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Çağlar Kurç

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# No Strings Attached: Understanding Turkey's Arms Exports to Africa

Çağlar Kurç 

Department of Political Science and International Relations, Abdullah Gül University, Kayseri, Turkey

## ABSTRACT

Turkey's defence industries have shown significant development in recent years. But the limited domestic market and the financial crisis created sustainability problems for the industry. To increase its arms sales, Turkey began to search for potential markets to expand, and Africa emerged as an excellent market to enter. Turkey had already invested in Africa through its multi-track diplomacy, a necessary condition for arms sales. While the multi-track diplomacy and increased engagement helped Turkey's arms exports, they are insufficient to explain the recent rise of Turkish arms exports, which have been showing an upward trend since 2021. This paper argues that the increase in arms exports is the function of multi-track diplomacy, no-strings-attached arms export policy and the demonstration effect.

## KEYWORDS

defence industry; arms export; military diplomacy, Africa

## Introduction

Turkey has been exporting weapons since 1995, but battlefield successes of Turkish weapons, especially the uncrewed aerial vehicles (UAV), in Syria, Libya, Azerbaijan, and Ukraine are now facilitating a rapid rise in Turkish arms exports. Increases in arms exports, especially after 2020, are making Turkey a rising supplier within the international arms market. While the armoured vehicles have been the forte of Turkish defence industries, Turkey is now selling a variety of indigenous weapon systems, ranging from air defence to electronic warfare systems, armoured vehicles to military ships, and trainer jets to various types of UAV and capturing the slice from the global arms market.<sup>1</sup>

Turkey is on the path to becoming the next proliferator of weapons in the international system, thus having the potential to alter regional balances. Turkey's arms exports, especially UAVs, provide a significant military capability boost to nations with limited financial resources. Turkey's customers will be more likely to increase in the highly competitive African market, which could result in other emerging arms producers emulating Turkey's defence industrialization and arms trade policies. This would increase the spread of weapons in the system. Therefore, it is essential to understand why Turkey's arms exports in Africa are growing, especially after 2020, and the future implications for Turkish foreign and arms trade policies.

For a group of observers, the increase in Turkey's arms exports to Africa is to be celebrated. It is a testament to Turkey's increased defence industrial capabilities, the strength of foreign policy in Africa and successes in its fight against terrorism. They point out that Turkey's 'win-win' approach to African countries makes Turkey an attractive partner in economic relations and security cooperation. As Turkey's relations deepen in the continent, the impact of Turkish defence industries, hence the arms exports, increase in parallel. They contend that Africa is an important market for Turkish defence companies, and new policies towards Africa could increase the exports in this market and make arms exports sustainable.<sup>2</sup> The increased defence industrial capabilities and the quality of weapon systems drive Turkish arms exports. However, this would not be a sufficient explanation, especially if we want to understand why Turkish arms exports gained momentum after 2020. Furthermore, such an approach overlooks the possible negative impact of Turkish arms sales on Turkey's foreign policy in the region.

The negative impact of increased arms exports is what others are concerned about. Turkey rarely evaluates possible fallout while selling arms. Turkey already experienced such problems when it sold armed UAVs to Ethiopia, which drew criticism from Egypt. Thus, these observers argue that Turkey's increased arms exports to Africa could damage Turkey's foreign policy in the region.<sup>3</sup> Mürsel Bayram warns that if Turkey does not approach arms exports with caution, without thinking about how a sale of arms to one country could strain the relations with another country, the arms exports and defence industrial relations could neutralize soft power acquired through development cooperation.<sup>4</sup> But, calling for caution on arms exports overlooks the main drivers of Turkish arms exports and why Turkey would be unwilling to have caution in its arms exports.

This paper argues that the rapid expansion of the Turkish defence industry necessitates increased arms exports because of the limitation on the Turkish domestic market. Turkey offers weapons with no strings attached to make its defence industries sustainable, meaning it would not use its arms exports as political leverage on recipient countries or put restrictions on how and where to use them, given the highly competitive nature of the African arms market. Turkey also seeks to gain an edge in pursuing multi-track diplomacy to support its arms export policy, incorporating various non-state actors to supplement state-based diplomacy. While these tools are helping Turkish arms exports, they are not sufficient to explain the timing of the rise. The paper also argues that the demonstration effect, the perceived successes of Turkish weapons, had an impact on rising arms exports. Therefore, a mix of no strings attached policy, multi-track diplomacy, and the demonstration effect shape Turkey's arms exports to Africa.

This paper is divided into four sections. The first section discusses the motivations behind defence industrialization in emerging countries, the problems they face and how arms exports and defence diplomacy are seen to deal with the limitations of emerging defence industries. The section also discusses the recipient's concerns and motivations in the arms trade. The second section focuses on the recent developments in Turkey's defence industrialization and presents the problems that drive Turkey's arms export behaviour. The third section briefly overviews Turkey's multi-track diplomacy in Africa. The fourth and final section investigates Turkey's arms exports to Africa and explains the increased arms exports.

