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THE GULF LEAP FORWARD: TURKEY'S MILITARY-INDUSTRIAL ROLE IN SECURITY LOCALISATION

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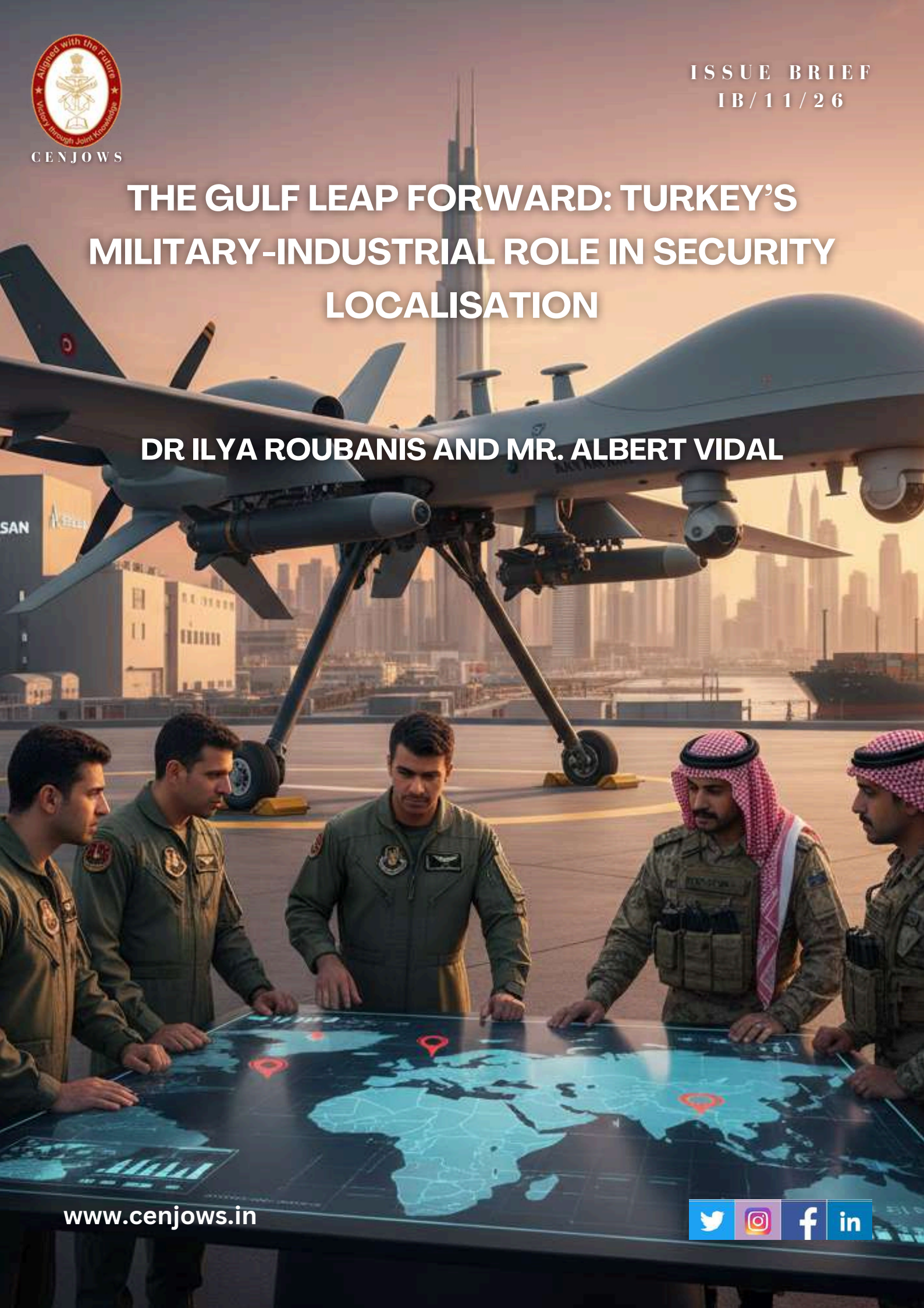

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The Gulf Leap Forward: Turkey's Military-Industrial Role in Security Localisation

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Summary

Turkey's defence diplomacy is defined by localisation sovereignty**:** the embedding of foreign subsystems, software, and payloads into Turkish platforms, and the adaptation of those platforms to partner doctrines under national control. Localisation sovereignty contrasts directly with bloc-based conditionality**,** in which access to platforms, upgrades, and exports is contingent on political alignment with a major power bloc, leaving operational autonomy hostage to supplier discretion. Turkey's approach instead is open to co-production, technology transfer, subsystem integration, and the sovereign command of mission software and data links. This posture positions Turkey as an amplifier of Gulf States strategic autonomy, enabling them to localise production, build resilient defence value chains, develop military platforms to respond to the bespoke needs of their own threat environments, and retain their strategic autonomy.

