



**NAVAL  
POSTGRADUATE  
SCHOOL**

**MONTEREY, CALIFORNIA**

**THESIS**

**A CHANGING LANDSCAPE: TURKEY'S DRONE  
DIPLOMACY IN SUB-SAHARAN AFRICA**

by

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March 2023

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<b>REPORT DOCUMENTATION PAGE</b>			<i>Form Approved OMB No. 0704-0188</i>	
Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instruction, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Washington headquarters Services, Directorate for Information Operations and Reports, 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302, and to the Office of Management and Budget, Paperwork Reduction Project (0704-0188) Washington, DC, 20503.				
<b>1. AGENCY USE ONLY (Leave blank)</b>	<b>2. REPORT DATE</b> March 2023	<b>3. REPORT TYPE AND DATES COVERED</b> Master's thesis		
<b>4. TITLE AND SUBTITLE</b> A CHANGING LANDSCAPE: TURKEY'S DRONE DIPLOMACY IN SUB-SAHARAN AFRICA			<b>5. FUNDING NUMBERS</b>	
<b>6. AUTHOR(S)</b> Philip J. Watterson				
<b>7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES)</b> Naval Postgraduate School Monterey, CA 93943-5000			<b>8. PERFORMING ORGANIZATION REPORT NUMBER</b>	
<b>9. SPONSORING / MONITORING AGENCY NAME(S) AND ADDRESS(ES)</b> N/A			<b>10. SPONSORING / MONITORING AGENCY REPORT NUMBER</b>	
<b>11. SUPPLEMENTARY NOTES</b> The views expressed in this thesis are those of the author and do not reflect the official policy or position of the Department of Defense or the U.S. Government.				
<b>12a. DISTRIBUTION / AVAILABILITY STATEMENT</b> Approved for public release. Distribution is unlimited.			<b>12b. DISTRIBUTION CODE</b> A	
<b>13. ABSTRACT (maximum 200 words)</b>  Turkey increasingly sees itself as mid-tier power capable of projecting influence from beyond its near periphery. This research examines the motivations for Turkey's overtures to sub-Saharan Africa within the broader context of its evolving foreign policy. It also explains how Turkey fulfills a growing role within the sub-African market with unmanned aerial vehicles (UAVs), or drones, by examining case studies of Ethiopia and Nigeria, among others. Moreover, it explores the implications—both domestic and within sub-Saharan Africa—that arise from Turkey's use of drones as a tool of its foreign policy. Many contemporary authors look at the role of Turkey's drone sales in the context of the last few years when Turkey initially exported drones. This thesis argues that Turkey's drone outreach continues the evolution of Turkey's foreign policy from at least the early 2010s, and the growing sub-Saharan African market provides Turkey with new opportunities to project influence while serving domestic economic and political interests. Finally, Turkey's rapid increase in drone sales also highlights how the security landscape of sub-Saharan Africa continues to shift. This change and Turkey's increased involvement in the region contribute to a potentially significant, though still nascent, impact on the interests and policy of the United States across the region.				
<b>14. SUBJECT TERMS</b> Turkey, Türkiye, sub-Saharan Africa, drone, UAV, unmanned aerial vehicle, TB2, MQ-9, drone diplomacy, Erdoğan, Ethiopia, Nigeria, Niger, Bayraktar, Baykar, AKP, Justice and Development Party			<b>15. NUMBER OF PAGES</b> 93	
			<b>16. PRICE CODE</b>	
<b>17. SECURITY CLASSIFICATION OF REPORT</b> Unclassified	<b>18. SECURITY CLASSIFICATION OF THIS PAGE</b> Unclassified	<b>19. SECURITY CLASSIFICATION OF ABSTRACT</b> Unclassified	<b>20. LIMITATION OF ABSTRACT</b> UU	

NSN 7540-01-280-5500

Standard Form 298 (Rev. 2-89)  
Prescribed by ANSI Std. Z39-18

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Submitted in partial fulfillment of the  
requirements for the degree of

**MASTER OF ARTS IN SECURITY STUDIES  
(MIDDLE EAST, SOUTH ASIA, SUB-SAHARAN AFRICA)**

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## ABSTRACT

Turkey increasingly sees itself as mid-tier power capable of projecting influence from beyond its near periphery. This research examines the motivations for Turkey's overtures to sub-Saharan Africa within the broader context of its evolving foreign policy. It also explains how Turkey fulfills a growing role within the sub-African market with unmanned aerial vehicles (UAVs), or drones, by examining case studies of Ethiopia and Nigeria, among others. Moreover, it explores the implications—both domestic and within sub-Saharan Africa—that arise from Turkey's use of drones as a tool of its foreign policy. Many contemporary authors look at the role of Turkey's drone sales in the context of the last few years when Turkey initially exported drones. This thesis argues that Turkey's drone outreach continues the evolution of Turkey's foreign policy from at least the early 2010s, and the growing sub-Saharan African market provides Turkey with new opportunities to project influence while serving domestic economic and political interests. Finally, Turkey's rapid increase in drone sales also highlights how the security landscape of sub-Saharan Africa continues to shift. This change and Turkey's increased involvement in the region contribute to a potentially significant, though still nascent, impact on the interests and policy of the United States across the region.

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## LIST OF ACRONYMS AND ABBREVIATIONS

AFRICOM	U.S. Africa Command
AKP	Justice and Development Party
AI	artificial intelligence
CEO	Chief Executive Officer
CIA	Central Intelligence Agency
COTS	commercial off-the-shelf
ECOWAS	Economic Community of West African States
EU	European Union
FDI	foreign direct investment
ISR	intelligence, surveillance, and reconnaissance
MAM	Mini Akıllı Mühimmat—“Smart Micro Munition” (Turkish)
NATO	North Atlantic Treaty Organization
NSS	National Security Strategy
PKO	peacekeeping operations
SETA	Foundation for Political, Economic, and Social Research
SIPRI	Stockholm International Peace Research Institute
TPLF	Tigray People Liberation Front
TSKGV	Turkish Armed Forces Foundation
UAE	United Arab Emirates
UAV	unmanned aerial vehicle
UMTAS	Uzun Menzilli Tanksavar Füze Sistemi—“Long Range Anti-Tank Missile System” (Turkish)
UK	United Kingdom
UN	United Nations
USAID	U.S. Agency for International Development
U.S.	United States
VEO	violent extremist organization

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## ACKNOWLEDGMENTS

I have enormous gratitude and respect for my thesis advisor, Professor Ryan Gingeras. His patience, understanding, and willingness to steadily challenge and support me throughout this process have been humbling and inspiring. I am also extremely grateful to my second reader, Professor Rachel Sigman. She consistently pushed me to consider new perspectives and make this thesis a better and more complete product. I am not sure I could thank you both enough. I would also like to thank Professor Christopher Darnton for reviewing portions of this thesis. In addition, the faculty and professors at the Naval Postgraduate School I have worked with over the last 18 months have been instrumental in changing how I think about and express complex ideas. Finally, a sincere measure of thanks is due to Ms. Sue Hawthorne and the NPS Thesis Processing Office. Collectively, this fantastic team has made this thesis better. Any shortcomings remain solely my own.

Most significantly, I would like to thank my wife, Lena. Her immeasurable patience, understanding, and support have made this work, and so much more, possible. Her strength is inspiring, and I am beyond fortunate to have such a supportive partner.

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# I. INTRODUCTION

## A. MAJOR RESEARCH QUESTION

Turkey increasingly sees itself as mid-tier power capable of projecting power and influence from beyond its near periphery, including toward sub-Saharan Africa. This research seeks to examine the motivations for Turkey’s overtures to sub-Saharan Africa within the broader context of its evolving foreign policy. Additionally, it seeks to explain how Turkey fulfills a growing security role within the sub-Saharan security market with unmanned aerial vehicles (UAVs), or drones,<sup>1</sup> and the implications that arise from Turkey’s use of drones as a tool of its foreign policy. Finally, this research examines the consequences of these sales and Turkey’s changing influence in sub-Saharan Africa on the interests and policy of the United States (U.S.) in the region.

## B. SIGNIFICANCE OF THE RESEARCH QUESTION

Turkey views itself as a rising power with increasingly broader ambitions to project influence from beyond its near periphery.<sup>2</sup> Over the last 20 years, it has looked beyond North Africa into sub-Saharan Africa to achieve some of these aims. However, much of the existing literature has not built upon the North African literature to explore these new overtures into sub-Saharan Africa. Only recently has there been a new push to understand the methods and implications of Turkey’s advances into the region.

One of Turkey’s unique capabilities is its ability and willingness to manufacture and sell relatively inexpensive, yet increasingly capable, drones and associated weapons to countries with few, if any, preconditions. While Turkey has demonstrated the capabilities of these drones within its periphery in conflicts ranging from Syria to North

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<sup>1</sup> For consistency, the phrase “drone” is used for UAV and other similar terms.

<sup>2</sup> “Türkiye’s Enterprising and Humanitarian Foreign Policy: A Synopsis,” Republic of Türkiye Ministry of Foreign Affairs, accessed May 28, 2022, <https://www.mfa.gov.tr/synopsis-of-the-turkish-foreign-policy.en.mfa>.

Africa, it has also sold drones to Ukraine and Azerbaijan.<sup>3</sup> These cases are notable because these countries have used them in armed conflict. Turkish drones have been shown to be capable and effective, and in the case of Ukraine, the drones have helped stymie an imposing and technically capable Russian military. Their successful use in Ukraine, Azerbaijan, Syria, and North Africa has created significant publicity for Turkey and helped it use drone sales as a meaningful way to gain influence and support an increasingly outward looking arms industry.<sup>4</sup>

Turkey has also started to sell drones within sub-Saharan Africa. One of the most visible and publicized examples is the sale of drones to Ethiopia and their subsequent use in the Tigray War. Other sub-Saharan countries, such as Angola and Nigeria, have inquired about drones or reportedly have contracts in place to purchase the drones.<sup>5</sup> The increase of Turkish drone sales in sub-Saharan Africa coincides with a greater outreach by Turkey across the sub-continent.

While the U.S. operates drones across Africa in support of national objectives and to assist partners in the region with security challenges, it has largely avoided selling drones with similar capabilities or price points, especially within sub-Saharan Africa. Many of the countries that Turkey is building relationships with have, from an American perspective, questionable human rights records that would impede the scope of the security relationship between the U.S. and countries potentially interested in purchasing these drones.

While there have been numerous reports about Turkey's drone sales abroad and within sub-Saharan Africa, there is little robust analysis about how these sales contribute to Turkey's goals of broadening its foreign policy influence from beyond its near periphery. This research aims to fill that gap and examine the equally less explored

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<sup>3</sup> Stephen Witt, "The Turkish Drone That Changed the Nature of Warfare," *The New Yorker*, May 9, 2022, <https://www.newyorker.com/magazine/2022/05/16/the-turkish-drone-that-changed-the-nature-of-warfare>.

<sup>4</sup> Witt, sec. 3.

<sup>5</sup> "Armed with Drones, Turkey Explores African Arms Sales," Agence France-Presse, December 16, 2021, <https://www.france24.com/en/live-news/20211215-armed-with-drones-turkey-explores-african-arms-sales>.

implications of Turkey’s foreign policy expansion and use of drones on U.S. interests in the region.

Ultimately, Turkey is seeking to become a middle power with foreign policy influence that expands across Africa, especially sub-Saharan Africa. It has a unique opportunity to sell drones with a proven history to support these aims.

### C. LITERATURE REVIEW

This review demonstrates the larger currents in Turkish foreign policy before focusing on how Africa, and especially sub-Saharan Africa, plays a role in achieving Turkey’s broader goals. Finally, it synthesizes the rapidly proliferating commentary and literature on Turkey’s sales of drones and how they support Turkey’s foreign policy goals.

According to publicly available Turkish foreign policy, Turkey “aims to protect [Turkey’s] interests in a volatile regional and global environment, while also shaping conditions for sustainable peace and development in [their] neighborhood and beyond.”<sup>6</sup> The mention of shaping conditions beyond their neighborhood, or periphery, merits special attention, and there is a variety of scholarship looking at how Turkish foreign policy has evolved in recent years under the leadership of Turkish President Recep Tayyip Erdoğan.

While Erdoğan has been president since 2014, his ability to influence the direction of Turkish policy dates to 2003, when he first became prime minister. The evidence of his influence in the last two decades has been stark. Eschewing a more liberal orientation, especially within the last decade, Erdoğan has sought to inject Islam as a dominant influence in Turkish politics, and he has moved Turkey away from a dominantly Western orientation toward a more diversified one that features deepening connections in Africa, the Middle East, and Eurasia.<sup>7</sup> In recent years, Turkey has been open to a deepening relationship with Russia, and it has looked to take on a larger and

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<sup>6</sup> Republic of Türkiye Ministry of Foreign Affairs, “Türkiye’s Enterprising and Humanitarian Foreign Policy: A Synopsis.”

<sup>7</sup> Soner Çağaptay, *Erdogan’s Empire* (London: I.B. Tauris, 2021), xv–xvi.

more preemptive role in the security of its periphery, especially in Syria, Iraq, and the Middle East. Moreover, this shift toward non-Western partners and greater autonomy took an even sharper turn after the July 15, 2016, coup attempt in Turkey.<sup>8</sup> Turkey's continued rapprochement with Russia and China, and its willingness to launch interventions often counter to the wishes of allies and Western powers in the Mediterranean and North Africa, have cast it as an increasingly independent actor.<sup>9</sup> Under Erdoğan's leadership, there has clearly been a shift.

Interestingly, though perhaps not surprisingly, official Turkish documents, state-sponsored news agencies, and government-aligned think tanks explain Turkey's shift in foreign policy as a natural response to episodes of encroachment and overstepping from other powers. In other words, Turkey is looking to exert increased agency in international affairs and project influence not only within its immediate periphery, but also on an increasingly regional and even global scale. The Foundation for Political, Economic, and Social Research (commonly known by its Turkish-based acronym, SETA), which is a Turkish state-affiliated think tank, interprets Turkey's global shift as a response to changing regional and global balances of power.<sup>10</sup> Its new strategy features a mix of soft and hard power, the latter of which features consolidation of its defense industry.<sup>11</sup> This suggests that drones sales do play a role in helping Turkey achieve its foreign policy aims.

Turkey's official foreign policy statements also suggest Turkey's shift in foreign policy is due to what it perceives as an international setting "[that] is shaped by the inadequacy of the current global governance mechanisms, fragilities that are increasing globally but especially in our region, rising inequalities, and acceleration of

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<sup>8</sup> Lars Haugom, "Turkish Foreign Policy Under Erdogan: A Change in International Orientation?," *Comparative Strategy* 38, no. 3 (June 2019): 206, <https://doi.org/10.1080/01495933.2019.1606662>.

