blinduara-vuran-nga-turqia>

⁸⁹ Eren Beksac, "Kosovo receives new Turkish Bayraktar TB2 drones", Anadolu Agency, July 16, 2023. See: <https://www.aa.com.tr/en/europe/kosovo-receives-new-turkish-bayraktar-tb2-drones/2947178>

⁹⁰ Vuk Vuksanovic and Filip Ejodus, "Wings of Change: Why Armed Drones Are Proliferating in Western Balkans", *Balkan Insight*, July 17, 2023. See: <https://balkaninsight.com/2023/07/17/wings-of-change-why-armed-drones-are-proliferating-in-western-balkans/>

⁹¹ Can Kasapoğlu, "Turkish Drone Strategy in the Black Sea Region and Beyond", *op.cit.*

⁹² <https://www.aa.com.tr/tr/savunma-sanayisi/turk-savunma-sanayisince-uretilen-vuran-zirhli-araclari-gurcistan-ordusuna-teslim-edildi/3247910>

⁹³ Richard Outzen, "Security and Military Cooperation among the Turkic States in the 2020s" in Svante E. Cornell, *Türkiye's Return to Central Asia and the Caucasus Silk Road Paper*, June 2024, pp.15-30.

Shusha Declaration in 2021 formalized mutual defense commitments in an “alliance”⁹⁴, further solidifying Azerbaijan's strategic ties with Türkiye. This collaboration became more concrete during the 2020 and 2022 Azerbaijan-Armenia clashes.

With the establishment of the Organization of Turkic States⁹⁵ (OTS- previously called the Turkic Council) together with Azerbaijan, Kazakhstan, Kyrgyzstan, Türkiye, and Uzbekistan, together with observer countries Türkiye formalized and intensified its relations with Central Asian countries. The organization has important potential to challenge Chinese, Iranian and Russian influence in Central Asia⁹⁶.

In addition to the political, economic, and cultural dimensions of Turkic world integration, security cooperation while still behind the OTS’s extent, is also developing in areas such as joint military exercises, maneuvers, and arms trade. Close relations have gained a new momentum in recent years with Turkish defense industry’s growth and with the opportunity provided by the purchase of Turkish-made UCAVs in Kazakhstan, Kyrgyzstan and Turkmenistan strengthening military ties. Besides Türkiye's military capacity, Russia's increased aggression in the region—first in Georgia and then in Ukraine—its support for Armenia in Nagorno-Karabakh, the U.S. failure in Afghanistan, and the willingness of regional states to become independent of Russian and Chinese influence were decisive factors that helped Türkiye further its relations with Central Asian states⁹⁷.

Military cooperation includes military education, joint military training exercises and law enforcement training programs, intelligence cooperation, support for combatting illegal migration, drug trafficking, and terrorism⁹⁸.

In Kazakhstan, ASELSAN Engineering, was established as a joint venture that produces electro-optical products, remote-controlled weapon systems, night-vision, and anti-drone devices⁹⁹. In 2022, a defense agreement was concluded with Kazakhstan opening the way for the production of ANKA attack drones under a license agreement with Türkiye’s TUSAŞ and Kazakhstan Engineering¹⁰⁰.

In Kazakhstan and Kyrgyzstan cooperation with Türkiye helped these countries to reduce Russian influence: to lessen reliance on Russia to deal with its domestic unrest and deal with threats emanating from Russian- and Iran-backed Tajikistan respectively¹⁰¹.

⁹⁴ Ruslan Rehimov, “Landmark Shusha Declaration between Türkiye, Azerbaijan turns year-old”, *Anadolu Agency*, June 15, 2022. See: <https://www.aa.com.tr/en/world/landmark-shusha-declaration-between-turkiye-azerbaijan-turns-year-old/2614301>

⁹⁵ Hungary, Turkmenistan and Northern Cyprus are observer members. Mehmet Sah Yılmaz, “Turkic Council’s name changed to Organization of Turkic States”, *Anadolu Agency*, November 11, 2023. See: <https://www.aa.com.tr/en/world/turkic-council-s-name-changed-to-organization-of-turkic-states/2419633>

⁹⁶ Nurettin Akçay, “Does the Organization of Turkic States Worry China and Russia?”, *The Diplomat*, November 23, 2022. See: <https://thediplomat.com/2022/11/does-the-organization-of-turkic-states-worry-china-and-russia/>

⁹⁷ Richard Outzen, *op.cit.*

⁹⁸ Göktuğ Sönmez, Gökhan Batu, “Defence sector and military cooperation between Turkey and the Central Asian Republics: limitations and prospects amidst intensified regional and global rivalry”, *Defense & Security Analysis*, September 30, 2024. See: <https://doi.org/10.1080/14751798.2024.2404334>

⁹⁹ Göktuğ Sönmez, Gökhan Batu, *op.cit.*

¹⁰⁰ Almaz Kumenov, “Kazakhstan seals deal to produce Turkish drones under license”, *Eurasia net*, May 13, 2022. See: <https://eurasianet.org/kazakhstan-seals-deal-to-produce-turkish-drones-under-license>

¹⁰¹ Richard Outzen, *op.cit.*

Türkiye's developing relations with OTS countries contribute to the internal order of these regions, while also serving as a balancing factor against the influence of Iran, Russia, and China which, as the main suppliers of arms, increase the dependence of regional countries and cause instability in the region. Thus, it positions Türkiye as an emerging competing security provider in the region.