## Defence industrialisation and arms exports in Emerging Countries

Emerging countries generally have three main motivations for defence industrialization: the desire for power, wealth, and prestige. First, in the pursuit of increased power, emerging states perceive national defence industries as a tool for achieving a guaranteed and independent supply of arms,<sup>5</sup> which would increase the state's autonomy due to decreasing the influence of supplier states. Second, emerging countries seek economic benefits from defence industrialization, believing that local defence industries would decrease the economic burden<sup>6</sup> and help economic development and growth.<sup>7</sup> Third, the desire for prestige, both in international and domestic politics, could also be an essential motive for defence industrialization mainly because it will show the country's technological prowess to the international community and supplant the grandiose ideas within the domestic audience.<sup>8</sup> Thus, defence industrialization is also a symbolic key to attaining international stature and domestic power. While these motivations inform defence industrialization, reaching the desired goals is challenging.

Emerging countries suffer from several structural problems. The first problem is that emerging countries have limited financial resources for research and development than major multinational corporations in the global arms market. Given the increasing cost of producing weapons, major multinational corporations are better positioned to shoulder the burden of new weapon development due to their market reach. With the help of their financial power, these companies would lead the technological development while the emerging countries, except for a few areas, play catch up.

Second, emerging countries have a limited market size due to limited financial resources. While the countries are motivated to protect their emerging defence industries, the limited market size pressures the sustainment of the production capabilities. The problem compounds when investments in defence industrialization result in overcapacity. To overcome the financial and market limitations, emerging states turn to arms exports and seek to reach larger markets to sustain their production capabilities and finance research and development costs.

Maintaining production capacity is vital for supplying the needs of the domestic customer. Given the structural problems, arms exports emerge as the only survival route for many defence companies.<sup>9</sup> Arms exports would enable defence companies to go beyond the national market to spread the cost of research, development, and production over a larger number of units, thus decreasing unit costs.<sup>10</sup> Success in arms exports would help companies keep the production line open and, in some cases, expand. While arms exports help defence companies keep their manufacturing capabilities, it was seen as a source of foreign currency income for governments. As the governments encourage defence companies to export, defence companies would develop and produce weapons for the international market.<sup>11</sup> But the economic benefits of arms exports might not be as high as the governments expect or argue.

While the arms exports could make the defence company sustainable and create opportunities to expand its capabilities, the overall effect on the nation's economy and foreign currency income might be minimal. Between 2009 and 2019, the mean value of arms exports of the five largest arms exporters, the United States, Russia, France, China and Germany, were 161.6 billion USD, 11.0 billion USD, 5.4 billion USD, 3.6 billion USD and 3.3 billion USD, respectively. The mean values of the share of arms export as

a percentage of all exports for these countries are 6.7% (US), 2.1% (RUS), 0.6% (FRA), 0.1% (CHN) and 0.2% (GER). For emerging countries, the shares of arms exports in all exports are also relatively small, i.e., Israel (1.7%), Brazil (0.1%) and Turkey (0.3%).<sup>12</sup> Thus, the overall economic benefits of the arms trade are limited in general. Still, the arms trade is beneficial for ensuring the survival of the domestic arms industry through safeguarding jobs, realizing economies of scale, and reducing procurement costs.<sup>13</sup>

As the export levels increase in line with the production capabilities, states use arms exports to further their power and security. The maintenance of production capabilities and expansion allows governments to have a defence industry beyond the domestic market permits. This would enable states to pursue defence industrialization even further, while decreased unit costs would help arm the militaries at a lower price, thus easing the burden of modernization. Furthermore, arms exports allow the supplier country to increase the military capabilities of allied states, which also helps the supplier country minimize and avoid direct military presence.<sup>14</sup> Supplier states could use arms exports to influence the policies of the recipient states<sup>15</sup> and increase the ability of supplier states to engage in remote warfare to protect their interests. However, political influence depends on the dependency level that supplier states can have over the recipient states. Thus, the recipient states seek to decrease their dependency.

Conventional arms exports are not limited to the transfer of weapons/equipment. Procuring one weapon system also entails several long-term commitments, ranging from 'setting up training and maintenance facilities, supply of ammunition and spares, availability of updates/modifications and transfer of technology'.<sup>16</sup> Thus, recipient states judge the credibility of suppliers before establishing a long-term relationship.<sup>17</sup> The recipient states are concerned with the security of supply, whether the supplier would continue delivering weapons during a possible future conflict or impose an embargo to alter the recipient's foreign policy. Recipient states might seek to break the dependency or alleviate its effects by pursuing defence industrialization. Yet, even without defence industrialization, states could still alleviate the limitations on acquired weapons. To circumvent the restrictions, states could choose to buy from multiple suppliers and/or seek to buy from suppliers that do not restrict the use of weapons. Thus, the states will seek to diversify their suppliers and build new military and defence relationships.<sup>18</sup> Especially after the Cold War, the diversification of the suppliers became easier as the number of suppliers in the system increased due to the globalization of arms production.<sup>19</sup> Although acquiring weapon systems from diverse suppliers could increase the logistical strain on the militaries, states could still prefer logistical strain over limitations on using their weapons.