<sup>9</sup> Kali Robinson, "Turkey's Growing Foreign Policy Ambitions," Council on Foreign Relations, last modified May 19, 2022, <https://www.cfr.org/background/turkeys-growing-foreign-policy-ambitions#chapter-title-0-9>.

<sup>10</sup> Burhanettin Duran, "Accurately Interpreting Turkish Foreign Policy," Foundation for Political, Economic, and Social Research, last modified September 1, 2021, <https://setadc.org/accurately-interpreting-turkish-foreign-policy/>.

<sup>11</sup> Duran.

digitalization.”<sup>12</sup> Its solution is to broaden its engagement with greater outreach: “[Turkey] uses several complementary political, economic, humanitarian, and cultural tools and conducts a diplomacy that thinks globally.”<sup>13</sup> Notably, these official documents indicate that Africa is a focus area for Turkey in executing its broader outreach.

Outside scholars, and other commentators view Turkey’s engagement within Africa through different lenses. Again, government and state-affiliated outlets provide an official or semi-official narrative that looks to establish engagement as a natural occurrence of Turkey’s growing influence in response to outside factors, but there is also a growing body of scholarship that attempts to view the outreach through a different focus. According to The Turkish Ministry of Foreign Affairs, developing relations with the entire African continent is part of a recognition of the growing population, economic potential, and power in international political systems. Furthermore, it cites military cooperation as a component of this newfound engagement.<sup>14</sup> According to another paper from SETA, Turkey looks to increase bilateral engagement with African countries through high level visits, including ones by President Erdoğan, and notably, it uses these visits to “highlight the injustices of Western countries towards the African continent and reiterate [a] call for a more just world.”<sup>15</sup>

Scholarship outside of Turkey typically makes a skeptical analysis towards Turkey’s aims in Africa. In one analysis, two interesting vantage points emerge that may help explain Turkey’s recent activity, especially in the Horn of Africa. The first is an examination of Turkey’s relations with Gulf States and others, like Egypt and Sudan, with ties and interests within the region. After President Bashir was removed from power by the Sudanese army in 2019, Turkey’s relationship with the country vis-à-vis other

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<sup>12</sup> Republic of Türkiye Ministry of Foreign Affairs, “Türkiye’s Enterprising and Humanitarian Foreign Policy: A Synopsis.”

<sup>13</sup> Republic of Türkiye Ministry of Foreign Affairs.

<sup>14</sup> “Turkey-Africa Relations,” Republic of Türkiye Ministry of Foreign Affairs, accessed May 28, 2022, <https://www.mfa.gov.tr/turkey-africa-relations.en.mfa>.

<sup>15</sup> Ibrahim Bachir Abdoulaye and Zainul Abideen Jibril, *Turkey’s Multidimensional Strategy Towards Africa*, SETA Perspective Number 68 (Ankara, Turkey, 2021), 4, <https://setav.org/en/assets/uploads/2021/10/P68.pdf>.

countries in the region changed.<sup>16</sup> Egypt and Gulf States, many of which are Turkey's rivals in the Horn, sought to rapidly offer resources and provide aid to help make the new leadership in Sudan more sympathetic to their interests.<sup>17</sup> Turkey has been sensitive of perceptions of its influence toward Sudan's new and continually evolving leadership, and the relative decline of its influence compared to other states is considered a blow for Turkish impact in the region. Interestingly, however, Turkey's ties to Ethiopia, headlined notably by drone sales, may help in relations and leverage with Egypt and Somalia, that latter of which is home to a large Turkish base.<sup>18</sup>

The Turkish calculus in Ethiopia is slightly different than neighboring countries because Ethiopia is an Orthodox Christian nation.<sup>19</sup> While Turkey has sought to build Turkish schools and mosques to gain influence, it has found much more success in gaining influence through outreach in the commercial and economic sector, and drones may be a significant part of this effort. Improving relations with Ethiopia provides Turkey with leverage against Egypt and its allies. Furthermore, given Ethiopian Prime Minister Abiy Ahmed's assurances of working with Somalia to resolve disputes, Turkey has an opportunity to leverage its improving relations with Ethiopia to enhance its interests in Somalia, where it has its base and provides robust security assistance to Somali forces.<sup>20</sup>

The second vantage point is a look at the domestic politics within Turkey, especially concerning President Erdoğan's intense focus on approval ratings and prospects for reelection in 2023.<sup>21</sup> However, disentangling domestic politics from foreign overtures, especially under Erdoğan, has become more difficult in the last decade.<sup>22</sup>

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<sup>16</sup> Zach Vertin, "Turkey and the New Scramble for Africa: Ottoman Designs or Unfounded Fears?," Brookings, last modified June 25, 2021, <https://www.brookings.edu/research/turkey-and-the-new-scramble-for-africa-ottoman-designs-or-unfounded-fears/>.

<sup>17</sup> Vertin, under "The Zoom Lens: Turkish Engagement in the Horn."

<sup>18</sup> Vertin, under "The Zoom Lens: Turkish Engagement in the Horn."

<sup>19</sup> Vertin, under "The Zoom Lens: Turkish Engagement in the Horn."

<sup>20</sup> Vertin, under "The Zoom Lens: Turkish Engagement in the Horn."

<sup>21</sup> Vertin, under "The Wide-Angle Lens: Foreign Policy or Domestic Politics?."

<sup>22</sup> Vertin, under "The Wide-Angle Lens: Foreign Policy or Domestic Politics?."

Erdoğan has sought to remake domestic institutions into ones more allied with his intent to consolidate power. The reimaging of the parliamentary system into a more centralized version where he has more direct control suggests that foreign policy could also be increasingly driven into the hands of few and most notably directed by Erdoğan himself.<sup>23</sup> The Turkish economy has also struggled under Erdoğan in recent years, and Erdoğan has attempted to recast Turkish foreign policy success and narratives at home to help bolster his political standing amid economic troubles. Within the domestic political realm and from some outsiders, there are often messages of neo-Ottomanism, something which Erdoğan occasionally trumpets. Some analysis shows this message is primarily for domestic political consumption and for the aim of 2023 and beyond.<sup>24</sup>

Combining both perspectives suggests there may be intriguing linkages between Turkey’s drone sales in places like Ethiopia and how they relate to Erdoğan’s domestic political and economic aims. Turkish drone sales may be part of a broader effort to score foreign policy wins that Erdoğan can utilize at home to bolster his support and contribute to supporting domestic firms amid sluggish economic circumstances.

One particularly useful broad source of recent scholarship comes from two Turkish professors, Elem Eyryce Tepeciklioğlu and Ali Onur Tepeciklioğlu. Their book, *Turkey in Africa: A New Emerging Power*, contains chapters by various scholars, all of whom attempt to discern Turkey’s increased engagement within the continent. While it does not specifically address the connection between drones and achieving foreign policy goals in great depth, it serves to provide a rich cross-section of the most recent thinking about Turkey in Africa. Beginning with historical context, it then proceeds into the various economic and military strategies of Turkey within Africa, with one chapter by Brendon J. Cannon concluding that Turkey’s interactions with sub-Saharan Africa, especially in the military context, are recent, largely opportunistic, and ad hoc.<sup>25</sup> Turkey works with a relatively small number of states and does not have a coherent security

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<sup>23</sup> Vertin, under “The Wide-Angle Lens: Foreign Policy or Domestic Politics?”

<sup>24</sup> Vertin, under “The Wide-Angle Lens: Foreign Policy or Domestic Politics?”

<sup>25</sup> Brendon J. Cannon, “Turkey’s Military Strategy in Africa,” in *Turkey in Africa: A New Emerging Power?*, ed. by Elem Eyryce Tepeciklioğlu and Ali Onur Tepeciklioğlu, (Oxfordshire: Routledge, 2022), 133–138.

assistance policy across the sub-continent. Instead of Turkey initiating contact, sub-Saharan African leaders more often reach out to Turkey regarding their internal security matters,<sup>26</sup> though if the demand for Turkish drones and equipment continues to develop, there may be a greater level of outreach from Turkey. Taken together, this coincides with the previous literature and supports the idea that Turkey's discovery and development of a growing drone market may serve to further its political and economic aims as it increases outreach on the sub-continent.

A variety of recent literature and commentary also attempts to frame Turkey's use of drones and diplomacy within a different context. One notable perspective is how Turkish drone sales provide an enduring economic benefit for Turkey. To begin, Turkey's drones are useful to nations not only because of the drones themselves but because of the weapons they can carry. Turkey also makes the MAM-L missile, which is a modified version of the Turkish L-UMTAS anti-tank missile that was specially designed for its drones. According to outside analysis, this missile has been highly effective against tanks, air-defense vehicles, and other light mobile targets.<sup>27</sup> Providing weapons to go along with these drones suggests that enduring relationships may form between Turkey and countries who purchase these drones and have the need to continue purchasing weapons throughout the drone's usable lifespan. Again, Turkey has received excellent publicity from the use of its drones in recent conflicts, and current and future sales will likely "establish Turkey's international role as the maker of high quality, affordable, niche weaponry."<sup>28</sup>

Finally, there is a small body of emerging reports and literature that points to U.S. concern over Turkey's drone sales in sub-Saharan Africa. In late 2021, the U.S. registered complaints over the Turkish drone sales to Ethiopia after evidence emerged

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<sup>26</sup> Cannon, 133.

<sup>27</sup> Charlie Gao, "How Turkey Became a Drone Superpower," *The Reboot* (blog), January 4, 2022, <https://nationalinterest.org/blog/reboot/how-turkey-became-drone-superpower-198938>.

<sup>28</sup> Bredon J. Cannon, "Turkey's Defense Industry and Military Sales in Sub-Saharan Africa: Trends, Rationale, and Results," Trends Research, last modified December 20, 2021, <https://trendsresearch.org/insight/turkeys-defense-industry-and-military-sales-in-sub-saharan-africa-trends-rationale-and-results/>.

that Ethiopia may have used drones and their associated weapons against civilians.<sup>29</sup> This issue highlights one of the potential enduring advantages Turkey has in the region: the willingness to sell drones without critical concern over their use. “Unlike dealing with the U.S., obtaining weapons from Turkey doesn’t involve human-rights oversight,” writes Stephen Witt.<sup>30</sup> As Turkey is able to develop this relationship, partially aided by its willingness to sell with little humanitarian preconditions, it is able to gain leverage over countries in the way it structures its military sales contracts, with two examples being a drone-for-resources deal in Nigeria and one with preconditions for drone delivery to Ethiopia that involved efforts to close Gülenist schools.<sup>31</sup> This also suggests a connection between Turkey’s military sales and an economic rationale. While the literature does not directly address questions of the impact on U.S. interests in the region, these observations invite further inquiry on the subject.

All told, the existing literature points to a Turkey that is looking to expand its foreign influence, and it has selected Africa and even sub-Saharan Africa, as a place to further these aims in concert with broader overtures elsewhere. While Turkey is utilizing both soft and hard forms of influence with varying degrees of depth and success, its sale of drones stands out as an intriguing facet of its effort to increase its influence in the region. It has an ability and willingness to sell inexpensive and capable drones with weapons that are demonstrating real effect in other conflicts, and this is huge boon for Turkey. No other country currently offers the same capability and ease from which to acquire it. There is also some evidence that Turkey may be using drone sales as a part of efforts to bolster its economy and domestic arms companies and as a mechanism to

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<sup>29</sup> Jonathan Spicer, Giulia Paravicini, and Orhan Coskun, “U.S. Concerned Over Turkey’s Drone Sales to Conflict-Hit Ethiopia,” Reuters, last modified December 22, 2021, <https://www.reuters.com/world/africa/exclusive-us-concerned-over-turkeys-drone-sales-conflict-hit-ethiopia-2021-12-22/>.

<sup>30</sup> Witt, “The Turkish Drone That Changed the Nature of Warfare.”

<sup>31</sup> Witt, sec. 3. Gülenist schools are an outreach initiative of the Gülen movement, which is a broad set of religious, social, and educational organizations that were founded by Turkish Islamic Scholar Fetullah Gülen to give a secular education to faithful Muslims. There are hundreds of schools around the world. After the 2016 coup attempt in Turkey, President Erdoğan and the Turkish government accused Fetullah Gülen of fomenting unrest contributing to the coup attempt and began pressuring countries around the world to close their Gülenist schools. For more, see: Paul Alexander, “Turkey on Diplomatic Push to Close Schools Linked to Influential Cleric,” VOA, last modified September 1, 2017, <https://www.voanews.com/a/turkey-erdogan-gulen-schools/4010073.html>.

support particular actors in regional rivalries. As the literature continues to catch up to this emerging trend, it will simultaneously become more important to draw inferences of the effects of this drone diplomacy on U.S. interests in the region.

#### **D. POTENTIAL EXPLANATIONS AND HYPOTHESES**

The currently evolving nature of Turkey's foreign policy, its recent foray into sub-Saharan Africa, and the rapidly developing market for Turkish drones highlights a certain degree of unpredictability in this research. While the course of these issues will likely continue to evolve with new and ongoing efforts, this research nevertheless raises at least three important issues to frame and answer: (1) the motivations of the changing nature of Turkish foreign policy, especially in sub-Saharan Africa; (2) how and why Turkey fills a security assistance role in sub-Saharan Africa with its drone sales; and (3) the effect that Turkey's actions and a shifting security landscape may have on U.S. interests and policy in the region.

The evolution of Turkey's foreign policy in Africa is one part of the larger redesign of Turkish foreign policy under President Erdoğan throughout his tenure in office. After a shift away from Western powers and institutions, Erdoğan has sought to diversify Turkey's relations with foreign powers through outreach to Africa, the Middle East, and Eurasia. This broadening comes, from Turkey's perspective, as a response to changing regional and global balances of power. Part of this diversification is a newfound push for Turkey to increasingly project influence on its own, and it may see a unique opportunity to do so in sub-Saharan Africa.

It would appear, however, that Turkey's motivations across sub-Saharan Africa are varied. Its relations with countries in the Horn of Africa demonstrate that domestic economic and political considerations may play a key role. Additionally, regional relationships and rivalries feature prominently in Turkish relations with countries like Ethiopia. Elsewhere on the sub-continent, Turkey arguably sees an opportunity to take advantage of Africa's rapidly growing population, economies, and influence in international affairs. High-level engagements, often featuring Erdoğan or other senior officials, economic investments, and cultural outreaches all combine to create an

increasingly robust strategy and serve as a powerful mechanism to cement African and Turkish ties.<sup>32</sup> In short, Turkey, and especially Erdoğan, may see increased outreach in sub-Saharan Africa as a method to increase Turkey's clout on the international stage, support domestic and economic issues at home, and, in some cases, manage regional rivalries.