3) Africa

After the Middle East, the current government has made the most investments to increase its influence in Africa. The path opened by the "Action Plan for Opening to Africa"¹⁰² prepared in 1998 further developed relations. In 2005, Türkiye declared the year as the 'African Year' and gained observer status in the African Union, where it was recognized as a strategic partner in 2008¹⁰³. In the past 20 years, Türkiye's diplomatic missions in Africa have increased from 12 to 44 across the 55 countries on the continent. The trade volume with 54 African countries increased from \$5.4 billion to \$37 billion in 2023¹⁰⁴. Meanwhile, Turkish Airlines expanding its destinations to 62 points across 42 countries, has long maintained its position as the airline flying to the most destinations in Africa¹⁰⁵. Initially, Türkiye contributed to regional economic security through soft power tools including infrastructure investment, trade, humanitarian aid, and educational activities. Later, by adding military dimensions and a mediation role, Türkiye strengthened its position as a security provider on the continent.

Over the past 15 years, Türkiye has developed its military relations with African countries. Türkiye has opened military bases and signed security cooperation agreements with dozens of countries in areas such as military capacity building, counter-terrorism, arms trade, and military training for security forces, including the army, gendarmerie, coast guard, and police. Through these efforts, Türkiye has strengthened its long-term strategic role as a security provider in the region¹⁰⁶. Many African countries are eager to benefit from Türkiye's expertise in combating insurgencies, security sector reforms, and advancements in the defense industry¹⁰⁷.

Somalia is one of the most important countries where Türkiye has strategic cooperation in Africa. Türkiye opened its largest overseas base in Mogadishu in 2017, where Somali army

¹⁰² Mehmet Öztürk and Melih Duman, A Founding Role in Türkiye's Africa Policy: The Action Plan for Opening to Africa, *Insight Turkey*, Vol.25. No.3., Summer 2023, pp.223-240

¹⁰³ *Turkey-Africa: Solidarity and Partnership*, Turkish Ministry of Foreign Affairs website. See : https://www.mfa.gov.tr/turkey_africa_solidarity-and-partnership.en.mfa#:~:text=Since%202005%2C%20the%20year%20of,trade%20and%20investment%20in%20Africa.

¹⁰⁴ Gokhan Ergocun, "Türkiye eyes \$50B trade goal with Africa as Lesotho's premier pays visit", *Anadolu Agency*, November 19, 2024. <https://www.aa.com.tr/en/africa/turkiye-eyes-50b-trade-goal-with-africa-as-lesothos-premier-pays-visit/3398049#:~:text=The%20trade%20volume%20between%20T%C3%BCrkiye,in%20the%20Turkish%20capital%20Ankara.>

¹⁰⁵ Musa Alioğlu, "THY, Afrika'da 42 ülkede 62 noktaya uçuş yapıyor!", *Eko Haber*, April 25, 2024. See: <https://www.ekohaber.com.tr/thy-afrikada-42-ulkede-62-noktaya-ucus-yapiyor>

¹⁰⁶ Sine Özkardeşahin, Turkey's approach to Africa can shed light on NATO's future engagement on the continent, *TURKEYSOURCE*, December 20, 2023. See: <https://www.atlanticcouncil.org/blogs/turkeysource/turkeys-approach-to-africa-can-shed-light-on-natos-future-engagement-on-the-continent/>

¹⁰⁷ Nebahat Tanrıverdi Yaşar, "Unpacking Turkey's Security Footprint in Africa", *SWP Comment*, No:42, June 2022. See: <https://www.swp-berlin.org/10.18449/2022C42/>

receives training and learns Turkish at the Camp TURKSOM defense university established at the base¹⁰⁸. With an agreement signed in 2023, the Turkish navy will protect Somali waters for ten years and establish and train Somalia's naval forces¹⁰⁹.

A key component of Türkiye's defense influence in Africa is the arms trade conducted by Turkish defense companies in the region. This has been made possible by the growing capabilities of Turkish defense companies, which offer competitive prices for their military equipment, including unmanned aerial vehicles (UAVs), armored vehicles, electro-optical sensor systems, surveillance systems, mine clearance vehicles, and rifles, all under a no-strings-attached policy¹¹⁰. Additionally, the defense diversification policies of African countries have contributed to this growth.

