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UAVs and beyond: Security and defence sector at the core of Turkey's strategy in Africa

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Turkey's Africa policy has entered a new phase characterized by a rapid expansion of security and defence ties. The driving forces behind this development have been the efficiency displayed by Turkish Unmanned Aerial Vehicles (UAVs) and the Turkish government's political and economic need to revitalize its projection towards the continent. Although most of the international focus is on Turkey's UAVs, its defence portfolio goes far beyond drones. Infantry weapons, naval equipment, helicopters, and armoured vehicles are just some of the items that the Turkish defence industry offers African countries. As a result, Turkey has gained an increasingly significant position on the continent in terms of security and defence. As President Erdoğan's recent journey to West Africa highlighted, security cooperation has become an important bargaining chip. Turkey is exploiting the interest of African countries in its weaponry to gain economic benefits and broaden its political influence. As Turkey's security cooperation expands beyond its longstanding African partners, Turkey will also have to renegotiate relations with traditional Western partners such as the United States (US) and France, as well as extra-regional competitors such as Russia and China.

Between 2017 and 2020, domestic politics and other foreign policy priorities led Turkey to reduce the weight of Africa in its foreign policy. But since 2020, the security dimension, which used to be a minor factor in relations with African countries, has become a Turkish policy focus on the continent. Turkish Unmanned Aerial Vehicles (UAVs, i.e. drones) have led the way. In 2021, Turkish UAVs captured the attention of the media and international players. Their use in Libya and in the Nagorno-Karabakh conflict revealed the level of performance achieved by some Turkish combat drones, most notably the Bayraktar TB2. Besides the efficiency exhibited on the battlefield, the fame of Turkish UAVs is due to their comparatively low cost. High performance at affordable prices has made Turkish-manufactured drones some of the most sought-after items in the international defence market.¹ Among the countries that have begun to inquire about UAVs from Ankara, there are also an increasing number of African states. African states' interest in drones and, more generally, in Turkish defence equipment has given new impetus to the Turkish agenda toward the continent.

¹ Rossiter, Ash. 2021. "Turkey's Path to Drone Power." Abu Dhabi. TRENDS Research and Advisory.

While Turkish-made UAVs have provoked considerable international attention, Turkey's defence portfolio goes far beyond them. The widespread popularity of Turkish drones has acted as a driving force for the entire Turkish military-industrial sector and allowed Turkey to strengthen the security dimension of its ties with African countries. Infantry weapons, naval equipment, helicopters, and armoured vehicles are just some of the items that the Turkish defence industry can offer to African countries. As a result, Turkey has gained an increasingly significant position in security and defence on the continent. At the same time, Turkey has exploited the booming popularity of its defence firms to broaden its projection westward. President Erdoğan's recent journey to West Africa confirmed this trend, highlighting how the security dimension has become an important bargaining chip.

This policy brief looks at the factors that have led to the increase of the military dimension in relations between Turkey and African countries. It is divided into three sections. The first highlights the domestic determinants that have favoured the increasing relevance of the defence industry in Turkish foreign policy and, particularly, toward Africa. The second section analyses the way in which Turkey has exploited its defence industry as a trading asset in its relationships with African countries such as Nigeria, Ethiopia and Niger. It highlights how the defence sector has allowed Turkey to strengthen its ties with regions where it had little presence. Finally, the third section explores the implications of this policy both on African power balances and in the wider competition among extra-regional players.

A new phase in Turkey's Africa policy

In 2005, the Turkish government led by Recep Tayyip Erdoğan proclaimed the Year of Africa.² Turkey's goal was to steadily increase political and economic involvement on the continent, particularly in Sub-Saharan Africa. Since then, Turkey has employed various tools to consolidate diplomatic and economic relations with African countries. A widely used tool in Turkey's overtures to Africa is travel diplomacy. As Prime Minister and then as President of the Republic, Erdoğan has conducted official visits to 30 of the 54 African states – more than any other non-African leader. The Turkish approach follows a twofold rationale. On the one hand, Ankara intends to distinguish itself from other non-African players whose leaders rarely and sporadically visit Africa. On the other hand, the meetings have domestic political goals. Erdoğan's bilateral visits, covered by the majority of Turkish media, are intended to increase Turkish public knowledge of Africa and project domestically the image of a country that plays an active role in the international arena.