This paper traces how Gulf states, Pakistan, and Turkey have co-authored a localisation ecosystem. Innovation is driven by integrating subsystems from diverse technological bases, producing hybrids tailored to national strategies. The analysis examines the shift from procurement of standard platforms to co-production. It shows how dyadic partnerships – Turkey and the United Arab Emirates (UAE), Turkey and the Kingdom of Saudi Arabia (KSA), Turkey and Qatar – are reshaping regional defence logic into new industrial value chains. The main difference between the sum of these bilateral partnerships and other U.S. or European partners is that the Turkish

defence ecosystem is more politically reliable (Des Roches, 2017; Reuters, 2025) and strategically more open to technology-sharing, co-production, and bespoke accommodation to indigenous subsystems and payloads (Breaking Defence 2024). Flexibility of this kind is not unique to the Turkish ecosystem – the UAE's EDGE is working with Dassault to integrate a range of Emirati-produced ammunition onto the French Rafale (Breaking Defence, 2023) – but Ankara offers a more symmetrical partnership that shields operational autonomy rather than pursuing institutionalised dependency.

The argument put forward is as follows: the Turkey–Pakistan axis is a converging military-industrial ecosystem, whose value chains are cemented by cooperation with Gulf Cooperation States. Turkey supplies adaptable platforms and battlefield-tested systems; Gulf states contribute capital, payload innovation, localisation ambition, and the necessary scale required to create growth momentum; Pakistan provides a specific kind of engineering depth in systems integration from a range of military ecosystems – Swedish, French, U.S., Chinese, Russian – as well as data and doctrinal experience stemming from testing specific platforms in battle.

This convergence is visible in Turkish UAVs equipped with Emirati payloads, planned production of Turkish armoured vehicle in the KSA, Saudi UAVs built under license in Turkey, and Pakistani jet fighters that have Turkish, Chinese, Russian, British and Italian components. Prospectively, the Saudi–Pakistan Strategic Mutual Defence Agreement (Suraj Yadav et. al. 2025) adds a nuclear shadow to this architecture, which may include Turkish membership (Hacaoglu et. al. 2026). Containment of platform data, software, and operational lessons requires an environment conducive to intelligence sharing and strategic alignment, ensures trust and cumulatively generates diplomatic alignment in a closed loop. The Turkey–Gulf–Pakistan axis offers a blueprint for localisation-based defence integration: adaptable, resilient, and bloc-independent, suggesting that strategic autonomy is no longer the preserve of great powers. Dyadic localisation alliances now provide middle powers with strategic depth, deterrence, and industrial sovereignty, reducing reliance on great-powers.

Introduction – Strategic Realignment in Defence Procurement

Turkey's defence partnerships in the Gulf go beyond the sale of off-the-shelf platforms. Turkey is offering platforms open to local systems integration and is, in turn, contributing to local platforms, creating a symmetrical relationship. This industrial policy logic reflects a broader trend: the decline of bloc-based multilateralism and the rise of modular, function-first alliances led by assertive middle powers. These mini-lateral industrial policy arrangements in the defence industry are founded on co-production and technology transfer agreements, shared equity, joint ventures, and subsystem integration rather than top-down diplomatic and treaty alignment. They offer less predictability, but greater strategic and operational autonomy. Turkey is positioning itself as a procurement partner that amplifies the strategic self-reliance of its partners, building on strategic complementarity.

The analysis focuses on Turkey's defence partnerships in the Gulf. Gulf states no longer acquire Turkish systems as passive buyers. Qatar, the UAE, and the Kingdom of Saudi Arabia (KSA) are investing in the Turkish military-industrial complex to pursue their own localisation strategies. Turkey is building bilateral partnerships that are not underpinned by an assumption of diplomatic alignment or political conditionality. In fact, none of these partnerships is exclusive, with the UAE cultivating partners, such as Israel, that are considered regional spoilers by Turkey (Michael Tanchum 2025). However, Turkey is becoming a power to be reckoned with in the Gulf because Ankara facilitates localisation and the customisation of platforms to local needs.