Türkiye has signed defense agreements with countries such as Somalia, Ethiopia, Libya, Kenya, Rwanda, Nigeria, and Chad; Bayraktar UCAVs are contributing to the fight against terrorism in countries like Chad, Togo, Burkina Faso, Mali, Niger, Morocco, and Tunisia, while Turkish armored vehicles are supporting counterterrorism efforts in Kenya, Chad, and Somalia.

Türkiye has played a mediation role in conflicts across the continent. Since 2013, it has acted as a mediator in resolving the disputes between Somalia and Somaliland¹¹¹; the conflicts between Ethiopia and Somalia were also concluded with Türkiye's mediation through the Ankara Declaration, which gained significant attention in the international media¹¹². Türkiye's efforts as a peace broker to end the Sudanese civil war has provoked comments in the media, introducing the country as "Africa's mediator"¹¹³.

As a result, while in the past, Türkiye only established diplomatic, economic, and cultural relations in Africa, it is now rising as a security provider on the continent. Türkiye's historical ties and contemporary collaborations with Africa offer a strong alternative to Western states. The Turkish defense industry, particularly with domestically produced Bayraktar UAVs, contributes to counterterrorism efforts in the region, while military bases, arms exports, and military training increase its long-term strategic influence¹¹⁴.

However, Türkiye's growing influence also leads to a power struggle in Africa. The competition among major actors in the region requires Türkiye to establish a careful and precise balance in its security, energy, and economic collaborations¹¹⁵. Türkiye's increasing arms trade in the region has heightened competition with leading security providers such as China and France in

¹⁰⁸ Sine Özkardeşahin, *op.cit.*

¹⁰⁹ Mehmet Çelik, "New Phase of Türkiye-Africa Ties: From Development Aid to Strategic Security Cooperation", *UİK Panorama*, August 2, 2024. https://www.uikpanorama.com/blog/author/mehmet_celik/

¹¹⁰ Nebahat Tanrıverdi Yaşar, *op.cit.*

¹¹¹ Turkish Ministry of Foreign Affairs website. See: <https://www.mfa.gov.tr/disisleri-bakani-davutoglu-somali-ve-somaliland-arasindaki-kardesligin-pekismesi-konusunda-atilmasi-gereken-adimlari-atacagiz.tr.mfa>

¹¹² Kalkidan Yibeltal and Basillioh Rukanga, "Ethiopia and Somalia agree to end bitter Somaliland port feud", *BBC*, December 12, 2024. See: <https://www.bbc.com/news/articles/cvgr7vlevvgo>

¹¹³ Nosmot Gbadamosi, "How Turkey Became Africa's Mediator", *Foreign Policy*, January 25, 2025. See: <https://foreignpolicy.com/2025/01/15/turkey-africa-mediator-sudan-ethiopia-somalia/>

¹¹⁴ Nebahat Tanrıverdi Yaşar, *op.cit.*

¹¹⁵ Murat Özgür Güvendik, Türkiye'nin arabuluculuğuyla Somali ile Etiyopya'nın imzaladığı Ankara Bildirisi dünya basınında geniş yer buldu, *AA Gündem*, 12.12.2024. See: <http://aa.com.tr/tr/gundem/turkiyenin-arabuluculuğuyla-somali-ile-etiyopyanın-imzaladigi-ankara-bildirisi-dunya-basininda-genis-yer-buldu/3422894#>

some countries. Türkiye's neutral stance in political turmoil, such as in Niger¹¹⁶, demonstrates its commitment to building long-term relationships and ensuring stability in Africa.

4) *South and Southeast Asia*

In addition to Africa, another region that Türkiye has turned its attention and influence toward since 2019, through the Ministry of Foreign Affairs' *Asia Anew Initiative*, is the Asia-Pacific region, where it aimed to develop its economic, diplomatic, and security relations. Türkiye's middle power strategic autonomy policy, along with its policy of balancing, also applies to its approach to great power competition, leading the country to follow a balancing strategy between China and the US¹¹⁷. Rather than pursuing a China-focused policy, Türkiye has adopted a multilateral and multi-layered approach in the region, developing its relations in trade, humanitarian aid, and defense.

Türkiye has also engaged in mediation and peacekeeping/peacebuilding processes in this region, aiming to contribute to the resolution processes in conflicts such as the Kashmir issue, the Uyghur problem, and the Rohingya crisis¹¹⁸.

Besides China, Türkiye aimed at strengthening its economic and defense relations especially with Japan, Malaysia and Indonesia.