Beyond official diplomacy, Turkey has implemented a multidimensional strategy to increase economic and cultural relations. It has followed a road map of semi-coordinated actions among state agencies and civil society organizations (CSOs) to strengthen pre-existing ties and establish new ones.³ Although Turkey's government dropped the practice of outsourcing Turkish public diplomacy to CSOs in the wake of the 2016 coup attempt, this policy proved helpful in branching out Turkish presence on the continent. Following 2016, the Turkish approach to Africa went through a transitional phase characterized by a scaling-down of commitment and wait-and-see policies.

² Several articles analyse the opening of relations between Turkey and Africa. See, for example: Özkan, M., & Akgün, B. (2010). Turkey's opening to Africa. *The Journal of Modern African Studies*. 48(4).

³ Donelli, F. (2022). Turkey's involvement in Sub-Saharan Africa: an empirical analysis of multitrack approach. *Journal of Contemporary African Studies*. 40:1.

Since 2020, Turkey's African agenda has expanded in a domain that was poorly developed until then: the security and defence sector. Turkey's role in security and defence matters has been confirmed during President Erdoğan's recent trip (October 2021) to three important African countries: Nigeria, Togo, and Angola. The African tour conducted by Erdoğan and several of his ministers in 2021 took on greater importance than previous ones due to domestic factors in Turkish politics and the issues at the centre of discussions with African partners. Through these bilateral meetings, the distinctive traits of Turkey's current approach to Africa emerged. Among those, the centrality of the defence and security sector in future relations between Turkey and African states became particularly evident.⁴

The new relevance of defence is due to both opportunity and underlying political factors. The former include the growing demand and diversification of the African arms market, which have created opportunities for Turkey and other emerging producers. Turkey now intends to capitalize on investments made over the last fifteen years in the defence industry to increase exports to Africa and other regions. The latter pertain to domestic political dynamics in Turkey. Since the failed coup of 2016, Turkey's foreign policy, including policy toward Africa, has increasingly reflected the interests of the political and economic elite close to the President. Turkish companies close to the Justice and Development Party (Adalet ve Kalkınma Partisi, AKP) or with personal ties to the President's circle, such as Lidya Madencilik in the mining sector,⁵ Aksa Enerji in the energy sector, and the Albayrak group in the port logistics sector, have influenced Africa policy. The pro-government business block's increasing involvement in policymaking reflects patterns of crony capitalism. This trend has progressively extended to the defence sector. The oft-mentioned Bayrak, Katmerciler, and Barer Holding are companies that have a voice in the policymaking process, especially toward Africa.

The centralization of powers in the President's Office also affected the military and the defence industry. The executive has increased the oversight of private and public companies in the defence sector. The Presidency of Defence Industries (Savunma Sanayii Başkanlığı, SSB), a state agency founded in 1985, has acquired a primary role. At Erdoğan's behest, in 2018, the agency joined the ranks of special institutions affiliated directly with the Office of the Presidency. The SSB's organizational structure was reorganized, reconfiguring its functions and powers. The agency has increased its efforts to promote the interests of the Turkish defence industry. The SSB coordinates exports of military technology and hardware and is officially placed under the President's direct control.

This growing mingling of the economy with government has inevitably affected Africa policy. The agency now has a key role in Turkish defence and foreign policymaking and in shaping Turkey's Africa policy. SSB executives, including Director Ismail Demir, regularly accompany Erdoğan on official visits abroad. Among the SSB's subsidiaries are some of Turkey's leading defence companies, such as the giant Turkish Aerospace Industry (TAI). However, the power of the SSB has transcended its institutional prerogatives by gaining influence over the defence manufacturers' association, the Savunma Sanayii İmalatçılar Derneği (SaSaD). All defence companies operating in Turkey are members of SaSaD. In other words, the SSB has become the connecting institution among private defence companies, state-owned corporations, the Turkish armed forces, and the AKP political elite under the direct supervision of the President's office.