Since 2021 the UAE and Turkey have been developing an ever-tightening industrial defence partnership (The National 2025). In 2022 the UAE inked an agreement for the acquisition of Bayraktar TB2s (Sinem Cengiz 2022, Ali Bakir 2022), followed by Akinci in 2023. These were "off-the-shelf" systems; however, as soon as 2024, the Bayraktar TB2s successfully tested the firing of the Emirati Desert Sting guided bombs initiating a process of more complex industrial cooperation (Ashish Dangwal 2025) that developed into subsystems integration. In 2023 Turkey's Aselsan signed a cooperation agreement with Calidus for the Turkish cockpit display/avionics solutions on UAE airborne platforms; Havelsan is developing ground simulators for training in this joint platform (Defence Turkey 2024). Most recently Aselsan's Korkut Air Defence

system was mounted onto the Wahash (8X8) armoured vehicle developed by the Emirati Calidus (Ahmet Kokcu 2025). In July 2025 the two states signed a framework agreement for the mutual protection of classified information between defence ministries, possibly laying the ground for joint research and development (Anadolu 2025). There are also ongoing discussions for the co-development of their respective training aircrafts (Hurkus, B-250) – and the co-development of a new aviation system (Defence Mirror 2025).

Saudi Arabia emerged as a major “off-the-shelf” client in 2023 with a deal to acquire Akinci Unmanned Aerial Combat Vehicles, an agreement that from the outset was framed by a co-production agreement with a localisation roadmap (Energy Terminal 2023, Coskun 2025, SPA 2023, Rasanah 2024, Defence Security Asia 2025). Along this route, the Saudi Arabian Military Industry (SAMI) is signing a series of co-production agreements (Cranny-Evans 2025, Arab News 2025) with Turkish defence companies, going beyond UAVs to manufacture military vehicles (Nurol Makina), armoured combat vehicles (FNSS), and weapon turrets (Aselsan). This trend fits the Kingdom’s 2030 objective to localise 50% of its defence spending by 2030 and, in this context, there was a less referenced deal with Turkey’s ESEN to manufacture a Saudi-designed unmanned aerial vehicle in Turkey, the first time Saudi intellectual property will be produced abroad (Gower 2025). The scope of cooperation is likely to widen further, with rumours of a $6bn dollar deal (Daily Sabah 2025) under negotiation, widening the scope of the procurement partnership between them to include warships, tanks, and missile systems.

Qatar was the first Gulf country to seriously engage Turkiye in the defence domain, a relationship closer to a traditional security provider-and-consumer partnership but not in hegemonic terms (Clingendael 2021). Doha has been allowed to build equity in the Turkish military-industrial complex and share critical technologies. Even as Qatar buys a range of Turkish systems of-the-shelf (Tayfun Ozberk 2026), the Qataris are shareholders in Turkish armoured vehicle production (BMC), and established a JV with Aselsan and SStek in 2018 to develop and produce electro optic equipment, crypto technology and conduct research related to remote weapon platforms, although it is unclear if any progress has been made in that front. Barzan also appears to have purchased a stake in Pavo Group, and has entered partnerships with Turkey’s MKE

and ASFAT (Qatar Tribune 2018). This far-reaching technological cooperation web is framed by intelligence sharing and the presence of a Turkish military base (mfa.gov.tr 2025, Abouyoussef 2024).

Turkey's defence partnerships with the Gulf states, but also Pakistan, Malaysia, Bangladesh, and others are built on a procurement culture open to technology transfer and political symmetry. These procurement partnerships are transactional without political conditionality of the kind one encounters in a NATO's collective security ecosystem. Turkish procurement underpins security cooperation that is diplomatically compartmentalised in bilateral partnerships. Nonetheless, the sharing of platforms gives rise to an ecosystem whereby Turkish procurement partners share doctrinal lessons and technological innovation stemming from battle-testing, while also ultimately sharing research and development costs. That is the difference between plurilateral and multilateral arrangements, namely that sharing is not normatively framed but rather facilitated by Turkiye.

From Clients to Co-Producers

For decades, Gulf defence procurement was shaped by Great Power patronage. US, UK, and French platforms have long dominated Gulf defence inventories, supported by permanent military bases, strategic partnerships, and bundled procurement agreements (Ferragamo et al., 2025). These systems offered prestige and deterrence while also embedding dependency. Sovereignty was constrained by supplier discretion, and operational autonomy was often subordinated to alliance politics. Export licences were subject to political conditionality, and battlefield deployment frequently required diplomatic clearance. In one documented case, German restrictions on arms exports to Saudi Arabia, imposed after the Khashoggi assassination, were circumvented by rerouting deliveries through Rheinmetall's Italian and South African subsidiaries, exposing both the fragility and workaround logic of European supplier coordination (Martorell Junyent, 2023). Similarly, the Italian government suspended exports to both the KSA and the UAE in 2019, a ban eased in 2021 and lifted in 2023 (Reuters 2023). U.S suppliers have similarly had to deal with obstruction of exports in the House of Representatives and there is an overall rigid

regulatory environment, resistant to the export of strategic technologies (Des Roches, 2017; Reuters, 2025).