While Turkey's outreach across sub-Saharan Africa is broad, the sale of these drones is an especially important facet to consider. The success of its drones in Azerbaijan, Ukraine, and even Ethiopia demonstrates that Turkey manufactures, and perhaps most importantly, is willing to sell, a relatively inexpensive and capable drone with relatively few preconditions. sub-Saharan African leaders have many internal security challenges, and Turkish drones potentially offer a way for leadership to manage their security issues in a new, effective, and inexpensive manner. If Turkey can parlay these sales into broader influence that supports their aims, as may be the case in Nigeria and Ethiopia, it may lead to broader influence that supports its larger domestic and international political aims.

An interesting corollary of the Turkish drone sales, especially from an African perspective, is that African countries that are purchasing these drones exhibit increased agency and demonstrate that traditional security partners in sub-Saharan Africa, such as Russia, China, and even the U.S., may not always be able to offer solutions to emerging security issues. While the scope of this research focuses primarily on potential effects of Turkish drone sales on U.S. interests and presence in the region, it is nevertheless notable that Turkey's sale of drones marks a willingness to sell increasingly complex and lethal equipment to sub-Saharan countries. While there is currently little evidence to suggest that Turkey's entry into this market will cause the U.S. to drastically alter their relationship with a particular country, it is notable that Turkey is able to extract concessions from countries when offering their drones.<sup>33</sup> The example of Nigeria giving concessions to Turkey within the mineral sector and Ethiopia closing Gülenist schools

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<sup>32</sup> Republic of Türkiye Ministry of Foreign Affairs, "Turkey-Africa Relations."

<sup>33</sup> Witt, "The Turkish Drone That Changed the Nature of Warfare."

may be instructive. If Turkey continues to extract concessions or produce effects that extend closer to U.S. interests, such as increased stability or instability in the region, or the effective elimination of violent extremist organizations, a linkage between the sales and U.S. interests may prominently emerge.

Finally, the effect of Turkey's evolving foreign policy aims on U.S. interests in the region is important. Some security partnerships between the United States and African countries often face obstacles considering a U.S. commitment toward tailoring its assistance with caveats regarding human rights violations. Turkey's willingness to sell drones with little, if any, precondition about their use is important because their increasing utility to alter a battlespace, as evidenced by success in other conflicts, shows that Turkey's drones represent an increasingly influential and desirable tool. Whether or not the United States should alter its posture in conflicts and areas that can benefit from these drones and their associated weapons is an important part of the broader question of examining U.S. interests in the region. Moreover, with the United States providing intelligence, surveillance, and reconnaissance (ISR) support to countries in Africa, a Turkish entrance into this sector may alter whether countries continue to seek U.S. assistance in this area.

## **E. RESEARCH DESIGN**

This thesis examines various source documents to describe the evolution of Turkish foreign policy, the role sub-Saharan African in this evolution, how Turkey leverages drone sales to gain influence in sub-Saharan Africa and support efforts within Turkey, and what the implications are for the broader security environment in sub-Saharan Africa, especially from a U.S. perspective. As the existing literature indicates, there are varying degrees of substantive information on each of these aims. This research synthesizes these documents and examines drone sales-cases within sub-Saharan Africa to explain the recent trend of Turkish drone diplomacy.

To answer the question of how Turkish foreign policy has developed and the role of sub-Saharan Africa in this transformation, I take inventory of official, semi-official, and scholarly documents. Existing documents and statements from Turkish government

and semi-official policy institutes provide a baseline to establish Turkish aims in sub-Saharan Africa, and outside scholarship serves to refine and provide context for these Turkish efforts. As the literature suggests, there are linkages between the foreign policy and domestic factors, and documents from a variety of sources illustrate a holistic picture of these ties.

Answering the second aspect of this research question requires looking at cases where Turkey has sold drones within sub-Saharan Africa. Ethiopia features prominently, but emerging cases in areas like Niger and Nigeria provide clues about the potential for future development in the sub-continent. Given the nascent and ongoing nature of these efforts, early reports and arms transfer data from resources like the Stockholm International Peace Research Institute (SIPRI), as well as quick reaction analysis to ongoing conflict, especially Ethiopia, are important. They provide a foundation from which to explain how Turkey's drone products fill a security need for sub-Saharan African countries given their unique capabilities and price point, and they answer how Turkey enhances its own influence and receive benefit in turn.

Answering how Turkey's drone diplomacy affects U.S. interests in the region requires examining documents that capture the extent of U.S. strategy, security assistance, and cooperation efforts in countries that Turkish drone sales affect. Moreover, it requires a comparison of any terms that a purchasing country agrees to and whether there are second or third order effects that begin to overlap with U.S. interests in the region. Therefore, answering this question requires a combination of case study and a survey of broader policy documents. Ethiopia currently plays a prominent role in framing and answering this question, but as the security landscape continues to change across sub-Saharan Africa, other relationships will likely gain prominence.

## **F. THESIS OVERVIEW AND CHAPTER OUTLINE**

Following Chapter I, the introduction and literature review, Chapter II explores the evolution of Turkish foreign policy and how sub-Saharan Africa has come to play a role within Turkey's modern foreign policy. Chapter III analyzes the evolution of the Turkish drone program. After a broad overview on its origins and prominent drone

products, the chapter examines where Turkey has sold its drones, how customers have deployed the drones, and the prospects for future sales in sub-Saharan Africa. This demonstrates the extent and reach of Turkish drone sales and how these agreements are furthering Turkish foreign policy objectives. Chapter IV explores the implications of the changing security landscape in sub-Saharan Africa and how American interests and influence are affected by this change in addition to Turkey's drone sales throughout the region. Chapter V concludes and explores additional lines of research.

## II. TURKISH FOREIGN POLICY: EVOLUTIONS AND PROGRESS IN SUB-SAHARAN AFRICA

### A. INTRODUCTION

Turkish foreign policy has evolved over the last 20 years, especially under the leadership of Turkish President Recep Tayyip Erdoğan. Erdoğan's Turkey has ambitions to project influence from beyond its near periphery and establish itself as a dependable partner and alternative to traditional partners, especially from the West.<sup>34</sup> While this expansion first began in areas where Turkey had historical roots, such as North Africa, Turkey has sought to expand its influence even further. Today, Turkey is increasingly active in diplomatic, business, and security relations with sub-Saharan Africa.

To ultimately understand where drone sales fit into Turkey's effort to establish, maintain, and increase influence, it is vital to understand the progression of Turkey's expansion into sub-Saharan Africa. This section seeks to develop the narrative that Turkey's expansion into sub-Saharan Africa has been deliberate, though its overall implementation has been uneven to date. There are a variety of factors that drive this expansion, including domestic concerns within Turkey, the continued development of the Turkish economy, and the desire to demonstrate agency and project power internationally. Despite the varied nature of this expansion, Turkey's drone sales seem to play an increasing role in relationships with a growing list of countries, and it may become a tool for Turkey to develop relations in the future further. While the depth of Turkey's drone sales is covered in the next chapter, the development of Turkey's foreign policy in sub-Saharan Africa plays a crucial role in uncovering why Turkey has been able to capitalize on this expanding niche market.

This chapter proceeds as follows. It begins by briefly examining modern Turkish foreign policy and what it means for Turkey to seek influence globally. It also examines the end state of seeking this influence and how this relatively new foreign policy serves Turkey's domestic political and economic interests. Next, the role of sub-Saharan Africa

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<sup>34</sup> Republic of Türkiye Ministry of Foreign Affairs, "Türkiye's Enterprising and Humanitarian Foreign Policy: A Synopsis."

within Turkish foreign policy helps explain the extent of Turkey's involvement across the sub-continent and the trajectory of its outreach within the preceding decades. The combined narrative shows that Turkey's security assistance within sub-Saharan Africa is part of a broader, if slightly disjointed, effort and that it has found a niche within the drone sales industry.

## **B. BRIEF EVOLUTION OF TURKISH FOREIGN POLICY UNDER ERDOĞAN TO THE PRESENT**

Since Erdoğan and the Justice and Development Party (commonly known as the AKP, based on its Turkish name) came into power in the early 2000s, there has been a notable shift in Turkish foreign policy. Turkey has generally transitioned from a focus on integrating with Western powers and institutions toward exerting increased independent agency and seeking influence within its local region and increasingly, beyond. This section explores modern Turkish foreign policy by looking for what it means for Turkey to want influence, especially on a global level, and how this end-state combines with domestic economic and political concerns, such as Erdoğan's grasp on power within the AKP and the country at-large.

Prior to the AKP and Erdoğan coming to power, Turkish foreign policy regarded areas in the former Ottoman empire with less significance. The AKP quickly changed foreign policy direction, however, and began to draw on historical and economic connections in boasting a "strategic depth" within this area to bolster influence.<sup>35</sup> The "strategic depth" label and much of the shift it captures came from the influence of Ahmet Davutoğlu, a senior foreign policy advisor to Erdoğan during his time as Prime Minister. Erdoğan, Davutoğlu, and the AKP came to believe that Turkey's geographical region was increasingly important to global geopolitics, and they sought to exert more influence throughout the region to establish Turkey's stature as an emergent global power.<sup>36</sup> There was a fear within Ankara and the AKP that a spread of western influence in Turkey's near-abroad in areas like the Balkans and the Middle East would be

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<sup>35</sup> Aaron Stein, "Turkey's New Foreign Policy: Davutoglu, the AKP and the Pursuit of Regional Order," *Whitehall Paper* 83, (2014): 2.

<sup>36</sup> Stein, 2.

detrimental to Turkey's interests as it attempted to grow. This "strategic depth" policy also came to be characterized with the label "zero problems with neighbors."<sup>37</sup> By its design, these relationships would ostensibly highlight shared history, common cultural traits, and an overall increase in trade where possible.<sup>38</sup> The policy and notion of neutrality began to face challenges during the Arab Spring when Turkey was forced to choose between competing factions in countries in its near-abroad.

Simultaneously, Turkey's foreign policy continued to develop further under President Erdoğan. Erdoğan has sought to balance Turkey from an overarching reliance on Western partners and institutions with, and he prioritized autonomy and new outreach to Africa, parts of the Middle East, and Eurasia to achieve this aim. From Turkey's perspective, this shift was a response to changing regional and global balances of power, and the ultimate goal has been a newfound push for Turkey to independently project power beyond its near periphery. Moreover, drawing on the legacy of Mustafa Kemal Atatürk, Erdoğan has sought to project the image of a leader intent on restoring the prestige and power of a middling Turkey, much like Atatürk received credit for when he established the Republic of Turkey a century earlier.<sup>39</sup> This rebranding has accompanied a considerable consolidation of power and influence under Erdoğan, and one of the significant consequences was the evolution of Turkish foreign policy.

Under this evolved foreign policy, Turkey has sought to become an influential state on a global level. Whereas Turkey in the early 2000s had been focused on interdependence among international partners and a willingness to be a neutral mediator, it began shifting its focus in the 2010s, especially after the Arab Spring. Turkey yearned for greater autonomy, and with that came a greater degree of military interventionism and diplomatic coercion.<sup>40</sup> Turkey abandoned its previous neutrality in regional conflicts by

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<sup>37</sup> Stein, 2.

<sup>38</sup> Stein, 2.

<sup>39</sup> Dimitar Bechev, *Turkey Under Erdoğan: How a Country Tuned From Democracy and the West* (New Haven: Yale University Press, 2022), 137–138.

<sup>40</sup> Mustafa Kutlay and Ziya Öniş, "Turkish Foreign Policy in a Post-Western Order: Strategic Autonomy or New Forms of Dependence?," *International Affairs* 97, no. 4 (2021): 1085, <https://doi.org/10.1093/ia/iiab094>.

becoming involved in the Syrian civil war, and its relationships with Israel and Egypt dropped sharply. The change in relationships with these states showed a marked decline from the early 2000s when Turkey sought warm ties with all in the image of interdependence and neutrality.<sup>41</sup> The decline in relationships was not limited to its near periphery, either. For instance, Turkey sought to cultivate strong relationships with countries like Russia, and one of the first heads of state to visit Turkey after Erdoğan's presidential election was Vladimir Putin.<sup>42</sup> In addition, Turkey's relationship with the United States, Western partners, and institutions like North Atlantic Treaty Organization (NATO) continued to decline as tensions over regional security issues, like the 2020 Second Libyan Civil War, continued to mount.<sup>43</sup> Tensions also included disagreements over weapons procurement, with the Turkish purchase of the Russia's S-400 creating an especially contentious debate.

This foreign policy, and the use of military troops and arms, also serves to bolster domestic political concerns, and this linkage provides context for explaining Turkey's new outreach. Since the 2015 elections and the 2016 coup attempt, some argue that Turkey's military activism, deployment of troops, and sale of hardware is directly tied to elections and the survival of Turkey's political elite within the AKP.<sup>44</sup> In this time, Turkey has intervened in Syria, deployed Turkish troops abroad, especially to Somalia, and has generally gone further in its attempts to coerce actors like Cyprus, Qatar, Greece, Egypt, and Israel. These actions tend to tap into nationalist sentiment within Turkey and distract from other issues that damage the Turkish political elite, like middling economic performance or the presence of millions of Syrian refugees.<sup>45</sup> While Turkey's actions in North Africa fall into this pattern given its deployment of troops to Libya, there is somewhat less of a connection with sub-Saharan Africa. Turkey's relationship with

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<sup>41</sup> Kutlay and Öniş, 1085.

<sup>42</sup> Bechev, *Turkey Under Erdoğan: How a Country Tuned From Democracy and the West*, 137.

<sup>43</sup> Kutlay and Öniş, "Turkish Foreign Policy in a Post-Western Order: Strategic Autonomy or New Forms of Dependence?," 1086.

<sup>44</sup> Mehtap Kara, "Linking Turkey's Domestic Politics and Foreign Policy: the Justice and Development Party's Political Strategies and Their Divergent Foreign Policy Efforts," *Turkish Studies* 23, no. 4 (April 2022): 531, <https://doi.org/10.1080/14683849.2022.2060082>.

<sup>45</sup> Kara, 530.

Somalia is robust and its support of Ethiopia is sure to bolster its position against Egypt, but there are fewer concrete connections farther south and west within sub-Saharan Africa.