⁴ France24 with AFP. 2021. "Armed with drones, Turkey explores African arms sales." *France 24*, December 15, 2021.

⁵ Africa Intelligence. 2020. "GUINEA: Turkish tycoon and Erdogan pal, Ahmet Calik embarks on mining adventure." *Africa Intelligence*, January 14, 2020. Africa Mining Intelligence.

In order to encourage exports of Turkish military equipment in Africa, Ankara has developed diplomatic promotion and financial incentive tools. This includes Turkish military attachés, whose number on the continent has increased significantly in recent years and who are now present in nineteen African countries. To provide financial incentives, Turkish authorities have expanded the competencies and power of Türk Eximbank, thereby following the example of other extra-regional players. Like the more famous Exim Bank of China, the Turkish credit institution provides financial assistance to African countries wishing to invest in Turkish goods or projects. For some years, Türk Eximbank has been an asset for the construction and manufacturing sectors, encouraging trade agreements between African financial institutions and Turkey. But more recently, it has displayed a growing readiness to provide loans at low-interest rates to African countries to facilitate the purchase of Turkish-made military hardware.

Drones as a bargaining chip

Drones have given Turkey's defence sector a definitive boost by opening up the global market to Turkish products. Most of the recent interest shown by African states in Turkish defence industry items is geared toward Turkish-made UAVs. They proved game-changing in the conflicts in Libya and Nagorno-Karabakh. Beside their efficient battlefield performance, Turkish drones are very good value for money. They have shown combat efficiency in Libya, Syria, and Azerbaijan. At the same time, they are cheaper – TB2 costs on average between \$1m to \$2m per unit – than Israeli – \$10m per unit/Heron – or US-made – \$20m per unit/Predator – UAVs. Turkey now has approximately 130 combat and surveillance drones of various designs. The development of indigenous drone capabilities is not fortuitous, but the result of a concerted, top-down effort that began in 2009.

Investments in research and development have spurred growth throughout the whole defence industry. The Turkish arms portfolio does not limit itself to drones, but has become increasingly comprehensive. Companies such as Otokar, BMC, and Roketsan produce weapons, naval equipment, helicopters, armoured vehicles, and more. One of the most successful Turkish products is the armoured vehicles produced by Katmerciler, which are currently used by Senegal, Mali, Niger, Uganda, and Kenya. Another Turkish item encountering great success in Africa is the Cobra armed vehicle produced by Otokar.⁶ Ivory Coast is among the countries that have recently purchased such vehicles. The order from the Ivorian armed forces allowed Turkey to expand its market westward.

Drones, and Turkish-made military hardware more generally, have become a precious bargaining chip in economic and political negotiations with African counterparts. This recently became evident in both Ethiopia and Nigeria. The former is undoubtedly the most controversial, since the supply of combat UAVs came during a dramatic phase of the conflict between the Addis Ababa federal government and the federal state authorities of Tigray. Ethiopian Prime Minister Abiy Ahmed began to show express interest in acquiring TB2 drones in spring 2021. Following several weeks of under-the-radar talks, the negotiations culminated with the Ethiopian Prime Minister's August visit to Ankara. During that visit, Erdoğan gave the green light for the sale of combat drones to Ethiopia. In exchange, and in addition to the economic gain from the sale, Turkey obtained the closure of ten

⁶ Cannon, Brandon J. 2021. "Turkey's Defense Industry and Military Sales in Sub-Saharan Africa: Trends, Rationale, and Results." Abu Dhabi. TRENDS Research and Advisory.

schools belonging to Gülen's movement and their subsequent transfer to the state agency Maarif Foundation.⁷