States also seek value for money. States seek to gain an advantage over their rivals by increasing their military capability. Increasing the military capability could be done through training and emulating the best practices and acquiring new weapon systems. However, acquiring new weapon systems depends on the ability to pay, so the price of weapons matters.<sup>20</sup> When seeking value for money, states try to balance the cost, operational effectiveness, and adoption capacity of their military organization.<sup>21</sup> But value for money is not an exact science and is rife with uncertainties, especially in determining the effectiveness of a weapon system.

The battlefield effectiveness of any weapons system is fraught with uncertainties on how a new weapon system performs under the stress of war and how the

adversaries would respond. Uncertainties about the performance of a weapons system make states with limited financial resources more cautious. As Sarah E. Krebs points out, 'What armies want to do is use technology that's battle-tested, so they're not the ones trying to debug along the way',<sup>22</sup> Buying an untested weapon system or buying one that the supplier is not using increases the uncertainties and end up costing more for the recipient state, both in economic and military terms.

Using weapon systems in wars solves this problem by demonstrating not only the capabilities of a weapon system but also under which conditions or operational concepts they are effective. Although a weapon's capabilities and/or the doctrines for its use can be known before the war, states might reveal full capacity during the war when the international community is paying more attention.<sup>23</sup> The war then becomes a major demonstration point, which reduces the uncertainty by providing information about the system's performance in the war, specifying its employment,<sup>24</sup> changes in tactics,<sup>25</sup> and presenting the outcome in different environments.<sup>26</sup> This demonstration effect decreases the uncertainties on the weapon system, catches the international community's attention and convinces prospective buyers while propelling the user to the spotlight of the international arms market. Yet, the convincing of prospective buyers cannot be only understood with the demonstration effect. Defence diplomacy could also play an integral part in shifting the preferences of potential buyers.

Defence diplomacy has been changing since the end of the Cold War. As Cottey and Forster define, defence diplomacy 'involves the peacetime cooperative use of armed forces and related infrastructure (primarily defence ministries) as a tool of foreign and security policy'.<sup>27</sup> While the realpolitik concerns remain in contemporary defence diplomacy, it goes beyond countering enemies. Modern defence diplomacy involves (1) building cooperative relationships with former or potential enemies, (2) promoting security sector reform, and (3) developing the capacity to contribute to peacekeeping and peace-enforcement capabilities.<sup>28</sup> In addition, defence diplomacy seeks to create an environment of trust and convergence of interests through military channels.<sup>29</sup> Thus, the role of military attaché and their duties expand as the definition of security changes and becomes more comprehensive.<sup>30</sup> Yet, defence diplomacy is not limited to the soldiers. Defence experts and companies are also involved in the process. Defence diplomacy could also act as a basis for arms exports due to the facilitation of exchanges and shared values, which could be used to construct an awareness among soldiers of belonging to the same community.<sup>31</sup> Even before the arms transfers happen, the contact between the soldiers, defence experts, and company officials could influence the choice of weapons and the conditions of the transfer of arms and technologies<sup>32</sup> since social networks<sup>33</sup> can shape economic, political and organizational interests determine the selection.<sup>34</sup>

Arms transfers will strengthen the interpersonal relations between the supplier and recipient states through increasing cooperation while supporting the partner states in developing military capacity. Arms transfers would enable building and maintaining closer military-to-military ties.<sup>35</sup> As the mutual trust between the soldiers is established, the states could seek to benefit from the established relations, either by increasing arms exports and/or seeking cooperation in other defence-related fields.<sup>36</sup> Therefore, even if the supplier state could not influence the recipient states' foreign policies, using arms exports as a part of defence diplomacy will bring other benefits to supplier states.

## Turkish defence industrialization and the need for arms exports

Turkish defence industrialization has been experiencing fast-paced growth. By 2018, *Savunma Sanayi Başkanlığı* (SSB—Presidency of Defence Industries) manages 667 projects, a tenfold increase from 66 projects in 2002.<sup>37</sup> These projects involve a wide range of defence products, from UAVs to corvettes, attack helicopters, and EW systems. This variety of products shows how far Turkish defence production capabilities came from its humble beginnings in the late 1970s. In parallel with the increased number of projects, the industrial capabilities of the industry also grew. On the road towards self-sufficiency, the industry's growth was necessary for prime contractors and subcontractors, who were the core of the defence production ecosystem. While this growth was slow during the 1980s and 1990s, the Adalet ve Kalkınma Partisi (AKP—Justice and Development Party) years saw a rapid expansion, especially after 2013. Thus, in parallel with the development of the industry, the defence budget is also increasing. According to SIPRI military expenditure data, Turkey's military expenditure increased from USD 9.050 billion in 2002 to USD 20.447 billion in 2019.<sup>38</sup> According to the Turkish government, Turkish defence industries can now meet 75% of the needs of the *Türk Silahlı Kuvvetleri* (TSK—Turkish Armed Forces). These could not have been achieved without significant growth in the industry.