The linkage between the economy and the political survival of Turkey's elite is also relevant. Economic problems have been one of the leading issues for the AKP. The Turkish lira lost significant value between 2018 and 2021, foreign direct investment (FDI) fell sharply, and economic growth generally stagnated.<sup>46</sup> Erdoğan and the AKP have weakened institutions, allowed for the rule of law to decline, and implemented a monetary policy that has led to the retrenchment of FDI.<sup>47</sup> In an attempt to bolster domestic support despite these troubles, Erdoğan casts the issues as stemming from interactions with the West. Therefore, the pivot away from the West allows Erdoğan to exploit nationalist sentiment and enables more military interventionism.<sup>48</sup>

While Erdoğan and Turkey have shown a willingness to use foreign policy and actions to achieve domestic aims, their increasing presence in sub-Saharan Africa is relatively new and noteworthy. Turkey's traditional sphere of influence within Africa has typically been across North Africa. Despite this, Erdoğan has made several trips south of the Sahara, and he consistently engages with sub-Saharan African heads of state in bilateral and multilateral settings. This level of interest and personal engagement likely signals a nascent importance for sub-Saharan Africa in bolster Turkish interests. Concurrently, Turkey's efforts across the continent are growing increasingly robust. The next section explains that although there may not yet be an entirely coherent pattern to the engagement, Turkey is clearly interested in broadening its outreach and seeking influence within the region.

### **C. AN OPENING ACROSS AFRICA**

When Turkey began a period of rapprochement with Middle East countries at the end of the 2000s due to increased tensions from EU and westward-leaning relationships,

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<sup>46</sup> Kara, 543.

<sup>47</sup> Kara, 543.

<sup>48</sup> Kara, 543.

especially regarding the drawn-out EU membership process, it also began to look south toward Africa.<sup>49</sup> It largely found a willing partner in the region. The notion that Turkey could be a donor and provide humanitarian benefit in an alternative order to the more traditional UN-backed and Western-led system found a certain resonance within African countries.<sup>50</sup> Turkey's increased involvement across the continent was not merely altruistic, however. Trade and new opportunities for Turkish companies were also important factors for Turkey's outreach across the region.<sup>51</sup> Turkey's engagement in the region also represents an opportunity to exercise agency and increase influence beyond its near-abroad, and there are also small, but growing, commercial and business interests across the spectrum of the engagement.

As Turkish foreign policy began to shift and sub-Saharan Africa emerged as a focus area within new direction, interestingly, was supported by non-state actors like the business groups and segments of civil society.<sup>52</sup> The intersection of interests and action between Turkey's government and its non-state actors is another crucial element to understanding why sub-Saharan Africa has the potential to continue its growth as an important region for Turkey. Moreover, it provides an avenue to understand why Turkey's outreach simultaneously establishes influence within Africa while also serving domestic Turkish interests. While today's level of engagement and the recent growth is noteworthy, there is also a history of Turkish engagement in the region that dates to the end of the twentieth century.

In 1998 and 2003, Turkey released a plan that outlined strategies to develop an economic relationship with Africa.<sup>53</sup> While the initial plan focused on economic ties, its

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<sup>49</sup> Elem Eyryce Tepeciklioğlu and Ali Onur Tepeciklioğlu, "Contextualizing Turkey's Africa Policy," in *Turkey in Africa: A New Emerging Power?*, ed. by Elem Eyryce Tepeciklioğlu and Ali Onur Tepeciklioğlu (Oxfordshire: Routledge, 2022), 4–5.

<sup>50</sup> Tepeciklioğlu and Tepeciklioğlu, 4–5.

<sup>51</sup> Tepeciklioğlu and Tepeciklioğlu, 5.

<sup>52</sup> Volkan İpek and Conca Biltekin, "Turkey's Foreign Policy Implementation in Sub-Saharan Africa: A Post-International Approach," *New Perspectives on Turkey* 49, (September 2013): 128–129, <https://doi.org/10.1017/S0896634600002065/>.

<sup>53</sup> İpek and Biltekin, 128–129.

second iteration in 2003 focused on a triad of cultural, economic, and political ties.<sup>54</sup> Turkish businesses and Gülenist schools were some of the early entrants across the continent, and official diplomatic activity followed soon after.<sup>55</sup> After the 2016 coup and the split from Gülen, much of the focus consisted of ridding Africa of ties to Gülenist schools. Erdoğan took a personal interest in the phase of development, and his travels often centered around personal advocacy in these countries to close their schools.<sup>56</sup> Turkish firms also supported this effort. For instance, Ethiopia received Turkish drones after its government seized many Gülenist schools.<sup>57</sup>

Whereas Turkey often enjoyed a tepid reception in many of its near-abroad neighboring countries, especially in the Balkans and the Middle East, its reception in Africa was often quite favorable.<sup>58</sup> During efforts to build and solidify diplomatic and commercial relations, Turkey and Erdoğan made efforts to exploit Turkey's lack of colonial or imperial history, with Erdoğan reportedly saying on a trip to Zambia that Turkey was “not going to Africa to take their gold and natural resources as Westerners have done in the past” and that Turkey wished to pursue “solid and sustainable partnership [s] based on mutual benefits.”<sup>59</sup> Religion, the sharing of skills and ideas, and cultural assimilation seem to play a role, too, especially in the Horn of Africa. For example, an Ethiopian resident highlighted the proclivity of Turkish workers to fit into the Ethiopian community when working on projects like railway lines: “The Turkish workers know how to live and work with the local community, and we have a similar culture.”<sup>60</sup> A local engineer also commented that Turkish engineer were unique

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<sup>54</sup> Abdoulaye and Jibril, *Turkey's Multidimensional Strategy Towards Africa*, 1–2.

<sup>55</sup> Bechev, *Turkey Under Erdoğan: How a Country Tuned From Democracy and the West*, 180.

<sup>56</sup> Bechev, 180.

<sup>57</sup> Witt, “The Turkish Drone That Changed the Nature of Warfare.”

<sup>58</sup> Bechev, *Turkey Under Erdoğan: How a Country Tuned From Democracy and the West*, 180.

<sup>59</sup> Bechev, 180.

<sup>60</sup> Anadolu Agency, “Turkish Construction Giant Eyes More Africa Projects After Ethiopia, Tanzania Railways,” *Daily Sabah*, last modified August 2, 2017, <https://www.dailysabah.com/economy/2017/08/02/turkish-construction-giant-eyes-more-africa-projects-after-ethiopia-tanzania-railways>.

compared to other countries he had worked with on infrastructure projects in that they were willing to transfer their skills and not compromise on the quality of the project.<sup>61</sup>

Continuing the initial investments and goodwill built within Africa from earlier efforts also look to be part of Erdoğan's and Turkey's strategy to shore up economic performance and improve prospects for the 2023 election. While relatively modest in terms of absolute numbers, Africa is seen as a potential market in which to grow to alleviate domestic concerns over the state of the Turkish economy. In late November 2021, Erdoğan declared that "We have moved to a new economic model. We will achieve production based on economic growth. We will lure foreign investors. This is how the Chinese economy has grown."<sup>62</sup> It appears that Erdoğan has used high-level meetings and visits with African leaders to expand Turkey's connections and volume of economic activity within Africa. In the most recent Turkey-Africa summit, over fifteen leaders visited Istanbul to discuss further ties between Africa and Turkey. Tellingly, the attendees included the Ghanaian president Nana Akufo-Addo, chair of the Economic Community of West African States (ECOWAS), and Senegalese president Macky Sall, the chair of the African Union.<sup>63</sup>

While this diplomatic and commercial outreach established a baseline for Turkey across sub-Saharan Africa, the security assistance that Turkey provides various countries in sub-Saharan Africa may be a key to its strategy moving forward. Turkey has a limited history of selling military hardware to African countries, but the level of sales has increased within the last decade. Turkey's recent outreach across the diplomatic, commercial, and military spectrums has increased, and taken together, it helps explain how Turkey is building a larger security assistance presence within the region.

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<sup>61</sup> Anadolu Agency.

<sup>62</sup> Işın Eliçin, "How Turkey Plans to Ramp Up its Engagement with Africa," *International Politics and Society*, last modified December 15, 2021, <https://www.ips-journal.eu/topics/economy-and-ecology/how-turkey-plans-to-ramp-up-its-engagement-with-africa-5610/>.

<sup>63</sup> Nosmot Gbadamosi, "Turkey Deepens its Footprint in Africa," *Foreign Policy*, last modified December 22, 2021, <https://foreignpolicy.com/2021/12/22/turkey-africa-erdogan-partnership-summit/>.

#### D. TURKEY'S RECENT OUTREACH IN SUB-SAHARAN AFRICA

Turkey's recent outreach across sub-Saharan Africa spans across the continent. With a range of commercial and business ventures, military involvement in Somalia, and security assistance, especially featuring drone sales, across the continent, Turkey is rapidly expanding its footprint. While some of this outreach may appear unevenly spread throughout the continent, when taken together, it demonstrates Turkey's ambitions to be an alternate partner of choice in the region. So far, this expansion has helped establish its foreign policy while simultaneously supporting domestic political and economic interests.

Perhaps one of the most visible markers of increased Turkish presence across the continent is the proliferation of airline routes between Turkey and various African partners via Turkish airlines. In 2011, Turkish airlines counted 14 routes across the continent. By the end of 2017, the number had grown to over 50 while other airlines simultaneously reduced service or eliminated some routes.<sup>64</sup> As of 2022, Turkish Airlines flies to 62 cities across 41 African countries, and it boasts that it is "the airline from outside the continent that flies to the most destinations in Africa."<sup>65</sup> Turkey's leaders and business community envisaged this growth from the start. Erdoğan viewed Turkish airlines an excellent way to facilitate Turkey's entrance across the continent and sustain increased outreach. Moreover, former CEO of Turkish Airlines, Temel Kotil, viewed Turkish Airlines as Turkey's largest global brand, with a goal of becoming a significant airline globally.<sup>66</sup>

It appears that increased airline routes and other measures have coincided with an increased number of commercial connections and trade across the continent. In 2021,

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<sup>64</sup> Maggie Fick, "Turkish Airlines Profits in Africa, Where Others Fear to Fly," Reuters, last modified September 12, 2017, <https://www.reuters.com/article/us-turkishairlines-africa/turkish-airlines-profits-in-africa-where-others-fear-to-fly-idUSKCN1BN1CZ>.

<sup>65</sup> "In Numbers," Turkish Airlines, May 27, 2022, <https://www.turkishairlines.com/en-int/press-room/about-us/turkish-airlines-in-numbers/>; Nelly Fualdes, "Africa: Why Turkish Airlines is Betting on Widebody Aircraft on the Continent," The Africa Report, last modified November 4, 2022, <https://www.theafricareport.com/256191/africa-why-turkish-airlines-is-betting-on-wide-body-aircraft-on-the-continent/>.

<sup>66</sup> Orçun Selçuk, "Turkish Airlines as a Source of Soft Power in Africa," in *Turkey in Africa: A New Emerging Power?*, ed. Elem Eyrice Tepeciklioğlu and Ali Onur Tepeciklioğlu (Oxfordshire: Routledge, 2022), 221.

Turkey conducted \$29 billion in trade with the entire continent, with \$11 billion coming from sub-Saharan Africa. When compared to 2003, this represents a nearly eight-fold increase.<sup>67</sup> In addition to commercial ventures, Turkey has also increased its construction activity across the continent, with notable projects including mosques, stadiums, and airports.<sup>68</sup> Its activities seem to mirror many of China's efforts, and in 2021, Tanzania awarded a Turkish company a \$1.9 billion contract to construct a new railway line.<sup>69</sup> In fact, sub-Saharan Africa accounted for approximately 17 percent of Turkish construction business volume in 2021.<sup>70</sup> Finally, Turkey has established joint Business Councils in over 45 countries across the continent that serve as local executors of Turkish business interests.<sup>71</sup>

It is important, however, to put some of this economic growth and overall level of activity in context. The activity, when compared to levels in previous years, clearly shows substantial growth. When compared to other regions, though, it suddenly appears far more moderate. In 2018, Africa's share of Turkey's total exports was approximately 8.6 percent, with approximately one-third coming from sub-Saharan Africa. Moreover, Turkey's imports from Africa accounted for just 3.2 percent of the country's total imports, with sub-Saharan Africa also accounting for roughly one-third of that amount.<sup>72</sup> In 2020, sub-Saharan Africa's top five export and import partners were China (12.68%), India (5.65%), South Africa (5.22%), U.S. (5.1%), and Switzerland (5.09%).<sup>73</sup>

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<sup>67</sup> "Turkey is Making a Big Diplomatic and Corporate Push into Africa," *The Economist*, April 23, 2022. <https://www.economist.com/middle-east-and-africa/2022/04/23/turkey-is-making-a-big-diplomatic-and-corporate-push-into-africa>.

<sup>68</sup> *The Economist*, "Turkey is Making a Big Diplomatic and Corporate Push into Africa."

<sup>69</sup> *The Economist*, "Turkey is Making a Big Diplomatic and Corporate Push into Africa."

<sup>70</sup> John Calabrese, "Building in Africa: Turkey's 'Third Way' in China's Shadow," Middle East Institute, last modified June 21, 2022, <https://www.mei.edu/publications/building-africa-turkeys-third-way-chinas-shadow>.

<sup>71</sup> Republic of Türkiye Ministry of Foreign Affairs, "Turkey-Africa Relations."

<sup>72</sup> Samiratou Dipama and Emel Parlar Dal, "Interplay Between Identity and Trade in Turkey-Africa Relations," in *Turkey in Africa: A New Emerging Power?*, ed. Elem Eyryce Tepeciklioğlu and Ali Onur Tepeciklioğlu (Oxfordshire: Routledge, 2022), 116.

<sup>73</sup> "Sub-Saharan Africa Trade," World Integrated Trade Solution, accessed February 2, 2023, <https://wits.worldbank.org/countrysnapshot/en/SSF>.

This context shows that Africa represents a growing segment of the foreign Turkish economic and development portfolio, but it also illuminates that there is a gap between North Africa and sub-Saharan Africa. While official Turkish sources and some media continue to trumpet the narrative that Turkey is expanding within sub-Saharan Africa, the level of trade and investment still pales in comparison to other nations. Put another way, there seems to be an appetite for continued Turkish growth in the region, but the realization of this appetite and its execution have not yet emerged on a level comparable to other nations. The trajectory suggests this is possible, but there is still a gap between the discourse and the actual execution.<sup>74</sup>

Turkey's military assistance across the continent is also increasingly robust. Similar to the economic picture, however, is the narrative that the execution has been relatively uneven, especially in sub-Saharan Africa, and in terms of absolute numbers, Turkey's assistance has been relatively small. Broadly speaking, Turkey has generally been active in areas where security outcomes are likely to affect their interests.<sup>75</sup> Therefore, much of its assistance has been tailored to North Africa in places like Libya, Tunisia, and Egypt.