Drones have also increased Turkish bargaining power in Nigeria. Nigeria's importance for Turkish interests is more significant than that of any other West African country. Beside being one of the countries in sub-Saharan Africa with which Turkey has had the most longstanding relations, Nigeria is also one of its main trading partners. The trading volume between the two countries is approximately 2 billion dollars. The centrepiece of trade relations is the energy sector. Almost 95% of Nigerian exports to Turkey are oil and Liquefied Natural Gas (LNG). Many of Turkey's energy supply contracts expire in the second half of 2022. Consequently, there is a risk of limited energy provision for Turkey in the winter of 2022/23. Therefore, Erdoğan's October 2021 meeting with his Nigerian counterpart Muhammadu Buhari laid the groundwork for renewing the current energy agreement with Nigeria. The two presidents also explored the possibility of increasing Nigerian energy exports in the coming years. In return, Turkey has shown willingness to sell its drones to Abuja. Turkish drones could help Nigerian security forces in countering armed groups active throughout the country. Turkish interest in Nigeria, however, does not only concern hydrocarbons. For some time now, Turkey has allegedly opened a channel with the Nigerian state of Zamfara for concessions in the field of gold mines. In recent years, the state of Zamfara has had to face an increase of banditry that has caused economic and social problems. The state's governor, Bello Mohammed Matawalle, has received the green light from Abuja to deal with UK and Turkey the purchase of armed drones in exchange for mining concessions.

However, the Nigerian purchase of TB2s has been slowed down by US sanctions imposed after the Turkish intervention in the Nagorno-Karabakh conflict. Some key components, such as the electro-optical and infrared (EO/IR) imaging and targeting system (Wescam MX-15) equipped by the TB2, are supplied by L3Harris Technologies. Washington holds the right to block any military hardware sale that involves American components. The United States is particularly wary of such sales to Abuja because of its human rights violations. After the war between Azerbaijan and Armenia, Canada adopted a similar policy towards Turkey. To cope with this, Turkey has followed two routes. The first has led to the development of equipment patented and produced by Turkish companies, such as the optronic systems designed by Aselsan. Ankara aspires to develop the know-how and capabilities to produce drones that are 100 percent Turkish. While the quest for greater strategic autonomy is a medium-term goal, in the short term, SSB has tried to circumvent the constraints imposed by sanctions. This approach succeeded in the case of drone sales to Morocco and Ethiopia. In the former case, the Moroccan Air Force and not the Turkish TB2 manufacturer Baykar purchased the components produced by the American company L3Harris. Therefore, TB2s became operational on Moroccan soil without any vetoes or sanctions. In the Ethiopian case, Turkey chose to assemble TB2s at the Bishoftu air force base not far from Addis Ababa. Some components were shipped directly from the Turkish military base in Çorlu.⁸ Simultaneously, other cargo flights operated by Azerbaijan's Silk Way West Airlines travelled the Baku-Addis Ababa route carrying some of the TB2's components of aircraft used in the Nagorno-Karabakh conflict.

Ethiopia and Nigeria were not the only African countries considering the purchase of Turkish drones and other military hardware. Erdoğan's visit to Angola (October 2021) aimed at signing trade agreements, especially in the agribusiness sector. Erdoğan and Angolan

⁷ Haberler, Öne Çıkan, Güncel Duyurular, İhale İlanları, and Fuarlar. 2021. "Türkiye Maarif Vakfı, Etiyopya'daki FE-TÖ'ye Ait Tüm Okulları Devraldı." *Türkiye Maarif Vakfı*, August 12, 2021.

⁸ Plaut, Martin. 2021. "BREAKING: Turkish Drones Reportedly Being Constructed in Addis." *Eritrea Hub*, July 14, 2021.

President João Lourenço talked about the possibility of collaboration in the energy and security sectors. As with Nigeria, Turkey is very interested in Angolan hydrocarbons, which would further diversify Turkish imports. In return, Ankara can offer help with modernizing Angola's military. Similarly, during his visit to Togo (October 2021), Erdoğan also showed readiness to increase defence ties. The government of President Faure Gnassingbé has recently approved a plan reforming the military sector that foresees significant investments over the next five years. Even before the bilateral meeting, this ambitious plan prompted Turkish envoys to work on getting a primary role in the process. Turkey can contribute armed vehicles, coastal patrol vessels, equipment, weapons, and training. Erdoğan's visit served to present the Turkish offer, which includes Türk Eximbank loans.