Over time, an evolving political context in liberal democracies, various export bans, diverging threat perceptions, and reputational constraints eroded the credibility of legacy procurement partnerships with the West. Gulf states faced delays in spare part deliveries, restrictions on battlefield deployment, and uncertainty around future upgrades. The logic of deterrence was increasingly decoupled from the logic of control and self-reliance. Even when platforms were technically available, their operational utility was hostage to supplier discretion. This created a strategic imperative to diversify procurement and create a localisation path that would enable regimes to hedge their reliance to diverse partners and increase the resilience of the defence supply chains that guarantees their operational autonomy.

Turkey's appeal in this context lies not in price or ideology, but in its ability to deliver subsystem flexibility and co-production pathways (Knightsbridge Strategic Group 2024) without human rights conditionalities or political caveats. Ankara's ability to compartmentalise relations has been "battle tested." Despite supplying drones and MILGEM Corvettes to Ukraine, Turkey maintains defence and industrial cooperation with Russia (Mamdouhi, 2025). This strategic ambiguity is a feature Gulf states appreciate in a global system in which major security providers are either reluctant or unable to provide umbrella security guarantees. For Gulf states, this contractual relationship offers security resilience, as it ensures they can engage in conflict in their own terms. This is further enhanced by Turkey's willingness to engage in co-production, technology and doctrinal experience transfer. Put otherwise, procurement partnerships enable rather than constrain the ability of Gulf States to deploy in war theatres.

Whereas Western suppliers retain tight control over their strategic platforms – restricting upgrades or embedding proprietary battlefield doctrine (Kearney 2023) – Turkey adopted a markedly a model of procurement partnership that prioritises combat-proven platforms and competitive prices. While Turkey does set proprietary safeguards regarding third-user exports (OECD), Ankara is known to offer faster approvals, and more flexible end user terms, with precedents of Turkish arms found

in UN embargoed zones where Gulf States are engaged by proxy (Arab Weekly 2025, Ali Bakir 2024, Washington Post 2025, Ciddi & Eppley 2025, Africa Centre for Strategic Studies 2025).

The thrust of Turkey's policy, however, is openness to engage with localisation strategies substantively. For instance, through the SAMI-Baykar partnership, SAMI claimed it aims to locally produce 70% of the Bayraktar Akıncı UCAVs, in what amounts to Turkey's largest ever aviation export contract (Binnie 2025; Reuters 2023; Tiwari 2023). The deal includes a production line in Riyadh (Defence Turkey, 2023a). While the UAE does not manufacture Turkish UAVs in the UAE, local payloads have been mounted on Bayraktar TB2s. The overall trajectory is towards further cooperation in research, manufacturing, and development (Baykar 2024, EDGE 2024).

Turkey is open to modular contributions to platforms developed by non-NATO partners in the Gulf, and beyond. There are several case studies: ASELSAN's Korkut Air Defence system was mounted onto the Emirati Wahash (8X8) armoured vehicle and ASELPOD targeting systems (Roubanis 2024, Defence Web 2022) are mounted onto Pakistan's JF-17 fighter – now considered by the Saudi Airforce (Reuters 2026). The JF-17 is a battle-tested Pakistani platform with Chinese electronics, a British ejection system, an Italian radar, and Russian engines (ZNews 2025, Defence Security Asia 2025), able to accommodate payloads of various origins. This industrial logic offers partners a viable pathway to innovation and localisation based on systems integration from diverse ecosystems. Ankara's approach is to fuse their defence ecosystem with "peer" Middle Powers, assuming a distinct role in research and development rather than fostering a crude patron-client dependency.

The key for Turkey's value proposition is ensuring its systems are battle tested. In Libya, the UAE found itself in the opposite side to Ankara, which sided with the UN-recognised Tripoli government against Khalifa Haftar's Libyan National Army (LNA). There, the UAE came across not only Turkish UAV's but also the Koral, Turkey's electronic Warfare System, which were able to disrupt Emirati-supplied Chinese-made Wing Loong drones (Ali Bakir 2021). Battlefields for Turkey are Research and Development labs, testing factors such as performance and survivability in real conditions (Dan Zeevi 2026, Roubanis 2025).