This military assistance is a relatively new phenomenon, too. Arms were generally never offered abroad until the early 2010s, and a notable uptick occurred after the July 2016 coup attempt in Turkey. Erdoğan endeavored to break Turkey's reliance on imported weapons, and he used his wide-sweeping authority to bring the domestic Turkish arms industry under his control and increase funding. For instance, the Turkish Armed Forces Foundation (TSKGV) now reports to Erdoğan instead of the defense minister, and notably, the TSKGV owns majority shares in many top-tier defense companies.<sup>76</sup> In addition, Turkey's defense-related exports to Africa totaled \$460.6 million in 2021, a number that more than quadrupled over the previous year.<sup>77</sup>

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<sup>74</sup> Dipama and Parlar Dal, "Interplay Between Identity and Trade in Turkey-Africa Relations," 122.

<sup>75</sup> Cannon, "Turkey's Military Strategy in Africa," 129.

<sup>76</sup> Cannon, 129.

<sup>77</sup> Nebahat Tanrıverdi Yaşar, *Unpacking Turkey's Security Footprint in Africa: Trends and Implications for the EU*, SWP Comment 42 (Berlin, Germany: Stiftung Wissenschaft und Politik, 2022), 2, [https://www.swp-berlin.org/publications/products/comments/2022C42\\_Turkey\\_Security\\_Africa.pdf](https://www.swp-berlin.org/publications/products/comments/2022C42_Turkey_Security_Africa.pdf).

A special case involves Turkey's involvement in Somalia. Within the last five years, Turkey has invested heavily in the country at a time when other countries showed little interest. Moreover, Turkey's involvement features different levers of Erdoğan's government, which illustrates how Turkey uses its foreign policy wholistically while simultaneously featuring Erdoğan's personal involvement and imprint. Mogadishu now features a new hospital named after Erdoğan. A Turkish company runs a hotel and the international airport, where Turkish Airlines offers a daily route to Istanbul.<sup>78</sup> In addition, Turkish firms with funding from Turkey's development agency have repaired Somalia's parliament building and undertaken other infrastructure projects, including repairs to roads.<sup>79</sup> Turkish military officers and trainers have developed over 5,000 Somalian commandos and police forces.<sup>80</sup> This broad Turkish effort began with a personal visit from Erdoğan in 2011, which represented the first visit to Somalia by a non-African leader in over 20 years.<sup>81</sup>

In the near future, it appears that Turkey looks to continue to increase arms sales in sub-Saharan Africa while continuing an aversion to becoming directly involved in conflicts.<sup>82</sup> Turkey has signed various military pacts with Senegal, Nigeria, and Togo, and it prioritizes prior military experience when assigning Ambassadors to African nations.<sup>83</sup> The partnership between Turkey and African countries, while still modest compared in terms of absolute value compared to the continent's traditional security partners like China, Russia, and the United States, shows no signs of abating. The drastic increase in arms exports may stem from Turkey's general attitude towards arms sales. An anonymous Turkish official in Ankara was quoted as saying, "We do not dictate, and we do not tell anyone what to do."<sup>84</sup> In other words, Turkey wishes to publicize the image

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<sup>78</sup> *The Economist*, "Turkey is Making a Big Diplomatic and Corporate Push into Africa."

<sup>79</sup> *The Economist*, "Turkey is Making a Big Diplomatic and Corporate Push into Africa."

<sup>80</sup> *The Economist*, "Turkey is Making a Big Diplomatic and Corporate Push into Africa."

<sup>81</sup> *The Economist*, "Turkey is Making a Big Diplomatic and Corporate Push into Africa."

<sup>82</sup> *The Economist*, "Turkey is Making a Big Diplomatic and Corporate Push into Africa."

<sup>83</sup> *The Economist*, "Turkey is Making a Big Diplomatic and Corporate Push into Africa."

<sup>84</sup> *The Economist*, "Turkey is Making a Big Diplomatic and Corporate Push into Africa."

of easy sales, although they have tied security assistance to the removal of Gülenist schools in the past. Moreover, Mohamed Abdullahi Mohamed, Somalia's president, used his Turkish-trained forces against his rivals after his presidential term expired, and Ethiopia used Turkish drones in its civil war, with some reports indicating that civilians may have been killed. Despite these uses, Turkey has remained largely silent on the subject and continues to provide resources and support.<sup>85</sup>

The Ethiopian case study is instrumental in demonstrating Turkey's involvement in sub-Saharan Africa. Buoyed by the success of its drones here, North Africa, and elsewhere off the continent, Turkey has found many sub-Saharan African partners are increasingly requesting information about its domestically produced drones. After a 2021 trip to Africa, Erdoğan stated that, "Wherever we went, they asked us for unarmed and armed drones."<sup>86</sup> While outreach continues in the broad category of security assistance across sub-Saharan Africa, Turkey's most visible export is quickly becoming its domestically produced drones, especially the Bayraktar TB2.<sup>87</sup> In other words, Turkey has found a niche market with its drone sales. Interest among sub-Saharan African nations in purchasing these drones has increased, especially as previous buyers, like Ukraine, Azerbaijan, and Ethiopia demonstrate their capability.

The uptick in security assistance and increasingly widespread sale of drones across sub-Saharan Africa shows the continued progression of Turkey's outreach across the region. The Ethiopian case and others also show how Turkey is using these partnerships in sub-Saharan Africa to bolster its interests domestically and abroad. Moreover, it represents the latest step of an evolving foreign policy under the AKP and Erdoğan. The following chapter looks specifically at Turkey's drones, its related

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<sup>85</sup> *The Economist*, "Turkey is Making a Big Diplomatic and Corporate Push into Africa."

<sup>86</sup> *The Economist*, "Turkey is Making a Big Diplomatic and Corporate Push into Africa."

<sup>87</sup> Turkey also markets other products across the continent. These items include mine clearance vehicles, rifles, ISR systems, armored vehicles, and other sensor systems. For more information about Turkey's assistance across Sub-Saharan Africa, see Nebahat Tanrıverdi Yaşar's work for Stiftung Wissenschaft und Politik (SWP) at [https://www.swp-berlin.org/publications/products/comments/2022C42\\_Turkey\\_Security\\_Africa.pdf](https://www.swp-berlin.org/publications/products/comments/2022C42_Turkey_Security_Africa.pdf).

diplomacy across the African subcontinent, how and why these sales are advancing Turkey's aim of increasing influence, and the benefit that purchasing nations receive.

### III. DRONES: TURKEY’S MOST RECOGNIZED EXPORT

#### A. INTRODUCTION

Turkish drones have received considerable attention in the press over the last few years due to their appearance in various conflicts. In 2020, Azerbaijan used Turkish Baykar Bayraktar TB2 drones against Armenia in the Nagorno-Karabakh war. Turkey’s TB2 also received considerable attention for its use by Ukraine in the opening months of the conflict with Russia.<sup>88</sup> Moreover, the TB2 also received coverage for its use by the Ethiopians in their war against Tigray rebels. Given this extensive coverage and the willingness of Turkey’s government and media to publicize its most recognizable drone, robust demand for the TB2 continues nearly unabated. As Erdoğan stated after one of his trips to sub-Saharan Africa, countries consistently ask about Turkish drones.<sup>89</sup>

While the TB2 and other Turkish drones have shown their effectiveness on the battlefield, their production and sale benefit not only their manufacturer, Baykar, but also the Turkish government by creating positive publicity, enduring relationships with other countries, and a mechanism to extract concessions from purchasing countries. As a result, Turkish drone sales do more than enable Turkey’s increasingly ambitious foreign policy across sub-Saharan Africa. In addition, they serve as essential enablers and guarantors of the domestic Turkish regime.

This chapter explores the history of Turkey’s drone program, highlights its most recognizable drone export, the TB2, and draws connections between Selçuk Bayraktar, the face of Baykar, and the Turkish government. In addition, it demonstrates how Turkey advances its aims in selling these drones by examining its sales process and the media narrative that Turkey creates. The final sections examine the relatively early cases of

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<sup>88</sup> Dave Philipps and Eric Schmitt, “Over Ukraine, Lumbering Turkish-Made Drones Are an Ominous Sign for Russia,” *The New York Times*, last modified March 11, 2022, <https://www.nytimes.com/2022/03/11/us/politics/ukraine-military-drones-russia.html>; Isabelle Khurshudyan and David L. Stern, “Why Ukraine’s Turkish-Made Drone Became a Flash Point in Tensions with Russia,” *The Washington Post*, last modified January 15, 2022, <https://www.washingtonpost.com/world/2022/01/15/ukraine-russia-drones-turkey/>.

<sup>89</sup> The Economist, “Turkey is Making a Big Diplomatic and Corporate Push into Africa.”

Ethiopia and Nigeria in detail, along with other cases containing a smaller footprint or that are in earlier stages of finalization, like Somalia, Niger, Togo, Burkina Faso, and Angola. They also begin to demonstrate why these sub-Saharan countries chose Turkey to purchase drones and the benefit they receive from their purchase, both related to the drone and other facets of their agreement with Turkey.

## **B. TURKISH DRONES: HISTORY, CAPABILITY, AND PROCUREMENT**

The Turkish company that manufactures the Bayraktar TB2, Baykar, was founded in 1986 and was initially envisioned as a supplier for Turkey’s automotive industry.<sup>90</sup> Today, it claims to be Turkey’s leading UAV company with an additional focus on artificial intelligence (AI).<sup>91</sup> What happened between these events shows how a confluence of circumstances drove Turkey, and one man in particular, to lead the development of indigenously produced drones.

In the early 2000s, Turkey looked abroad to obtain drones.<sup>92</sup> It initially sought a suitable product from the U.S., but Turkey’s insistence on including its domestically sourced optical hardware prevented the completion of any agreement.<sup>93</sup> Turkey pivoted to Israeli drones, but when Turkey’s camera proved too heavy for Israel’s available drone, it pivoted to leasing other Israeli drones. However, as Turkey used these drones operationally, it discovered that their capacity and ability to fulfill the desired mission were insufficient.<sup>94</sup> When the U.S. also refused to provide the Predator drone in an armed configuration acceptable to Turkey, Turkey realized that its only option was to domestically produce a drone that could meet all its desired capabilities.<sup>95</sup> At the time, Turkish Aerospace Industries was developing its own Anka drone. However, Turkey’s

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<sup>90</sup> “We are Baykar,” Baykar Tech, accessed March 2, 2023, <https://www.baykartech.com/en/about/>.

<sup>91</sup> Baykar Tech, “We are Baykar.”

<sup>92</sup> Bruno Oliveira Martins, Pinar Tank, and Beste İşleyen, *Turkish Drones as a Foreign Policy Tool: A Technology-Mediated Search for Autonomy*, Mideast Policy Brief 01 (Oslo, Norway: PRIO Middle East Centre, 2023), 2, <https://www.prio.org/publications/13435>.

<sup>93</sup> Martins, Tank, and İşleyen, 2.

<sup>94</sup> Martins, Tank, and İşleyen, 2.

<sup>95</sup> Martins, Tank, and İşleyen, 2.

drone industry began ascending to new heights when Selçuk Bayraktar, son of the founder of Baykar, returned to Turkey from the Massachusetts Institute of Technology and mobilized capital and resources to transform Baykar into a drone manufacturer. The venerable TB2 emerged and began flying in 2014.<sup>96</sup>

The TB2 is Turkey's most recognizable drone, and it offers capabilities that make it suitable for a wide variety of missions, thereby enhancing its appeal on the export market. Its relatively high-altitude capability of up to 25,000 feet and 24-hour-plus airtime make it an ideal platform for ISR missions, but it is equally adept at conducting armed attack missions.<sup>97</sup> It has specially designed munitions, such as the MAM-C or MAM-L air-to-ground missiles. It can carry four of either variant, and the munitions have laser guidance sensors capable of striking moving targets.<sup>98</sup> Each missile can also carry various warheads, such as armor-piercing or incendiary variants, tailored to a specific mission.<sup>99</sup> In short, these capabilities allow the TB2 to fulfill various armed and unarmed missions easily.

The relatively low cost of the TB2 makes it enticing for countries interested in procuring a capable drone at a reasonable cost. Bayraktar seems to understand how Turkey's TB2 has grown into its price point and offers a unique price-to-capability ratio: "Tactically, it's right in the sweet spot. It's not too small, but it's not too big. And it's not too cheap, but it's not too expensive."<sup>100</sup> There appears to be little consensus on how much a TB2 costs, but one report suggests that Ukraine bought six TB2s in 2019 for approximately \$69 million.<sup>101</sup> In contrast, a fleet of six U.S. MQ-9 reaper drones reportedly costs about six times that figure.<sup>102</sup>

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<sup>96</sup> Martins, Tank, and İşleyen, 2.

<sup>97</sup> "Bayraktar TB2," Baykar Tech, accessed March 12, 2023, <https://www.baykartech.com/en/uav/bayraktar-tb2/>.

<sup>98</sup> "Bayraktar TB2," Military-Today, accessed March 16, 2023, [https://www.military-today.com/aircraft/bayraktar\\_tb2.htm](https://www.military-today.com/aircraft/bayraktar_tb2.htm).

<sup>99</sup> Military-Today, "Bayraktar TB2."

<sup>100</sup> Witt, "The Turkish Drone That Changed the Nature of Warfare."

<sup>101</sup> Witt, sec. 3.

<sup>102</sup> Witt, sec. 3.

Looking at the single unit cost of a TB2 is inappropriate, however. Turkey sells the TB2 as part of a package by including communications equipment, command stations, munitions, training, and general support with the purchase.<sup>103</sup> The structure also creates an enduring revenue stream for Turkey. Therefore, Turkey creates a lasting relationship when they sell a drone package. A purchasing country frequently sends operators to Turkey for instructional courses and hands-on training, too.<sup>104</sup> Additionally, a purchasing country will look to Turkey for additional equipment, munitions, and support during the life cycle of the drone. These continuing relationships are essential for Turkey because they allow other business relationships to flourish. For instance, Erdoğan frequently brings AKP-affiliated business executives with him on trips to Africa.<sup>105</sup> Past examples include Erdoğan bringing Selim Bora, President of the major construction company Summa, and Ismail Demir, Turkey’s defense industry czar.<sup>106</sup>

Turkey also sells other drones besides the TB2, and it continues developing drones with new capabilities to meet the ever-increasing drone demand in the continually evolving security space. For example, Baykar Tech tested its first jet-powered drone, Kizilelma, aimed at air-to-air engagements in late 2022.<sup>107</sup> Baykar is also developing the TB3, which appears to be a TB2-like drone capable of operating from short runways and even aircraft carriers.<sup>108</sup> Interestingly, Turkey converted an under-construction aircraft carrier into a drone carrier after leaving the F-35 program.<sup>109</sup> This carrier will serve as a platform for Turkey’s newest drones. It appears that Baykar and Turkey look to capitalize

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<sup>103</sup> Witt, sec. 3.