Furthermore, Baykar, whose defence division is headed by President Erdoğan's son-in-law Selçuk Bayraktar, has established contacts with two other African countries, Niger and Rwanda. For different reasons, both countries are important to Turkey's ambitions in Africa. After finalizing agreements to deliver TB2s and TAI Hürkuş training aircraft, Niamey is negotiating with other Turkish firms – Nurool Makina and Aselsan – to enhance its military capabilities. Turkish policymakers consider Niger as the gateway to expanding its influence to the Sahel region. After a few years of stalemate, Turkey is likely to ask Niger again to use the former French military base Madama near the Libyan border. The Turkish idea is to establish in Madama a training camp on the model of Camp TURKSOM in Somalia in order to expand its footprint in the region. Turkey plans to get a military outpost in the Sahel and increase its role as special forces training in counter-terrorism and counter-insurgency. Strengthening security and defence ties could drive a further intensification of political relations. In the case of Rwanda, the purchase of drones would reinforce the country's military, which is engaged in crises such as Mozambique and the Central African Republic. Kigali has increased its influence, especially in the African security domain. Therefore, Ankara wants to boost further political and economic relations with one of Africa's most active players.

Regional implications

Recent Turkish efforts to revitalize its approach to Africa have highlighted two significant trends. The first concerns the geographical enlargement of Turkey's areas of strategic interest. Until 2019, the Turkish focus within the continent was on Eastern Africa, where Turkey was competing with Middle Eastern powers. Since then, external factors, such as the retrenchment of France's military commitment in Mali, have opened a window of opportunity westward. Other extra-regional players (China), above all Russia, are seeking to capitalize on this development, and Ankara is trying to do the same. Turkey aims to strengthen its presence in the Sahel and extend it throughout Western Africa. President Erdoğan's ambition is to create a 'Turkish Arc' of influence over sub-Saharan Africa.⁹ The second aspect that emerges concerns Ankara's willingness to exploit the defence sector as a tool of political diplomacy.

Other than in drones, Turkey is also becoming specialized in training special forces and police. Like the U.S. and the EU, Turkey contributes to the training of the Somali security forces. Turkish troops train approximately one-third of the Somali National Army (SNA). In particular, Turkey equips and trains the special units Gorgor (military) and Haram'ad

⁹ Tanchum, Michaël. 2021. "Turkey's Maghreb-West Africa Economic Architecture." Working Paper 03. Berlin. Centre for Applied Turkey Studies (CATS).; EPC. 2020. "Turkey's Expansion in the Sahel, the Sahara and West Africa: Motivations and Ramifications." Abu Dhabi. EPC.

(police). Following its work in Somalia, Ankara has consolidated its profile in training special units engaged in counter-terrorism and counter-insurgency operations. The capacity building of African security forces is, in principle, complementary to EU operations on the continent. However, Turkey does not seem interested in integrating its actions in this domain with European initiatives. Rather, it leverages the defence and security sector as a vehicle to increase its influence in Africa and gain the support of African countries in international organizations.

Turkey's ambition to expand its strategic sphere has significant implications. African countries can count on an additional defence and security partner that places less conditionality than others, for example the United States. African states enjoy access to defence equipment without conditionalities or constraints, and regardless of their record on democracy or human rights. The centralized nature of the current Turkish regime makes concluding defence agreements and memorandums of understanding much faster. The decision-making structure within the Office of the Presidency opens, conducts, and concludes the negotiating process.

Broadening the perspective, one of the most interesting issues concerns the implications of the Turkish approach in relations with other Middle East states active in Africa. Between 2017 and 2020, regional power competition was one of the determinants of Turkish military involvement in the Horn of Africa. However, the transitional phase opened with the election of U.S. President Joe Biden has generated a more conciliatory attitude by the main Middle Eastern players. Consequently, it is unlikely that in the coming months Middle Eastern rivalries will be exported to yet other third states, as happened in recent years in Somalia, Sudan, and, most of all, Libya. Instead, alignments that were unthinkable until a few months ago are now possible, as underlined in the Ethiopian conflict by the role of the UAE and Turkey, and in the troubled Sudanese political transition by Egypt and Qatar.