In parallel with the growth in the industry, Turkey's exports have also been increasing. According to *Savunma ve Havacılık İmalatçılar Derneği* (SASAD—Defence and Aerospace Industry Manufacturers Association) data, Turkey's exports have increased from 1.262 billion USD in 2012 to 2.741 billion USD in 2019. While a significant portion of the export is the result of offset agreements; out of USD 2.741 billion, Europe's share is USD 705 million, while the United States' share is USD 821 million; SASAD argues that a 100% increase in non-offset markets (Middle East, Asia, Africa and Latin America) is a testament to improvements in Turkish defence companies' attempts to enter in foreign markets. Yet, the increasing trend in exports after 2015 failed to continue in 2020, in which Turkish defence exports decreased by 17%, remaining at 2.279 billion USD. According to SASAD, changes in the countries' priorities during the pandemic, such as a decrease in allocated resources to defence, were the main reason for the decrease in arms exports.<sup>39</sup> The arms exports began to rise in 2021, reaching 3.225 billion USD.<sup>40</sup> Any increase in arms sales is good news for Turkish defence companies because their domestic market suffers from financial limitations.

Financial limitations, especially when Turkey experiences a severe economic downturn, significantly impact defence industrialization and the sector's sustainability. The political will ensure the necessary funds are available to the defence companies, thus allowing the continuation of the projects, even when the economy suffers. However, this also has its limits. For example, in 2018, Turkey experienced a currency and debt crisis, which resulted in the Turkish lira losing 40% of its value against the US dollar and a 9.2% decrease in per capita income in US dollars. This had significant implications for the defence industry.<sup>41</sup> To prevent further depreciation of the Turkish lira, the Turkish government took precautions, which involved using the Turkish lira in the new defence contracts and converting the existing contracts from foreign currencies to the Turkish lira. This involved payment in Turkish lira for the imported goods, which the defence industry depends on for production. This has put the sector in a tight position as the

precautions shifted the burden from the government budget to the defence companies. The industry argued that these new precautions could result in inflated unit prices or losses for the companies while increasing the risk to the sector's sustainability. Thus, the industry asked for changes in the defence contracting procedures while requiring 'discipline' for the newcomers to sector.<sup>42</sup> The COVID-19 pandemic made the situation worse. Turkey wanted to both protect its economy and continue military spending. The outcome was another currency crisis. Due to the economic strain created by Covid-19, the Turkish lira lost 30% of its value during 2020.<sup>43</sup> The impact of the latest currency crisis, coupled with Covid-19, and the effects of the 2018 crisis on the defence companies was dire.

A SASAD report reveals the impact of the currency crisis, which has been worsened by Covid-19. According to the report, the defence companies, although they continued their deliveries, expect a nearly 30% income loss. Coupled with foreign policy problems, which are already reflected negatively on the export performance of the companies, the sector is concerned about sustainability. Especially the subcontractors are complaining about late payments and expressing the heavy debt burden resulting from their previous engineering and infrastructure investments. The report mentions there is a lack of payments from Tier 1 contractors, whom the primary contractor pays, to Tier 2 contractors because Tier 1 contractors have been spending the money on the repayment of their debts. The fear is that certain companies could go out of business.<sup>44</sup> If the concerns expressed in the report become true, then the Turkish defence industry would suffer a substantial loss of production capabilities and a weakening of the defence production ecosystem. Yet, the Turkish government is committed to supporting defence industrialization. This commitment also reflected Turkey's 2021 defence and security budget. The 2021 budget has a 14% increase from the 2020 budget in Turkish lira terms. However, when we account for the depreciation of the Turkish lira, the budget has shrunk in US dollar terms to around USD 19.1 billion.<sup>45</sup> The US dollar spending is necessary since Turkey still depends on foreign inputs despite significant improvements in its defence production capabilities.

While Turkey becomes a good integrator and system designer, it would still need foreign inputs, especially intermediate products. This situation can be observed in the continuous importance of foreign inputs in Turkish defence production. According to SASAD Performance Reports, Turkey's imports have risen since 2016, with a sharp increase in 2018 (USD 2.449 billion) and 2019 (USD 3.088 billion).<sup>46</sup> The imports decreased in 2020 (USD 2.161 billion) and remained at similar levels in 2021 (USD 2.062 billion).<sup>47</sup> The dependence on foreign inputs poses a danger for Turkish defence companies, especially during the economic crisis, because it would increase the costs and pose a risk to the industry's sustainability. The problem of sustainability worsens when the growth of the industry becomes uncontrolled, resulting in replicating existing capabilities and overcapacity.