In South and Southeast Asia, Türkiye, by engaging in arms trade with Pakistan, Thailand, Singapore, Indonesia, Malaysia, and the Philippines, has become one of the countries offering an alternative to China in the search for resource diversification and helping these countries reduce their economic dependence on China by offering the price-performance advantage of its defense industry products¹¹⁹. In this region, Malaysia stands out due to its support for Türkiye's ASEAN Dialogue Partnership, as it was the first Southeast Asian country to sign a free trade agreement with Türkiye in 2014, and is the largest recipient of Turkish arms¹²⁰. Malaysia also stands out because Turkish defense companies established subsidiaries there: ASELSAN MALAYSIA in 2017, and Turkish Aerospace Industries (TAI) established TAI Malaysia in 2021.

Through the signing of several memoranda of understanding between the defense and technology companies of the two countries in 2019, the arms trade grew. However, Türkiye was unable to overcome its negative trade balance with Malaysia, which occupied 68.4% of the total exports, amounting to 489.9 million dollars¹²¹. Remote-controlled stabilized gun systems

¹¹⁶ Sine Özkraşahin, *op.cit.*

¹¹⁷ Nuh Yılmaz, *Asia Anew Revisited*, Insight Turkey, Vol. 26, No.1, 2024 Winter, p.19.

¹¹⁸ Ferhat Durmaz, "Asia Anew Initiative in Turkish foreign policy and relations with Malaysia", Koç University Center for Asian Studies Blog, November 6, 2023. See: <https://kuasia.ku.edu.tr/asia-anew-initiative-in-turkish-foreign-policy-and-relations-with-malaysia/>

¹¹⁹ Nuh Yılmaz, *ibid.*

¹²⁰ Ferhat Durmaz, *ibid.*

¹²¹ Malaysia Country Factsheet, Turkish Exporters Assembly (TIM) Economic Research, May 2024. See: https://tim.org.tr/files/downloads/Ulke_Bilgi_Notlar%C4%B1/Malezya%20%C3%9CIke%20Bilgi%20Notu.pdf

for the Malaysian Coast Guard, ANKA UCAVs and HÜRJET light attack aircraft, highlight of the increasing arms exports¹²².

In Indonesia, Turkish defense companies initiated a joint venture in 2014 to produce medium-class tanks, and delivered Kaplan MT tanks in March 2022. Türkiye also supplied various defense systems to Indonesia, including naval combat systems, jammer for submarines, and remote-controlled weapon systems.

The Philippines became the second country to use ATAK helicopters, purchasing six for approximately 280 million dollars.

Conclusion

As the global order shifts from a unipolar structure to a multipolar one, emerging middle powers like Türkiye have started to pursue more independent foreign policies, enhancing their influence regionally and globally while balancing their relationships with major powers. At the same time, Türkiye's defense industry has reduced its dependence on foreign suppliers, increasing its self-sufficiency in defense products, which has made the country a rapidly growing global arms exporter. This transformation, combined with Türkiye's expanding military presence in the Middle East, Africa, and other regions, along with the growth of its strategic alliances, has positioned Türkiye as a security provider and mediator in regional and international conflicts.

Türkiye's growing influence in these vast regions has occasionally led to conflicts of interest both in Washington and with many European countries, as well as with anti-Western players like Russia, Iran, and China. This has shifted security balances and at times created conflicts. Today, as we discuss the future of the global system and Europe's security in the second Trump era, Türkiye's cooperation with the US in regions where America no longer shows interest against actors like Iran, Russia, and China, and Europe's strengthening of security cooperation with Türkiye in a Europe where the U.S. is withdrawing, will contribute to global security. It will also encourage Türkiye to consider its allies' expectations and interests more, making its security policies more aligned with the West.

This research shows that Türkiye's global military influence is not solely based on arms exports. However, in recent years, increasing arms exports globally strengthened Türkiye's strategic power. These exports enabled the country to develop closer military relations with these countries, resulting in defense agreements that extend to areas like military training, establishment of bases, and joint military exercises. Experts argue that the ambition for self-sufficiency and independence of the defense industry can prevent sustaining this growth, as it would be limited by the country's financial capacity, necessitating constant increases in defense spending¹²³. They emphasize the importance of preventing uncontrolled growth caused by duplication of capabilities and suggest that instead of focusing on achieving a certain level of manufacturing capacity in the defense industry, Türkiye should liberalize its defense markets, accept investments from multinational companies, and invest in niche areas where it has a

¹²² Diren Dogan, *Asia Anew Initiative of Turkey and Impacts on Defense Industry*, SETA Analysis, May 2022, No.79.

¹²³ Çağlar Kurç et al., *op.cit.*

comparative advantage¹²⁴. Recently, agreements between the Turkish defense company Baykar and the Italian firms Piaggio and Leonardo can be seen as an example of the shift in Türkiye's defense industry strategy.

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¹²⁴ *Ibid.*