<sup>104</sup> Witt, sec. 3.

<sup>105</sup> Cannon, “Turkey’s Defense Industry and Military Sales in Sub-Saharan Africa: Trends, Rationale, and Results.”

<sup>106</sup> Cannon, under “Deployment and Sales.”

<sup>107</sup> Omer Berberoglu, “Turkey’s Baykar Launches New Jet-Powered Drone, Aiming for Air-to-Air Combat,” Reuters, last modified December 15, 2022, <https://www.reuters.com/business/aerospace-defense/turkeys-baykar-launches-new-jet-powered-drone-aiming-air-to-air-combat-2022-12-15/>.

<sup>108</sup> “Bayraktar TB3,” Baykar Tech, accessed March 15, 2023, <https://baykartech.com/en/bayraktar-tb3/>.

<sup>109</sup> Berberoglu, “Turkey’s Baykar Launches New Jet-Powered Drone, Aiming for Air-to-Air Combat,”

on the success of the TB2 to offer new products capable of sustaining public interest and encouraging new sales and connections between Ankara and foreign governments.

The key points of Turkey's rapidly ascending drone program are that it sells an in-demand product at a reasonable price point relative to its capabilities. Moreover, it sells its drones as part of a larger support package, creating an enduring relationship between Turkey and the purchasing country. The recent publicity that Turkey has received appears to fuel further demand for this drone, and Bayraktar and the Turkish government appear eager to take advantage of further opportunities to advance economic and foreign policy aims.

However, observers and analysts should exercise some caution when making determinations about the effectiveness and future viability of Turkish drones like the TB2. Erdoğan, Bayraktar, and the Turkish government understand that their products have an excellent price-to-capability ratio. They serve as a solution for many countries with security issues with permissible environments for a relatively modest drone. Turkey's social media campaigns portraying the TB2's successes and shaping a potential narrative about the future of drone warfare in the future are enticing.<sup>110</sup> Nevertheless, this narrative intentionally masks a larger truth about Turkey's current drones. In a high-end conflict, TB2s and similar types of drones drastically lose effectiveness and survivability when adversaries have moderately capable air defenses.<sup>111</sup> Turkey's deft use of media to highlight successes further underscores the notion that they use drones to garner domestic favor and utilize their successes to advance political and economic aims. Drones will remain a powerful narrative tool if Turkey continues to shape the storyline.

### **C. BAYRAKTAR AND THE TURKISH GOVERNMENT: A CONNECTION**

Another interesting connection between Turkey's drones and its government, especially Erdoğan himself, is that Selçuk Bayraktar is married to Erdoğan's daughter. While the precise dynamics of this relationship are unclear, it suggests that Bayraktar is

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<sup>110</sup> Aaron Stein, "Say Hello to Turkey's Little Friend: How Drones Help Level the Playing Field," War on the Rocks, last modified June 11, 2021, <https://warontherocks.com/2021/06/say-hello-to-turkeys-little-friend-how-drones-help-level-the-playing-field/>.

<sup>111</sup> Stein, "Say Hello to Turkey's Little Friend: How Drones Help Level the Playing Field."

intimately involved with and on behalf of the Turkish government in managing and reinforcing the presence of some of Turkey's most recognizable drones abroad. His media presence also suggests that he is aware of his outsized influence, especially when the TB2 commands considerable attention in the media. Some in Turkey view him as their version of Elon Musk, according to Federico Donelli, a researcher from the University of Genoa who has followed and written about Turkey's drone program.<sup>112</sup> In the early days of Russia's invasion of Ukraine, a video posted by Valerii Zaluzhnyi, the senior commander of Ukraine's armed forces, showed an explosion of Russian units caused by a munition dropped from a TB2. The caption on the video read, "Behold the work of our life-giving Bayraktar!"<sup>113</sup> Additionally, Bayraktar became the subject of a popular Ukrainian folk song and the namesake of animals in a Kyiv zoo.<sup>114</sup> This lionization of Bayraktar and the TB2 has created new opportunities for Bayraktar and Turkey to publicize perhaps their most recognizable security export.

Bayraktar is an outspoken and unreserved supporter of Erdoğan's Turkey, and the connection between the Bayraktars and Erdoğan reaches back for decades.<sup>115</sup> When Selçuk began designing drones, his father, Özdemir, sought the support of the Turkish government. Özdemir had good relations for decades with Necmettin Erbakan, Turkey's former prime minister. Erbakan's protégé was Erdoğan, and the connection also benefitted from Özdemir's time as an advisor to Erdoğan when he was active locally in Istanbul's political scene.<sup>116</sup> Thus, Selçuk gained access to the Turkish military, and he was able to spend his time and gain the support of various levels of the Turkish government in developing drones and capabilities that the latter quickly realized were needed as the foreign drones it attempted to acquire proved ineffective for the country's needs.

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<sup>112</sup> Witt, "The Turkish Drone That Changed the Nature of Warfare."

<sup>113</sup> Witt, sec. 1.

<sup>114</sup> Witt, sec. 1.

<sup>115</sup> Witt, sec. 2.

<sup>116</sup> Witt, sec. 2.

Again, connections like this help explain how Turkey’s use of drones not only contributes to its evolving foreign policy. The business, economic, and even political connections are essential as well. For Erdoğan, his family is married to the business, which makes his personal engagement with African heads of state on the matter less surprising. Given these connections and the current popularity supported by deft media portrayals, these stances and engagement will likely continue.

#### **D. CASE STUDIES**

Turkey continues to seek an expansion of the market for its TB2 drone. As of mid-2022, at least 14 countries have purchased the TB2, and at least another 16 have expressed interest in reaching an agreement with Turkey.<sup>117</sup> As Figure 1 shows, Turkey has received considerable interest from countries in its near periphery, but interest also continues to grow within sub-Saharan Africa. The Ethiopian case is significant due to the relative primacy of use in the region, the extensive media coverage, and the likely engagement of civilian populations by the drone’s weapons. The Nigerian case is also significant because of Nigeria’s continued engagement against violent extremist organizations (VEOs) and Nigeria’s role as a burgeoning regional power on the continent. Niger, Somalia, Angola, and others have also expressed an interest in purchasing drones. While Somali’s security ties with Turkey predate its drone purchases, the other cases provide evidence that Turkey is continuing to deepen its ties across the subcontinent and is willing to sell some of its most capable drones to achieve this aim. Additionally, Turkey can typically extract economic and political concessions from its African partners by using drones as a bargaining chip.<sup>118</sup>

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<sup>117</sup> Umar Farooq, “‘The Drone Problem’: How the U.S. Has Struggled to Curb Turkey, a Key Exporter of Armed Drones,” ProPublica, last modified July 12, 2022, <https://www.propublica.org/article/bayraktar-tb2-drone-turkey-exports>.

<sup>118</sup> Federico Donelli, *UAVs and Beyond: Security and Defence Sector at the Core of Turkey’s Strategy in Africa*, Megatrends Afrika Policy Brief 02 (Berlin, Germany: Stiftung Wissenschaft und Politik, 2022), [https://www.swp-berlin.org/assets/afrika/publications/policybrief/MTA\\_PB02\\_2022\\_Donelli\\_UAVs\\_and\\_beyond.pdf](https://www.swp-berlin.org/assets/afrika/publications/policybrief/MTA_PB02_2022_Donelli_UAVs_and_beyond.pdf).

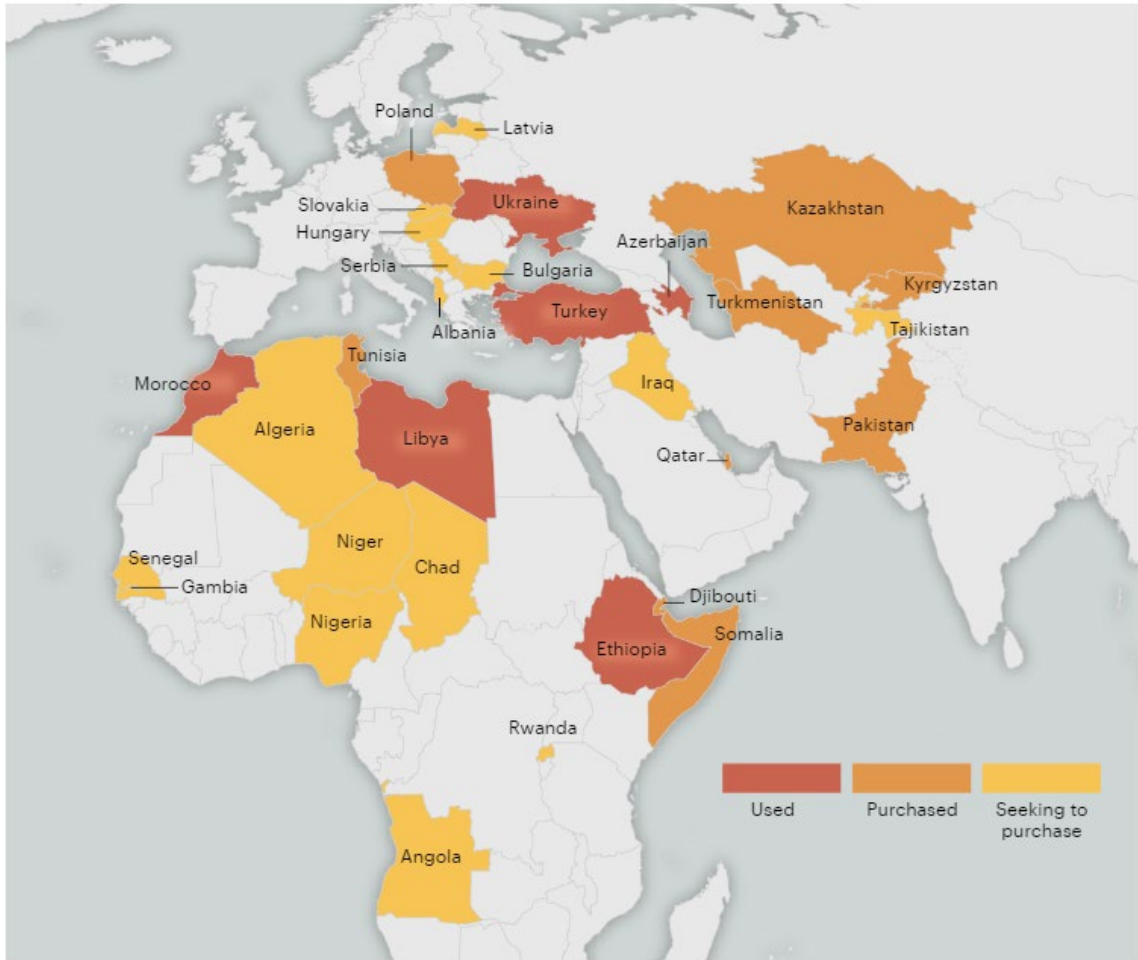


Figure 1. Purchases and Interest in Turkish Drones as of July 2022<sup>119</sup>

## 1. Ethiopia

Turkey has been one of the most influential actors affecting the Ethiopian conflict. Its drones helped reverse government losses against the Tigray forces, and the rapid ascent of its assistance was striking.<sup>120</sup> Between 2020 and 2021, Turkey’s military exports to Ethiopia increased dramatically, with one report characterizing the increase as

<sup>119</sup> Source: Farooq, “‘The Drone Problem’: How the U.S. Has Struggled to Curb Turkey, a Key Exporter of Armed Drones.”

<sup>120</sup> Francesca Caruso and Jesutumilehin O. Akamo, *Ethiopia and the Tigray War: Limits and Challenges of EU Policy in a Fragmented and Contested Region*, JOINT Research Papers 16 (Rome, Italy: JOINT: A Joined-Up Union, a Stronger Europe, 2023), 23–24, [https://www.jointproject.eu/wp-content/uploads/2023/02/joint\\_rp\\_16.pdf](https://www.jointproject.eu/wp-content/uploads/2023/02/joint_rp_16.pdf).

reaching almost \$95 million from a previous base of just \$234,000.<sup>121</sup> This increase is especially notable since some of Ethiopia's traditional security suppliers, such as France, appeared to temper sales as the civil conflict began.<sup>122</sup> At first glance, the partnership between Turkey and Ethiopia may seem rather natural. Turkey, looking to capitalize on the commercial success of its drone, found a willing partner in an Ethiopia interested in purchasing drones. A closer analysis, however, points to deeper undercurrents.

In early 2021, Ethiopian Prime Minister Abiy Ahmed indicated an interest in obtaining Turkish TB2 drones.<sup>123</sup> After a series of negotiations at the working level, the deal came together when Ahmed visited Ankara and personally met with Erdoğan. After Erdoğan authorized the sale, reports indicated that in addition to receiving an economic boost from the deal, Turkey also convinced the Ethiopian government to close ten Gülenist schools.<sup>124</sup> Closing Gülenist schools or transferring their operation to Turkish control remains a priority for Erdoğan. Since the 2016 coup, Erdoğan and his allies have accused Fetullah Gülen of fomenting unrest that contributed to the coup attempt.<sup>125</sup> Turkey views the worldwide network of schools as a hotbed of destabilizing activity and recruiting centers for a so-called Gülen movement.

Turkey also secured contracts from the government of Ethiopia and likely found a way to protect its interests in Somalia. Turkey obtained reconstruction contracts from Ethiopia that would help the latter repair infrastructure damages caused by the civil war.<sup>126</sup> This concession links Turkey's drone activities and support for its commercial and domestic interests. Finally, improved relations with Ethiopia helped secure Turkey's interests in Somalia. Given Ethiopian Prime Minister Abiy Ahmed's assurances of

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<sup>121</sup> Caruso and Akamo, 24.

<sup>122</sup> Cannon, "Turkey's Defense Industry and Military Sales in Sub-Saharan Africa: Trends, Rationale, and Results."

<sup>123</sup> Federico Donelli, *UAVs and Beyond: Security and Defence Sector at the Core of Turkey's Strategy in Africa*, 4.

<sup>124</sup> Donelli, 4.