The growth of Turkish defence industries has become uncontrolled despite the attempts to control and manage the sector's expansion in 2009.<sup>48</sup> For example, in the 2009–2016 Defence Industry Sector Strategy Document, the land systems sector strategy foresaw the creation of a sustainable land system sector. SSB would take necessary precautions to prevent replicating existing capabilities and focus on improving existing infrastructure and capabilities.<sup>49</sup> The follow-up 2018–2022 Defence Industry Sector

Strategy Document argues for the limited number of main contractors. According to the document, BMC, FNSS, and Otokar are the main contractors for tactical wheeled and tracked integrated platforms. At the same time, BMC, Katmerciler, Nurol Makina and Otokar are the main contractors for armoured internal security vehicles.<sup>50</sup> However, rather than limiting the number of contractors for each sub-sector in the land systems, we observe that all the companies are producing similar types of vehicles. Currently, there are six different companies (FNSS, BMC, Otokar, Nurol Makina, Katmerciler, and Tümosan) that offer similar products. For example, all of these companies produce tactical wheeled armoured vehicles (FNSS Pars 4 × 4, BMC Amazon 4 × 4, and Vuran, Otokar Cobra I and Cobra II, Nurol Yörük and Ejder Yalçın, Katmerciler Hızır 4 × 4 and Tümosan Pusat).

Interestingly, except for Pusat, Turkey procured these different tactical wheeled armoured vehicles. Similar trends can also be observed in other areas, such as shipbuilding and UAV production. While the growth in the Turkish defence industries, at the outset, is desirable and in line with the increasing production capabilities, the uncontrolled expansion of the industry creates further strain on already limited financial capabilities as the government seeks to support all these different companies offering similar products. Because of these problems increasing arms export remains vital for the sustainability of Turkish defence industries. The recent interest in Turkish UAVs (especially Bayraktar TB2) and entrance into the African market raise the hopes for catching an upward trend in arms exports and alleviating some of the problems.

### Turkey's multi-track diplomacy in Africa

Turkey's interest in Africa began in 1998, but the level of interest and the intensity of relations increased during the AKP rule. The turn to Africa started in 1998 when then Minister of Foreign Affairs İsmail Cem proposed Africa Action Plan.<sup>51</sup> Yet, Turkey failed to implement the Africa strategy due to economic and political crises.<sup>52</sup> Under the AKP rule, the turn to Africa began to take hold in Turkish foreign policy. In 2003, Turkey adopted the 'Strategy for the Development of Economic Relations with African Countries'. It became a strategic partner of the African Union<sup>53</sup> and joined the African Development Bank in 2008.<sup>54</sup> Turkey's involvement deepened in the continent following its active involvement in the Somali crisis in 2011.<sup>55</sup> In 2014, Turkey launched a new strategy with the motto 'African issues require African solutions' under the Turkey-Africa Partnership initiative, which sought to strengthen sustainable development and integration.<sup>56</sup> As the interest and involvement in Africa increased, Turkey adopted a multitude of tools, engaged in multiple issues, and leveraged multiple actors to strengthen its position in the region.

Turkey utilizes multi-track diplomacy with a multi-stakeholder approach. Turkey's multi-track diplomacy involves incorporating the Turkish public and private stakeholders, such as religious groups, NGOs, community groups and other citizen-based entities, into Turkey's efforts in the region. These non-state actors engage in close cooperation with their African counterparts.<sup>57</sup> Through official and non-state actors, Turkey uses various instruments, such as political cooperation, economic incentives, military and security activities, humanitarian aid<sup>58</sup> and scholarships, to open and strengthen its relations. Consequently, Turkey increased its diplomatic missions in

Africa from 12 in 2009 to 48 in 2022<sup>59</sup> and increased the frequency of high-level visits. In addition to diplomatic missions, state agencies (such as the Turkish Cooperation and Coordination Agency (TIKA), the Presidency for Turks Abroad and Related Communities (YTB), and the Presidency of Religious Affairs (Diyanet)), Government Organized non-Governmental Organizations (such as the Foreign Economic Relations Board of Turkey (DEIK), the Turkish Exporters Assembly (TIM), Yunus Emre Institute and Turkish Maarif Foundation), Non-Governmental Organizations (such as the Turkish Red Crescent (KIZILAY), and the Humanitarian Relief Foundation (IHH)), and Turkish Airlines are active actors in supporting and implementing Turkish policies in the region. However, Turkey is not only engaged in humanitarian and economic relations on the continent. There is also a defence diplomacy side to Turkey's multi-track diplomacy.

In defence diplomacy, Turkey follows in the footsteps of the Western governments. Since the late 1990s, Western governments, particularly the US, the UK and France, used military diplomacy to increase the effectiveness of African militaries, especially the peacekeeping capabilities, by providing both training and equipment.<sup>60</sup> As a part of the multi-track diplomacy, Turkey also seeks to increase the effectiveness of African security forces. To this end, Turkey signed military, security and defence agreements with more than 25 African countries, including training police officers and soldiers under the International Police Training Cooperation Project.<sup>61</sup> Furthermore, Turkey announced its USD 5 million support for the G5 Sahel force and signed a defence deal with G5 Sahel.<sup>62</sup> Finally, Turkey opened a military base in Somalia to train and equip Somali soldiers, non-commissioned officers, and officers.<sup>63</sup> These show that Turkey has a comprehensive approach to Africa that feeds into its status in the continent.

