



Turkey's Foreign Policy Blunders Deprive It of Critical Arms Systems

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EXECUTIVE SUMMARY: Recep Tayyip Erdoğan's flagrant deviations from western democratic norms and badly calculated, neo-Ottoman zigzagging between NATO and non-NATO state actors have left Turkey deprived of critical air defenses, fighter jets, tanks, and other systems at a time when Ankara is giving signals that it wants to play hardball with a rising number of regional and other adversaries.

The Turkish government first learned to use multibillion-dollar arms programs as leverage in its foreign policy calculus in the 1990s: we buy French (or German) to boost our EU accession process; we buy Israeli to enhance our strategic partnership; we buy US to maintain American political support, and so on. Nearly three decades later, Turkey is no longer an off-the-shelf buyer of arms, but foreign policy deliberations still play a major role in defense procurement (and vice versa). Now, however, major foreign policy miscalculations appear to have deprived the Turkish military of critical weapons systems.

It is true that President Recep Tayyip Erdoğan's ambitious campaign to design, develop, and build indigenous arms systems has been successful in boosting the local defense industry, particularly in the production of sensationally successful drone systems, naval platforms, armored vehicles, and smart ammunition—all of which were direct acquisitions from foreign buyers in the 1990s and early 2000s.

Turkey can now boast that it has developed locally built helicopter gunships, trainer aircraft, and a landing platform dock, all containing various levels of foreign technology transfer and licensing. Locally produced systems meet 70% of the military's requirements, compared to 35% in 2002. In the same

period, the number of defense procurement programs rose from 66 to over 700, or from \$5.5 billion to \$70 billion in contract value. Similarly, defense and aerospace industry turnover went from less than \$1 billion to over \$9 billion, and exports rose from \$248 million to \$2.7 billion. In 2019 there were five Turkish arms manufacturers on the global list of the top 100.

These figures undeniably represent a success story—but against that impressive backdrop, Turkey's procurement system appears to have fallen victim to major foreign policy miscalculations, particularly in the past five years. The problems all concern technologies in which Turkey's domestic capabilities have failed to achieve the desired end product.

Air defense

Turkish military planners first recognized the country's "immediate need for long-range air and anti-missile defense systems" in the early 1990s, which led to a military program with an "urgent/top priority" tag. In 2013 Erdoğan shocked his NATO allies when his government announced that it had selected CPMIEC, a Chinese contender, for the construction of a sophisticated air defense architecture. Under western pressure, contract negotiations with CPMIEC failed in 2015, and Ankara invited fresh bids from US (Patriot), European (SAMP/T), and Russia (S-400) suppliers. Ankara again shocked its western allies by selecting the Russian S-400 system, which it initially claimed it could integrate into the (mostly) US and NATO radar assets on Turkish soil. (Turkish officials later had to admit the S-400 could only be deployed as a standalone system.)

The \$2.5 billion S-400 program would be the beginning of a broad, prosperous, and longer-term military procurement partnership between Ankara and Moscow. In 2019, despite warnings from NATO and the US, Turkey took delivery of the Russian S-400 system. Erdoğan said his government would negotiate a second batch of S-400s, and an acquisition of the more advanced S-500 system is now being discussed.

NATO member states are hoping Ankara will leave the S-400 system in hangars and never make it operational, but the Turkish government insists the system will become operational in April. If this does occur, Turkey will be using a long-range air defense system nearly three decades after it decided to procure it "urgently."

A next-generation fighter jet

In the mid-2000s Erdoğan's over-ambitious defense procurement bureaucracy began to toy with the idea of designing and building a "100% Turkish fighter

jet” to end Turkey’s dependency on western (specifically US) suppliers. Funds were allocated and the TF-X program took off with great fanfare. The first indigenous Turkish fighter jet was to be in the air in 2023, the centenary of the Turkish Republic. As Tusaş Turkish Aerospace Industries (TAI) went deeper into the TF-X program, it became clear that a 100% Turkish aircraft in the air by 2023 was a pipe dream.

TAI signed a pre-concept design agreement with British Aerospace for the “100% Turkish” aircraft. But the planned aircraft does not have an engine; Turkey will have to depend on a foreign engine supplier. Procurement planners had to silently move the production target from 2023 to 2025-26. Analysts think even 2030 could be too optimistic. According to some analysts, the most realistic target is “never.”

While Turkey was investing in the TF-X, it was also a member of the US-led multinational consortium building the next-generation F-35 Lightning II fighter jet. But because Turkey insisted on operating a Russian air defense system on NATO territory, its membership in the F-35 (Joint Strike Fighter) program was suspended. The first two F-35s built for the Turkish Air Force remain at a site in the US.

Ankara said it would sue the consortium to get its money back and take the matter to international arbitration for resolution, but according to the multinational F-35 contract, no partner can take a consortium decision to international arbitration. That is a legally binding clause in the contract Turkey signed and cannot be overruled by Ankara.

Erdoğan responded by announcing that Turkey is willing to turn its back on the consortium and purchase the Su-35 or the more advanced Su-57 fighter aircraft from Russia, its new military partner. This is another mistake. Moscow initially said it is prepared to sell fighter jets to Turkey—but by “sell” it means “off-the-shelf,” with no technology transfer. In the F-35 program, Turkey would have been an equal partner.

Worse yet, Turkey and Russia have hugely divergent interests in Syria. Their unbridgeable differences over the future of that Arab state have brought Ankara and Moscow to a military crisis in the strategically important Syrian town of Idlib, where Syrian forces, with Russian air support, killed 34 Turkish soldiers on February 29. That incident forcefully reminded Ankara of the bitter truth that there are limits to any Turkish-Russian partnership.

Ankara does not know whether it should activate the S-400 system or, indeed, whether it can trust the Russians at all. Will the Russians sell fighters to

Turkey and share technology? Or has Ankara invested too much on an emerging bloc with Russia? Was it all too good to be true? Probably.

Next-generation battle tanks

One of the most ambitious “100% Turkish” arms programs is the Altay, Turkey’s first homemade tank. After a private Turkish company built four prototypes of the Altay, the Erdoğan government awarded the serial production contract, worth billions of dollars, to one of Erdoğan’s business cronies.

On the technological level, this first Turkish tank has a serious problem: it has no engine or transmission system. These are not easy problems to solve.

Over the past couple of years, Altay executives have been rushing from one foreign supplier of engine and transmission systems to another without success. The Altay was originally designed to run on a German power pack (i.e., engine + transmission). But unfortunately for Ankara, Germany has persistently refused to issue export licenses for the critical parts that would make the Altay run on the battlefield. This is because of Turkey’s exponentially widening democratic deficit, which has ratcheted up European distrust of Ankara. Erdoğan thought he could have his cake and eat it too: simultaneously run Turkey with an iron fist, make Turkey an EU member, and have access to critical arms systems made in the democratic parts of the world.

The Altay program, like the air defense project, dates back to the mid-1990s. If some miracle happens and Altay’s serial production begins in 2020, first deliveries will still not enter the inventory before 2024. In other words, as in the case of the air defense system, Turkey will possess domestically produced tanks more than three decades after it decided it needed them.

Erdoğan’s bold deviations from western democratic norms and badly calculated, neo-Ottoman zigzagging between NATO and non-NATO state actors have left Turkey deprived of critical air defenses, fighter jets, tanks, and other systems at a time when Ankara is giving signals that it wants to play hardball with a rising number of regional and other adversaries.

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