<sup>125</sup> Alexander, "Turkey on Diplomatic Push to Close Schools Linked to Influential Cleric."

<sup>126</sup> Caruso and Akamo, *Ethiopia and the Tigray War: Limits and Challenges of EU Policy in a Fragmented and Contested Region*, 24.

working with Somalia to resolve disputes, Turkey can likely take advantage of closer relations with Ethiopia to protect its security interests in Somalia from any spillover from the conflict.<sup>127</sup>

When media reports emerged questioning Ethiopia about its use of Turkey's drones in attacks against civilians, Turkey was decidedly quiet on the matter. Turkish officials initially proclaimed that the sale of their drones was a commercial matter, but later reporting from the *New York Times* suggested that they were sensitive to mounting criticism from the international community: "Turkish officials have privately claimed to have frozen exports to Ethiopia, apparently in response to international pressure over a war that has become a byword for atrocities and starvation."<sup>128</sup> This suggests that although Turkey sells its drones with few preconditions related to their use, it is sensitive to its international image being grievously affected by issues stemming from the use of its hardware. However, Turkey's sales here are notable given the embargo other traditional suppliers have placed on Ethiopia, such as France.<sup>129</sup>

## 2. Nigeria

Turkey has also been able to extract concessions from Nigeria related to the sale of its drones, although these concessions are related primarily to natural materials. Again, Nigeria's interest initially stemmed from a security need in the northern part of its country, and Turkey quickly took advantage. In 2021, a media aide for Nigerian President Muhammadu Buhari stated that Turkish technology would "surely quicken the process and efforts to rid the country of pockets of terrorists."<sup>130</sup> In 2022, Senator Ali Ndume, the Chairman of the Senate Committee of the Army, said in an interview that drones were

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<sup>127</sup> Vertin, "Turkey and the New Scramble for Africa: Ottoman Designs or Unfounded Fears?,"

<sup>128</sup> Declan Walsh, "Foreign Drones Tip the Balance in Ethiopia's Civil War," *New York Times*, last modified December 20, 2021, <https://www.nytimes.com/2021/12/20/world/africa/drones-ethiopia-war-turkey-emirates.html>.

<sup>129</sup> Cannon, "Turkey's Defense Industry and Military Sales in Sub-Saharan Africa: Trends, Rationale, and Results."

<sup>130</sup> Nosmot Gbadamosi, "Turkey's Newest African Ally," *Foreign Policy*, last modified June 8, 2022, <https://foreignpolicy.com/2022/06/08/turkey-niger-arms-drone-sale-counterterrorism-sahel/>.

critical for Nigerian operations against VEOs and that Turkey was one of the more advanced countries in drone development.<sup>131</sup>

Turkey's relationship with Nigeria is one of its most significant in West Africa. Aside from having longstanding ties, Nigeria is one of Turkey's main trading partners in the region.<sup>132</sup> As the trade volume between the two countries surpasses \$2 billion, the energy sector remains Turkey's top priority.<sup>133</sup> By one calculation, oil and liquified natural gas account for nearly 95 percent of exports from Nigeria to Turkey.<sup>134</sup> When Erdoğan met with Buhari in 2021, the two discussed energy supply contracts set to expire in mid-2022 and the prospect of contracts covering future years.<sup>135</sup> Part of the conditions for renewing and extending these contracts involved Turkey selling Nigeria drones.<sup>136</sup> Therefore, the linkage between business and Turkish drones becomes apparent.

Turkey's interest in the natural resources of Nigeria also extends to precious metals. Reports suggest Turkey aspired to work directly with Zamfara, a Nigerian state with gold mines. "The state's governor, Bello Mohammed Matawalle, has received the green light from Abuja to deal with UK and Turkey [for] the purchase of armed drones in exchange for mining concessions," wrote Stiftung Wissenschaft und Politik (German Institute for International and Security Affairs).<sup>137</sup> This again demonstrates the leverage that Turkey can exercise by offering its drones for sale.

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<sup>131</sup> "Nigeria is Procuring Drones from Turkey to Fight Insecurity, Says Senator Ali Ndume," April 19, 2022, Channels Television, video, 0:14, <https://twitter.com/channelstv/status/1516506229962596353?s=20&t=z3NxWf08bymTxvlnDmZjGA>.

<sup>132</sup> Donelli, *UAVs and Beyond: Security and Defence Sector at the Core of Turkey's Strategy in Africa*, 5.

<sup>133</sup> Donelli, 5.

<sup>134</sup> Donelli, 5.

<sup>135</sup> Donelli, 5.

<sup>136</sup> Donelli, 5.

<sup>137</sup> Donelli, 5.

### 3. Other Cases

Aside from Nigeria and Ethiopia, the other sub-Saharan African customers also provide essential insight into Turkey's aims and methods across the subcontinent. Somalia retains natural importance in Turkish strategy from the previously existing relationship. However, as Figure 1 shows, other countries have expressed interest, and some have reportedly reached agreements since that map was compiled in July 2022. In all cases, the purchasing country gains a useful capability while Turkey gains domestic, monetary, or influence benefits.

In September 2022, Somalia's government confirmed that Turkish drones were active in Somalia's war against al-Shabab.<sup>138</sup> Somalia's interior minister confirmed that Turkish drones provided reconnaissance and aerial combat and integrated with Somalia's ground forces.<sup>139</sup> Interestingly, Somalia appeared to view the introduction of Turkish drones as a new capability that would change the existing balance in the conflict. Abdisalam Guled, Somalia's former deputy spy chief stated, "If you look at the limited U.S. air strike in Somalia, it has significantly reduced the group's military activities over the years, but, if Turkish drones are fully involved, I think it would change the war." He also highlighted how this new Turkish capability complements its extensive existing efforts focused on training Somali forces within Somalia. From the Somali point of view, it appears that Turkey was willing to provide a capability above and beyond what the U.S. and other partners were willing to provide.

From Turkey's point of view, continuing and increasing its assistance to Somalia serves a few purposes. First, it allows Erdoğan and the AKP to continue the narrative of Turkey as a growing power capable of aiding countries in need, which continually plays well with the Turkish domestic audience.<sup>140</sup> In addition, Turkey's actions in Somalia

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<sup>138</sup> Bashir Mohamed Caato, "Somalia: Turkey's Bayraktar TB2 drones join offensive against al-Shabab," Middle East Eye, last modified October 1, 2022, <https://www.middleeasteye.net/news/somalia-turkey-bayraktar-tb2-drones-join-offensive-shabab>.

<sup>139</sup> Caato, "Somalia: Turkey's Bayraktar TB2 drones join offensive against al-Shabab."

<sup>140</sup> Willem van den Berg and Jos Meester, *Turkey in the Horn of Africa: Between the Ankara Consensus and the Gulf Crisis*, CRU Policy Brief (The Hague, Netherlands: Clingendael Institute, 2019), 1–3, [https://www.clingendael.org/sites/default/files/2019-05/PB\\_Turkey\\_in\\_the\\_Horn\\_of\\_Africa\\_May\\_2019.pdf](https://www.clingendael.org/sites/default/files/2019-05/PB_Turkey_in_the_Horn_of_Africa_May_2019.pdf).

and throughout the Horn of Africa also help relations with Qatar and serve as a unified front against Saudi Arabia, Egypt, Bahrain, and the United Arab Emirates (UAE).<sup>141</sup> Finally, the presence in Somalia also helps secure Turkey's business interests tied to significant infrastructure investment, key deals involving ports, and a growing trade relationship.<sup>142</sup>

Niger and Togo also have taken delivery of Turkish drones. Niger reportedly signed an agreement in November 2021 that featured the Turkish TB2 along with armored vehicles and light attack aircraft.<sup>143</sup> The agreement's stated purpose was to increase Niger's capability to fight extremist organizations operating in the border area shared with Burkina Faso and Mali.<sup>144</sup> With Niger looking to attract new partners and interest in its ability to host forces to fight against extremists, it seemingly comes as little surprise that it would take advantage of Turkey's drone offer. Nigerian President Mohamed Bazoum is keenly aware of the need to hedge against decreasing levels of support after Mali terminated France's Operation Barkhane and Operation Takuba, an EU-led effort. Turkey can offer the increased capability and a robust relationship, and it can take credit for assisting a country in its effort against extremists.

Togo acquired its TB2 drones in 2022. Facing the same security challenges as its neighbors, Togo reportedly plans to use the drones to monitor and degrade the capability of extremist fighters who cross borders in the Sahel with relative impunity. Again, it appears that direct engagement between Erdoğan and Togo's president Faure Gnassingbé in Togo's capital laid the groundwork for the deal.

Burkina Faso also reportedly received TB2 drones in mid-2022 to help combat armed militant groups along its borders. The purchase was allegedly negotiated between Burkina Faso's Defense Minister, Aimé Barthélemy Simporé, and the Turkish authorities

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<sup>141</sup> Van den Berg and Meester. 3.

<sup>142</sup> Guled Ahmed, "Far From a Benefactor, the Turkish Government is Exploiting Somalia's Fragility," Middle East Institute, last modified October 21, 2021, <https://www.mei.edu/publications/far-benefactor-turkish-government-exploiting-somalias-fragility>.

<sup>143</sup> Gbadamosi, "Turkey's Newest African Ally."

<sup>144</sup> Gbadamosi, "Turkey's Newest African Ally."

at a military conference in Istanbul in August 2021.<sup>145</sup> These origins suggest that the increase in diplomatic and military visits between Turkey and other countries lays the groundwork for future deals. Turkey’s initiative appears to create the opportunity to forge agreements.

Angola has also expressed interest in Turkey’s products. In late 2021, Erdoğan personally announced that Angola had requested drones and armored personnel carriers.<sup>146</sup> Tellingly, Angola’s request initially stemmed from a meeting between Angolan president Joao Lourenco’s visit to Turkey earlier in 2021, again underscoring the impact of Erdoğan’s personal engagement with leaders in the region. Furthermore, Erdoğan also simultaneously expressed the notion that an increase in cooperation between the countries would encourage new lines of economic and business communication to broaden cooperation regionally within sub-Saharan Africa.<sup>147</sup>

## **E. KEY LESSONS**

The background and case studies provided here demonstrate that Turkey is proving adept at using the sale of its domestically produced drones to serve its foreign policy, domestic, and economic interests. This effort extends from the lower echelons of government and business through the very top of the Turkish government, culminating in frequent personal involvement from Erdoğan. While it appears that Turkey does not explicitly restrict the use of drones, it often extracts concessions from the country before agreeing to the sale. These include political (closing Gülenist schools) and economic (energy and construction contracts). It is also telling that countries are currently clamoring for Turkish drones in an increasingly crowded market. Collectively, this suggests three things. First, sub-Saharan African countries are willing to exude some agency and diversify beyond traditional arms suppliers, such as China and the U.S., to fill

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<sup>145</sup> Turkey’s Armed Drones Make Third Sahel Conquest,” Africa Intelligence, August 9, 2022, <https://www.africaintelligence.com/west-africa/2022/09/08/turkey-s-armed-drones-make-third-sahel-conquest,109810765-blg>.

<sup>146</sup> “Angola Sought Turkish Drones, New Talks Include Armored Carriers,” Daily Sabah, October 18, 2021, <https://www.dailysabah.com/business/defense/angola-sought-turkish-drones-new-talks-include-armored-carriers>.

<sup>147</sup> Daily Sabah, “Angola Sought Turkish Drones, New Talks Include Armored Carriers.”

an emerging security concern. Second, it also potentially suggests that Turkey's ability to influence these countries through its more robust outreach is working. Third, and relatedly, it shows that Turkey is succeeding in shaping the narrative surrounding its drone, and this curated story helps Erdoğan and Turkey utilize Turkish drones for various beneficial ends.

While Turkey's outreach across Sub-Saharan Africa, especially via the sales of its drones, is noteworthy, it also potentially demonstrates something more significant about the changing nature of warfare and the types of weapons and platforms increasingly desired by purchasing nations. One of the TB2's key selling points is that it is a capable drone sold relatively inexpensively, especially compared to drones available from other countries. By providing a capable solution at a low cost, Turkey enables countries to add relatively inexpensive ISR capability and a potential pathway to armed drone usage against enemies. Drone proliferation in other parts of the world is nothing new, either. Some research suggests China's drone exports in the 2010s contributed to a proliferation in drone usage in countries that previously did not have the means or ability to acquire such capabilities.<sup>148</sup> Therefore, the effect of Turkey's sales in sub-Saharan Africa may be contributing to a similar paradigm shift in the region. As the next chapter explores, this may influence U.S. interests and future security cooperation and assistance in the region. At the very least, it highlights a facet of warfare's ever-changing dynamics and how new technologies can alter security relationships. It seems Turkey is at the forefront of this change and is leveraging its domestic resources and burgeoning international clout to take advantage of new opportunities.

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<sup>148</sup> Michael Horowitz, Joshua A. Schwartz, and Matthew Fuhrmann, "Who's Prone to Drone? A Global Time-Series Analysis of Armed Uninhabited Aerial Vehicle Proliferation," *Conflict Management and Peace Science* 39, no. 2 (March 2022): 119, <https://doi.org/10.1177/0738894220966572>.

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## IV. THE U.S. LAGGING BEHIND A CHANGING LANDSCAPE

### A. INTRODUCTION

As Turkey's presence in the drone market across Sub-Saharan Africa continues to expand, the use of its products and Turkey's overall motivations will undoubtedly come under even more scrutiny. Already, U.S. authorities have taken issue with the use of U.S. parts procured via commercial methods in Turkish drones and their potential use against civilians in the civil war in Ethiopia.<sup>149</sup> The first step in analyzing these criticisms involves understanding why Turkey gained access to the security assistance market via drone sales. While Turkish domestic factors and a newly revitalized foreign policy played an outsized role in the push into Sub-Saharan Africa, other factors aligned for Turkey in expanding its drone program.

One of the first factors involves the changing security landscape. Drone proliferation continues worldwide as the technology matures, especially in Africa (see Figure 2). Manufacturers have reduced the cost and complexity of operating drones, and a growing number of nations offer drones for sale in the arms market, especially Israel and China.<sup>150</sup> With relatively modest costs and a strong demand for drone capability, it is logical for a robust market to form. Turkey has taken advantage of this new demand beyond sub-Saharan Africa, too. Its drones have been sold or proposed for sale in North Africa, Eastern Europe, and the Near East. However, Turkey's entrance into the sub-Saharan market has dovetailed nicely with its larger regional aims.