While the multi-track diplomacy enabled Turkey to open and strengthen its relations in the continent,<sup>64</sup> the 'no stick'/no strings attached' policy made Turkey attractive. Unlike other donors, such as China which require support for One China Policy,<sup>65</sup> Turkey does not have political conditionalities in its approach to Africa. During the AKP period, political linkages such as international alignments and co-ethnicity have lost their significance in determining aid,<sup>66</sup> which shaped the no political conditionalities policy in Turkey's approach to recipient countries.<sup>67</sup> For example, even if the transfer of Gülen-linked schools was an important issue for Turkey, the development aid was not tied to whether the countries transferred these schools to Turkey or not. In some cases, where countries transferred these schools to Turkey, development aid volumes have decreased, and in other cases, where countries did not transfer, development aid has not been affected by this.<sup>68</sup> The Ankara Consensus is argued to present 'an alternative approach to African sustainability problems'<sup>69</sup> and an interest in regional development<sup>70</sup> rather than attempting to shape the continent. This 'no strings attached' policy is not limited to development aid but can also be observed in arms exports.

### Turkey's arms transfers to Africa

Africa is considered a buyer's market.<sup>71</sup> As the suppliers in the global arms market increased and the ideological positions lost their meaning in the post-Cold War, buyers had more options. This allows a buyer country always to find a more willing supplier. The increased competition could lower the cost of procuring weapon systems.<sup>72</sup> This is the

case in Africa. Most African countries, if not all, have weapon systems from major suppliers (Russia, China and the United States) and emerging powers (Brazil, Turkey, Serbia). But, for a new supplier, entrance into the buyer's market could be challenging.

Intense competition is the defining feature of the buyer's market. A prospective entrant had to face the major suppliers and competition from emerging defence industries, which share similar motivations with the prospective new entrant. Between 2009 to 2019, the United States was the leading supplier, supplying 33% (mean) of all arms sales to Africa. The United States was followed by Russia (30%), European Union (23%) and China (8%). The rest of the suppliers only provided 5%.<sup>73</sup> While in North Africa, this overall trend continues, in Sub-Saharan Africa, the European Union (20%), China (19%) and the rest (16%) sold more and equal amounts of weapons as Russia (16%).<sup>74</sup> Thus, breaking into a new market might be challenging but not impossible. Prospective entrants might offer weapons systems that could be cheaper, high quality, good enough systems (not highly complex), which serve the buyer needs better and without conditionalities. Turkish weapons and its arms sales policies certainly meet these criteria. While Turkey is still not a major supplier in Africa, it is certainly making an impact.

Most of Turkey's arms transfers to Africa are armoured vehicles, Armoured Personnel Carriers (APCs) and Armoured Patrol Vehicles (APVs) from various Turkish companies. However, Turkish UAVs are getting more attention. The armoured vehicle market is more competitive because of the high number of producers available than armed UAVs. Furthermore, Turkish companies are competing with companies from other countries and among themselves. Because the rapid expansion in this defence industry sector forces nearly all companies to increase their exports. The intense competition among Turkish companies could be seen in the variety of armoured vehicles that Turkey sells, which includes:

- Otokar Cobra APV (I & II combined) to Burkina Faso, Ghana, Mauritania, Nigeria, Rwanda and an unknown African state,
- Otokar Arma APC to an unknown African state,
- Nurol Ejder Yalçın APC to Chad, Senegal, and Tunisia,
- Katmerciler Hızır APC to Kenya and Uganda,
- BMC Vuran APC to Tunisia,
- BMC Kirpi APC (I & II combined) to Libya GNC (possibly aid), Somalia (aid) and Tunisia.<sup>75</sup>

As seen from the above list, apart from FNSS and Tümosan, the prominent Turkish companies sold arms to various African companies. However, armoured vehicles are not the only export items. Turkey sold MRTP-20 Patrol Craft to Egypt, OPV-76 Offshore Patrol Vessel to Nigeria, Hürkuş-B trainer aircraft to Niger and T-122/300 Self-Propelled Multiple Rocket Launcher to Libya GNC. Turkey also sold Bayraktar TB-2 UAV to Ethiopia, Libya GNC and Morocco, and TAI ANKA to Tunisia.<sup>76</sup> In July 2022, Nigeria signed an agreement with TAI to procure T-129 attack helicopters.<sup>77</sup> Based on SIPRI data, Turkey's arms transfers to Africa between 2021 and 2022 amount to a total of 96 million USD (trend indicator value), while Israel and Brazil sold 18 million USD and 53 million USD, respectively.<sup>78</sup> Of these three countries, Turkey was the only supplier that sold armed UAVs to a variety of customers in Africa.<sup>79</sup> Although the list focused on

the major weapon systems, it is safe to assume that all these systems would include systems and components from other Turkish companies. While Turkey has been exporting arms to Africa since 2007, the orders have started to rise since 2021. There are three main reasons for Turkey's rising arms exports in Africa.