Pakistan as Strategic Anchor

In many respects, Pakistan operates as a branch of the Turkish defence ecosystem (Reuters 2026). Like the UAE, it develops its own payloads for Turkish platforms, exemplified by the Bayraktar TB2 displayed with Pakistan's BARQ missile alongside Roketsan's MAM-L (TurDef, 2024). This reflects a broader pattern of modular integration rather than a Gulf-specific anomaly. The Turkish ecosystem is sustained by data sharing: platforms are battle-tested in different theatres, most recently in Kashmir, with lessons migrating across partners to feed incremental development (Carnegie, 2025). Pakistani engineers are central to this process. Nearly 200 engineers and officials have been engaged in the KAAN fighter programme (Janes, 2025, Janes, 2021).

However, Pakistan also provides Turkey with an additional anchor to the Gulf. Pakistan's defence ties with Saudi Arabia, the UAE, and Qatar are longstanding, rooted in deployments of Pakistani contingents since the 1960s and formalised through defence protocols in the 1970s (PGurus, 2025). From the early presence of Pakistani officers in Saudi command structures, to the formative role of Pakistani leadership in the UAE Air Force, and the institutionalisation of cooperation with Qatar under the Higher Military Cooperation Committee, Islamabad has consistently acted as a guarantor of Gulf military preparedness (Gulf International Forum, 2015; UAE Stories, 2025; MOFA Pakistan, 2025. These ties culminated in the Strategic Mutual Defence Agreement signed in Riyadh in September 2025, pledging collective security between Pakistan and Saudi Arabia (Gulf News, 2025; Al Jazeera, 2025).

There is now wide speculation that Turkey is ready to join the Saudi-Pakistani partnership. Irrespectively of whether or not Ankara takes this step, its partnership with Pakistan is a source of engineering and doctrinal experience that is not usually accessible to NATO member states. By situating Turkish designs in Pakistan's military-industrial complex, Ankara can integrate subsystems of mixed origin, including Chinese and Russian, without triggering alliance vetoes. Pakistani engineers, officers, and pilots thus provide the human capital that circulates operational data across theatres and strengthens Gulf-facing deployments (Kamal Amal 2026, FlightGlobal 1999). In the air domain, Pakistani pilots continue to shape Gulf air doctrine through secondments and training roles (Javed Hafeez 2025, Umer Karim 2025), while officers

embedded in Gulf command structures act as doctrinal translators, aligning Turkish platform logic with Gulf battlefield requirements (Roubanis 2025)

The Turkey–Pakistan–Gulf defence relationships are not a formal alliance, but a converging ecosystem built from overlapping dyads. Turkey contributes modular platforms and military experience in a range of theatres, the Gulf provides financing, payload innovation, and export ambition; Pakistan offers operational depth, engineering expertise, and training infrastructure (Atlantic Council, 2025; Gulf International Forum, 2015). Together, these relationships form a flexible architecture that redefines regional defence logic.

This convergence is already shaping procurement and platform development. Turkey's fifth generation fighter programme – the KAAN – is reportedly being considered by some Gulf states (Turkiye Today 2025, Defence Security Asia 2025, Milliyet 2024, Ali Bakir 2025). The Turkish platform posits fewer operational restrictions, promises reduced operational costs, and provides localisation opportunities not available with the F-35 programme. Some Gulf states have reportedly expressed interest in financing KAAN variants tailored to their threat environments, while Pakistani pilots and engineers are expected to contribute to testing and operational calibration.

Conclusion

The cumulative result of these bottom-up dyadic relationships – Pakistan and Turkey, the UAE and Turkey, Saudi Arabia and Turkey, Qatar and Turkey – is an ecosystem that is more than the sum of its parts for two reasons. While Turkey and Pakistan facilitate value chain resilience and amplify strategic autonomy, Turkey shares data, tactical and doctrinal lessons, technology, and human capital with its partners. That is an alliance in effect, not framed by normative principles.

In sum, bloc conditionality is giving way to dyadic localisation alliances that create functional interdependence. The Turkey–Gulf–Pakistan axis demonstrates that strategic depth and deterrence can be achieved through industrial integration, export autonomy, and sovereign command logic without reliance on "legacy" great-power hierarchies. It is true that the 2025 Saudi–Pakistan Strategic Mutual Defence

Agreement adds formalised deterrence weight to this ecosystem, potentially with Turkiye as a silent partner, signalling a path towards collective defence. However, fracture is also possible, particularly given the strategic friction between the UAE and KSA and the prominence of Israel as a competitive military-industrial complex in the region.

DISCLAIMER

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