It is more plausible that frictions may emerge between Turkey and another extra-regional actor: Russia. The geographical enlargement of the areas of strategic interest and the use of the defence sector as a political tool place Turkey in a competitive position with Moscow. In the eyes of African states, Russia and Turkey present themselves as a sort of third way. In a global context characterized by multipolarity, Ankara and Moscow intend to represent an alternative for African countries to the relationship of dependence towards the West and the rising debt trap accompanying Beijing's policy on the continent. In the last decade, the relationship between Russia and Turkey has been characterized by the continuous search for balance through phases of competition, confrontation, and cooperation. The move into a partially new arena for both, such as the Sahel, may trigger the same dynamic with the risk of low-intensity or proxy clashes.

In West Africa, the most significant difficulties arise with France. Paris has watched with concern and irritation Turkish activism in an area considered part of its sphere of influence. Turkish officials, in turn, have fuelled anti-French sentiment in the region with statements and tweets. Furthermore, the two countries adopted conflicting stances on issues ranging from the Eastern Mediterranean to Libya. However, Franco-Turkish tensions have shown signs of easing as the presence of Russian mercenaries in the Sahel has increased. This trend is likely to continue in the coming months in light of the Russian invasion of Ukraine. In other words, the growing Turkish footprint in West Africa could become an obstacle to Moscow's intentions in the area.

Turkish policy in West Africa could also increase Turkey's strategic relevance in American eyes. Like Middle Eastern states such as the UAE, Turkey could be a partner in Washington's counterbalancing of Beijing's power on the continent. The Turkish government has hoped for some years now that it can regain relevance in the eyes of its U.S. ally thanks to its

enhanced political weight in Africa. In this regard, Turkey's recent interest in West Africa and, in particular, the Gulf of Guinea is not accidental. Chinese interests are focusing on the area. Beijing intends to open a military base in Equatorial Guinea – its second on the continent after Djibouti. From a U.S. perspective, the establishment of a military base on the African Atlantic shore is a dangerous development that increases military projection capacity toward the United States. Turkish policymakers view the consolidation of Turkey's footprint in the area as a win-win option for Washington and Ankara.

Growing Turkish defence exports to Africa could also have implications for conflict dynamics on the continent. The supply of military equipment, such as drones and armoured vehicles, and the training of special units will increase African governments' counter-insurgency capabilities. At the same time, there is a risk that Turkish-trained and -equipped forces will operate as regime protection units to counter opposition and dissent. An early indication of this trend arose last year during the tensions in Somalia between Prime Minister Roble and President Farmaajo. The latter deployed the Turkish trained Gorgor brigades as a private militia against other Somali special forces, including the US-backed Danab brigade. As for competition among regional states, Turkish military hardware is unlikely to transform the existing balance of power in the short term.

Looking ahead

The Turkish military-industrial complex's export campaign to Africa is much more top-down coordinated than in the past. Looking forward, an important variable in examining Turkish policies towards Africa concerns future domestic developments. Since 2005, Turkey's African agenda has depended mainly on domestic politics. Two issues are paramount: the resilience of Turkey's financial and economic system, as well as the outcome of the national elections scheduled for 2023. Turkey's precarious financial condition could have a fallout on the country's foreign policy, although its African policy is less vulnerable in this regard. The Turkish approach to creating relationships based not on economic dependence but partnership and people-to-people relationships has made them less dependent on financial resources. In other words, Turkish-African relations can withstand even phases of economic crisis. It is a different story regarding the country's political future. The upcoming 2023 elections constitute yet another important watershed in Turkish politics. An affirmation of the AKP-MHP alliance or any other AKP-led coalition would give continuity to the current approach to Africa. In contrast, an opposition victory would reconfigure foreign policy in a way that would also result in the downsizing of the African agenda.

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