First, Turkey satisfies the main concerns of African countries, security of supply and value for money. Turkey sells high-quality weapon systems that are comparatively cheap without any conditionalities. Although it is difficult to judge the quality of weapon systems as an outsider, Turkish weapons are built following NATO standards, laying out performance and quality standards and resulting from NATO members' operational experience and cooperation.<sup>80</sup> This is a good yardstick to predict Turkish weapons' quality. Moreover, the Turkish military uses nearly all exported weapon systems except Arma armoured vehicles, meaning that recipient states do not have to deal with debugging the weapons. Consequently, significant operational know-how acquired since the 1980s shapes Turkish weapons' design, development, and operational concepts.<sup>81</sup>

This makes Turkish weapons systems, especially UAVs, more attractive for countries experiencing similar security threats as Turkey<sup>82</sup> as opposed to largely untested Chinese weapons systems.<sup>83</sup> Furthermore, Turkish weapons are at the optimum place of cost-effectiveness in terms of price. For example, Bayraktar TB2 costs around USD 5 million but performs beyond expectations. While it might not be the most complex high-technology weapon system in the market, TB2s are good enough to meet users' needs. For example, TB2s provide a significant advantage to Niger in its fight against Boko Haram. The non-state actor possesses little to no air defence capabilities, making TB2 ideal for destroying small vehicles or closely grouped soldiers.<sup>84</sup> Similarly, Ethiopia produced TB2s to use in its fight against Tigrayan militias though the environment and the distances in the Sahel region limit its use.<sup>85</sup> Yet, Turkish UAVs, especially TB2s, present a capacity increase for many African states that lack modern expensive combat aircraft capability.

Turkey does not use weapons sales as political leverage and is committed to this policy. In a recent statement, the President of SSB, İsmail Demir reiterated Turkey's commitment to no strings attached policy in arms sales by saying, 'We are open to the use of the products that we design, develop and produce by our friends to protect their interests and to ensure their internal security. We do not intend to introduce meaningless restrictions as many other countries do'.<sup>86</sup> On the other hand, Chinese systems might be cheap but usually come with hidden costs, especially political ones.<sup>87</sup> Only in the case of Egypt did Turkey stop deliveries of MRTP-20 patrol craft after the 2013 coup.<sup>88</sup> These make Turkey an attractive supplier but do not solely explain Turkey's increasing arms export levels. Turkey's multi-track diplomacy is another factor in the rising Turkish arms exports to Africa.

Second, multi-track diplomacy certainly impacts the increased arms sales in Africa in some cases through establishing social networks that could shape procurement decisions. Although not all countries with increased relations with Turkey bought weapons from Turkish companies, the countries with older and established diplomatic relations with Turkey have recently started to purchase weapons. For example, Turkey's official ties with Nigeria date back to 1962, when Turkey opened an embassy. The first arms sale to Nigeria happened in 2007, a year after,<sup>89</sup> then-Prime Minister Recep Tayyip Erdoğan visited Nigeria, where he declared Nigeria

a 'strategic partner'.<sup>90</sup> Similarly, Chad bought Turkish weapons following President Erdoğan's visit in 2017, which was argued to take the relations between the two countries to new heights.<sup>91</sup>

There is also one outlier: Rwanda. In the case of Rwanda, arms sales are the initial step to increasing the relations between the two countries. Turkey sold Cobra APVs to Rwanda in 2011,<sup>92</sup> yet the relations intensified after 2014 when Turkey opened its embassy.<sup>93</sup> Rwanda ordered additional Cobra APVs following Foreign Minister Mevlüt Çavuşoğlu's visit in 2016.<sup>94</sup> Therefore, based on the arms sales and overall foreign policy behaviour, some recipient countries decided to buy weapons from Turkey after it increased its regional involvement. However, not all countries chose to buy from Turkey despite increased relations before 2021. This means multi-track diplomacy has some positive impact on arms sales, though not a definitive one, as Turkey establishes itself as a reliable actor in Africa. Because multi-track diplomacy only partially explains arms sales, we need to look at the third factor, the demonstration effect.

Third, Turkish UAVs, especially Bayraktar TB2, showed that mid-tech UAVs could be effective against non-state actors and in modern conventional wars following the Turkish operations in Libya and Syria, Second Nagorno-Karabakh War and War in Ukraine. The surprising effectiveness of Turkish Bayraktar TB2 against Russian air defence systems, and even naval systems in Ukraine, proved the efficacy of mid-tech UAVs on the battlefields.<sup>95</sup> The use of Turkish UAVs showed how countries could deploy UAVs in battle and altered the air power approach. As Michael Kofman contends, cheap UAVs offer very affordable access to tactical aviation and precision-guided weapons, enabling them to destroy much costlier equipment such as tanks and air defence systems. This allows countries with limited financial resources to have the utility of air power at a fraction of the cost.<sup>96</sup> Since these systems are cheap, losing them on the battlefield is less significant than losing expensive UAVs or fighter aircraft. Rather than spending significant amounts of money on expensive multi-role aircraft, the emerging trend, especially after the Second Nagorno-Karabakh War, is acquiring mid-tech UAVs. Thus, many states noted this and began procuring Turkish UAVs. This explains the timing of orders and reports of interest for Turkish UAVs. Many African orders, such as Togo, Niger, Ethiopia, and Morocco, came after the Second Nagorno-Karabakh War of 2020.<sup>97</sup> Furthermore, Rwanda,<sup>98</sup> Angola,<sup>99</sup> and Nigeria<sup>100</sup> are argued to be interested in buying Bayraktar TB2s. Consequently, there was increased sales and interest in Turkish UAVs after successfully demonstrating their efficacy. This could have an impact on Turkish arms sales overall.

The UAV sales could facilitate the sale of other types of weapon systems. The effect could be direct or indirect. In terms of direct effect, customers would also buy supporting equipment and munitions for the UAVs. For example, Bayraktar TB2 could use the Aselsan CATS imaging and targeting system. It also uses Roketsan-made munitions, such as MAM-L smart micro munition. In indirect terms, UAV sales would increase relations between Turkey and the recipient country, facilitating defence diplomacy. For example, Turkish personnel would train the recipient country's military, as in the case of Ethiopia.<sup>101</sup> This would help build and maintain a closer defence industrial, and military ties, which could be translated into increased arms exports in other weapons systems. According to Mustafa Orakçı, sales director for Elektroland Defence, Turkish companies are already benefitting from the 'great advertisement' of Bayraktar (though not in Africa

but in other regions).<sup>102</sup> Thus, it is safe to expect an increase in Turkish arms sales in other sectors as the sales of Turkish UAVs increase in Africa.

While increasing arms sales is a welcome development for Turkish defence companies and the government, there is a looming risk for Turkey's Africa policy at large. Turkey is already part of the competition for influence in region,<sup>103</sup> and its choices are already straining some of its relations. For example, Turkey's UAV sales to Ethiopia worsened already strained relations with Egypt and involved the United States, which expressed concern over Turkish UAV sales but has not taken any action against Turkey.<sup>104</sup> On the other hand, Turkey tried to manage this problem by dismissing the criticism that Turkish arms sales destabilize the region, pointing out that Turkey urges negotiations and argues that it 'attaches humanitarian provisions to the Ethiopia deal and requires signed undertakings outlining how drones will be used'.<sup>105</sup> At the same time, though, Turkish officials also argue that 'Turkey will continue to follow the policies it set in the area' and that Turkey had no intentions of meddling in any country's domestic affairs.<sup>106</sup> The statements show that Turkey would continue its unyielding stance and prioritize a no-strings-attached arms sale policy with increased military and defence industrial relations. Because Turkey sees Africa as the springboard to realize its pursuit of gaining global power status and becoming a strong regional power,<sup>107</sup> which follows independent foreign policy and needs to increase its arms exports to sustain its defence industries. Such determination to follow this policy could further increase the militarization of Turkish foreign policy,<sup>108</sup> weakening Turkey's soft power in the region in the future. Furthermore, as Turkey becomes the proliferator of armed UAVs, its arms trade policy will be increasingly scrutinized, as in the case of Ethiopia. Turkey could be forced to change its arms trade policy in future depending on international pressures.

## Conclusion

The rapid expansion of the Turkish defence industry and the increased capabilities facilitate but also necessitate increased Turkish arms exports. Turkey is now producing various indigenous weapon systems and is willing to sell them to any customer. The need to make the industry sustainable, which cannot depend only on the domestic market, is one of the driving forces behind the rush for arms sales. Especially the recent financial crises made arms exports more of a priority for Turkish defence companies. Therefore, Africa emerges as a potentially lucrative market for Turkey.

African market, though very competitive, provides an opportunity for any new entrants because countries are more willing to shift to alternative suppliers if they meet the needs and demands of the customers. Turkey is well-positioned to meet the demands because it provides high-quality weapons systems at a lower price. Furthermore, Turkey does not limit the use of weapons or deny any potential customers due to its need to export. Turkey's activities in the African market are also supported by its multi-track diplomacy, which helps Turkey position itself as a reliable and a no strings attached partner. Military diplomacy is used to its fullest, thus increasing its position in the continent. Arms exports seem to benefit from Turkey's increased investment in some cases. It is difficult to argue that multi-track diplomacy is the only reason for increased arms exports. Based on the data, Turkey's arms sales are also enjoying a demonstration effect regarding the

battlefield successes of its UAV. With a mix of competitive quality and pricing, no-strings-attached policy, multi-track diplomacy and increased prestige of Turkish weapons, Turkey could increase its arms exports in Africa. While the extent of the increase is difficult to guess, Turkey is unlikely to change its current policy on arms exports unless there is mounting international pressure and it experiences a fallout in its Africa foreign policy. Until then, it will continue to push for as many exports as possible.

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No potential conflict of interest was reported by the author(s).

## ORCID

Çağlar Kurç  <http://orcid.org/0000-0001-6191-1834>