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<sup>149</sup> Jonathan Spicer, Giulia Paravicini, and Orhan Coskun, "EXCLUSIVE: U.S. Concerned Over Turkey's Drone Sales to Conflict-Hit Ethiopia," Reuters, last modified December 22, 2021, <https://www.reuters.com/world/africa/exclusive-us-concerned-over-turkeys-drone-sales-conflict-hit-ethiopia-2021-12-22/>; Umar Farooq, "U.S. Lawmakers Demand Federal Scrutiny of Turkey's Drones," ProPublica, last modified July 29, 2002, <https://www.propublica.org/article/tb2-drones-turkey-federal-investigation-request>.

<sup>150</sup> Richtsje Kurpershoek, Alejandra Muñoz Valdez, and Wim Zwijnenburg. *Remote Horizons: Expanding Use and Proliferation of Military Drones in Africa*, (Utrecht, Netherlands: Pax for Peace, 2021), 11, [https://paxforpeace.nl/media/download/PAX\\_remote\\_horizons\\_FIN\\_lowres.pdf](https://paxforpeace.nl/media/download/PAX_remote_horizons_FIN_lowres.pdf).

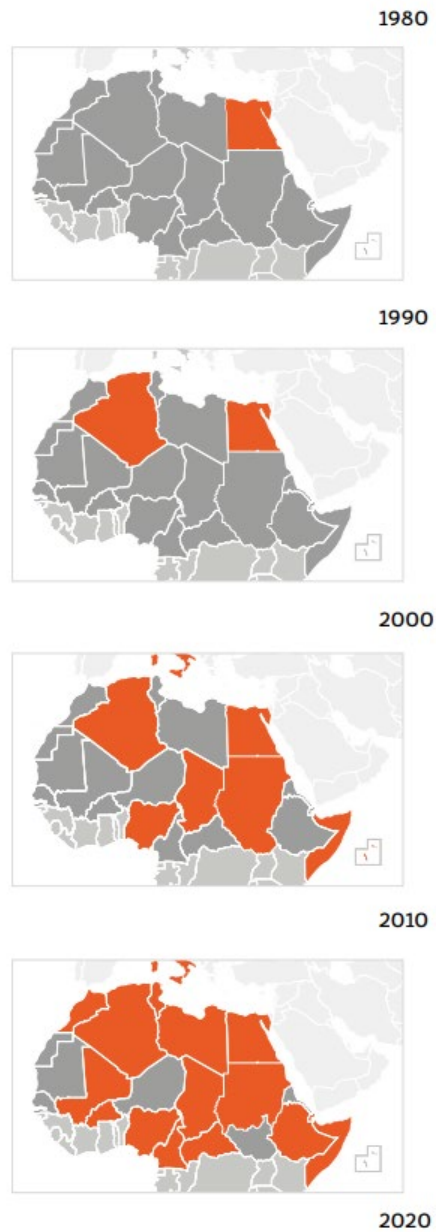


Figure 2. Progression of Drone Use in Africa<sup>151</sup>

Another of these factors may be how shifts in U.S. policy and shifts across Sub-Saharan Africa have left an opening for Turkey to meet the demand in a burgeoning sub-Saharan market. U.S. policy and strategy continue to evolve in the region, and the U.S. continues an evolution of sub-Saharan Africa policy that increasingly features enabling

<sup>151</sup> Source: Kurpershoek, Valdez, and Zwijnenburg, 10.

African partners to take the lead with their security concerns. Nevertheless, and despite a relative level of stability in funding, Africa remains at or near the bottom of U.S. security funding priorities, and most of its funding goes toward humanitarian and development programs. Given the U.S. pivot to Asia, there may also be a reason to wonder how its modest security efforts across Africa, especially sub-Saharan Africa, will evolve over the next decade.

These shifts in the landscape have allowed Turkey to fill the burgeoning drone market while simultaneously providing benefits for Turkey's evolving foreign policy and domestic concerns. As demonstrated by global funding priorities, security commitments, and strategy shifts, recent U.S. actions will likely allow Turkey to continue its penetration into this growing segment. The impact on U.S. interests in the region may be negligible in the short term. However, if the U.S. continues its current trajectory in sub-Saharan Africa vis-à-vis other countries with increasing engagement, like Turkey, its influence as a regional security partner may wane. The key takeaway is that Turkey is filling new demand in the region, and the U.S. appears to evolve toward a policy that tacitly allows for this. Sub-Saharan African nations that purchase Turkish drones and continue to purchase weapons and security tools from multiple partners will likely continue to exhibit increased agency in dealing with their security concerns.

Finally, although Turkey and the U.S. are some of the most relevant providers in this space, other nations have provided numerous products within the drone sector. China, France, and Israel have provided drone solutions, too. Examples of these sales and usage include the Ethiopia case and various countries across the Sahel.

This chapter is structured as follows. The following section looks at current U.S. policy and strategy across Sub-Saharan Africa and how it has evolved in recent decades toward its present state of enabling partners to take the lead in providing for their security. The third section explains the modest level of U.S. security assistance and spending across the region and how the breakdown of spending indicates U.S. priorities and its level of risk aversion. The next section examines the drone landscape across Sub-Saharan Africa and shows how U.S. involvement has not increased at the same level as Turkey's. Additionally, it shows how other nations like China, Israel, and France have

contributed to the increasingly crowded drone landscape across the continent. In the fifth section, the Ethiopian case study shows an example of the interplay between U.S. policy and strategy with Turkish efforts and highlights the unintended consequences of capacity building. The final section concludes and explores future avenues for research, such as what the current trajectory between the U.S. and Turkey within Sub-Saharan Africa may portend for security in the following decades.

## **B. U.S. POLICY AND STRATEGY ACROSS SUB-SAHARAN AFRICA**

U.S. policy in Sub-Saharan Africa continues to evolve from a heavy focus on terrorism. In August 2022, the U.S. released its most recent strategy document outlining U.S. interests and efforts in sub-Saharan Africa. It cites sub-Saharan Africa as a critical region for meeting regional and global priorities by making contributions to “...reverse the global tide of democratic backsliding, address global food insecurity; strengthen an open and stable international system; shape the rules of the world on vital issues like trade, cyber, and emerging technologies; and confront the threat of terrorism, conflict, and transitional crime.”<sup>152</sup> Moreover, it cites leveraging U.S. “diplomatic, development, and defense capabilities” to support objectives like “Deliver(ing) Democratic and Security Dividends.”<sup>153</sup> Finally, the strategy states that its efforts represent a new direction, with a call to “address immediate crises and threats, and seek to connect short-term efforts with the longer-term imperative of bolstering Africa’s capabilities to solve global problems.”<sup>154</sup> These statements, methods, and goals suggest a transition from a primary focus on combatting terrorism and VEOs, a view pervasive across the continent in the 2010s.

Other current U.S. strategic documents also describe a similar stance on Sub-Saharan Africa. For example, the October 2022 U.S. National Security Strategy (NSS) acknowledges that terrorism remains a chief concern despite nearly two decades of

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<sup>152</sup> White House, *U.S. Strategy Toward Sub-Saharan Africa* (Washington, DC: White House, 2022), 4, <https://www.whitehouse.gov/wp-content/uploads/2022/08/U.S.-Strategy-Toward-Sub-Saharan-Africa-FINAL.pdf>.

<sup>153</sup> White House, *U.S. Strategy Toward Sub-Saharan Africa*, 4.

<sup>154</sup> White House, *U.S. Strategy Toward Sub-Saharan Africa*, 5.

sustained counterterrorism efforts.<sup>155</sup> Interestingly, the NSS suggests that the U.S. is preparing to shift “from a strategy that is ‘U.S.-led, partner-enabled’ to one that is ‘partner-led, U.S. enabled.’”<sup>156</sup> In expanding on this point, the NSS discusses building partner capacity and addressing factors contributing to terrorism, like poor governance and the ease of recruiting for terrorist organizations. Moreover, it calls for greater transparency and accountability in this effort, suggesting that efforts must remain congruent with domestic and international law.<sup>157</sup> With the mention of political solutions, root cause analysis for issues like terrorism, and regional partnerships, it appears that the U.S. is looking to enable countries to take the lead.

The most recent U.S. Africa Command (AFRICOM) posture statement from General Stephen Townsend in March 2022 also provides context for the U.S. interests, concerns, and strategy in the region. For example, it states that seven of the top countries that experienced increased terrorism in 2020 were in Sub-Saharan Africa.<sup>158</sup> Furthermore, he states that many VEOs were gaining an increasingly strong foothold in the Sahel region and within East Africa. Tellingly, his prescription for driving back the resurgence of VEOs mentioned the increased importance of bilateral partnerships: “It is my judgement that greater and more coordinated efforts are necessary by our African and international partners, with continued U.S. support, if we are to check the pervasive spread of violent extremism – especially in East and West Africa.”<sup>159</sup>

General Townsend’s characterization of the available tools the U.S. possesses to meet these objectives highlights the level of resources that the U.S. devotes to the region. He stated that “gaining and maintaining access and influence underpins all U.S.

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<sup>155</sup> White House, *National Security Strategy* (Washington, DC: White House, 2022), 30, <https://www.whitehouse.gov/wp-content/uploads/2022/10/Biden-Harris-Administrations-National-Security-Strategy-10.2022.pdf>.

<sup>156</sup> White House, *National Security Strategy*, 30.

<sup>157</sup> White House, *National Security Strategy*, 31.

<sup>158</sup> *Investing in America’s Security in Africa: A Continent of Growing Strategic Importance*, 117<sup>th</sup> Congress (2022) (statement of General Stephen Townsend, United States Army, Commander, United States Africa Command).

<sup>159</sup> Townsend, testimony on *Investing in America’s Security in Africa*.

government efforts in Africa and is the cornerstone of our campaign.”<sup>160</sup> Moreover, “AFRICOM primarily achieves access and influence in priority locations through focused activities such as senior leader engagements; security force assistance and cooperation; and multi-national exercises. We effectively leverage our resources through this range of effective, low-cost opportunities.”<sup>161</sup> There appears to be a clear undertone of how there are finite resources to devote to Sub-Saharan Africa and that the U.S. is primarily interested in enabling African partners to take the lead. While this aligns with other strategic documents like the NSS, it still does not adequately address whether this level and style of U.S. involvement align with what partners on the sub-continent desire.

While the scope of the U.S. strategy is broad, and the documents rarely offer specifics, the strategy’s tone and content suggest that generally enabling partners with U.S. support will be the key moving forward. For example, during a trip to Nigeria, Senegal, and Kenya that previewed themes of a redesigned sub-Saharan strategy, Secretary of State Blinken gave a speech that continually reinforced the theme of listening to partners in the region and partnering with them to find solutions: “We will work with partners to tackle 21st century threats to democracy,” and “We’re starting by asking our local partners where our help can make the biggest difference.”<sup>162</sup> However, a general theme of great power competition continues to pervade U.S. thought and strategy. In the same speech, Secretary Blinken said, “[African nations] have been told to pick a side in great power contests that feel far removed from daily struggles of their people. The United States will not dictate Africa’s choices. Neither should anyone else. The right to make these choices belongs to Africans, and Africans alone.”<sup>163</sup> Despite a suggestion that the U.S. will not force a choice, acknowledging that there is a choice to be made

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<sup>160</sup> Townsend, testimony on *Investing in America’s Security in Africa*.

<sup>161</sup> Townsend, testimony on *Investing in America’s Security in Africa*.

<sup>162</sup> Antony J. Blinken, “Vital Partners, Shared Priorities: The Biden Administrations Sub-Saharan Africa Strategy,” U.S. Department of State, last modified August 8, 2022, <https://www.state.gov/vital-partners-shared-priorities-the-biden-administrations-sub-saharan-africa-strategy/>.

<sup>163</sup> Blinken, “Vital Partners, Shared Priorities: The Biden Administrations Sub-Saharan Africa Strategy.”

presents the issue as a competition. It would seem, then, that the U.S. wishes to be the provider of choice.

Nods like these to great power competition caught the attention of sub-Saharan African partners. One journalist based in Lagos stated in 2021 that despite the new rhetoric beginning to emerge from the Biden administration, nothing had changed:

For all of the ‘America is a friend to Africa’ rhetoric we see, America and other Western powers have since reduced their presence on the continent. Instead, we have a continent where China, Russia, and Turkey are making substantial investments, as well as forming new alliances in trade, security, and the military. Blinken’s trip really is just a show of power in this new iteration of a Cold War.<sup>164</sup>

Concern also exists within U.S. policy circles. Elizabeth Skackelford, a former career diplomat and senior U.S. foreign policy analyst at the Chicago Council on Global Affairs, offered a similar perspective: “Even as Blinken is crossing the continent saying, ‘Absolutely, this is about our relationships in Africa. It’s not about other geopolitical issues,’ they keep circling back to criticisms of countries’ relationships with China and Russia.”<sup>165</sup> Comments like these are telling because they lend weight to the notion that African countries are sensitive to being forced to yield agency in dealing with security concerns. African nations want to partner with the country that provides the best solutions for their needs. Turkey, for example, tends to put far fewer conditions on the sale of its drones and other hardware. Therefore, it is fair to question whether the U.S. has the flexibility or willingness to offer security solutions as the landscape evolves and new forms of weaponry, like drones, become increasingly cheaper and easier to obtain from other countries, like Turkey.

Based on a survey of these documents and comments, the U.S. strategy is continually shifting to one that empowers African partners to take the lead on their

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<sup>164</sup> “Africa Reacts to Secretary Blinken’s Africa Tour,” Center for Strategic & International Studies, November 30, 2021, <https://www.csis.org/analysis/africa-reacts-secretary-blinkens-africa-tour>.

<sup>165</sup> Joshua Keating, “Advice for the U.S. in Africa: Stop Lecturing about China and Russia. Instead, Offer Better Options,” Grid, last modified August 11, 2022, <https://www.grid.news/story/global/2022/08/11/advice-for-the-us-in-africa-stop-lecturing-about-china-and-russia-instead-offer-better-options/>.

security issues. However, the documents all offer few specific prescriptions, especially with offers or guarantees of material support. The U.S. level of commitment of support, as measured by total dollars, is relatively modest across the continent. Again, the question is whether the level of U.S. support allows other countries to fill the void and provide the hardware that African leaders feel best serves their interests. The previous review of Turkey’s agile penetration of the sub-Saharan African drone market suggests that its product meets the needs and desires of its regional partners. When President Erdoğan can boast about the interest in Turkish drones and the frequency of meetings with African heads of state, the contrast with U.S. policy and strategy immediately becomes evident.

### **C. TRENDS IN U.S. SECURITY ASSISTANCE ACROSS SUB-SAHARAN AFRICA**

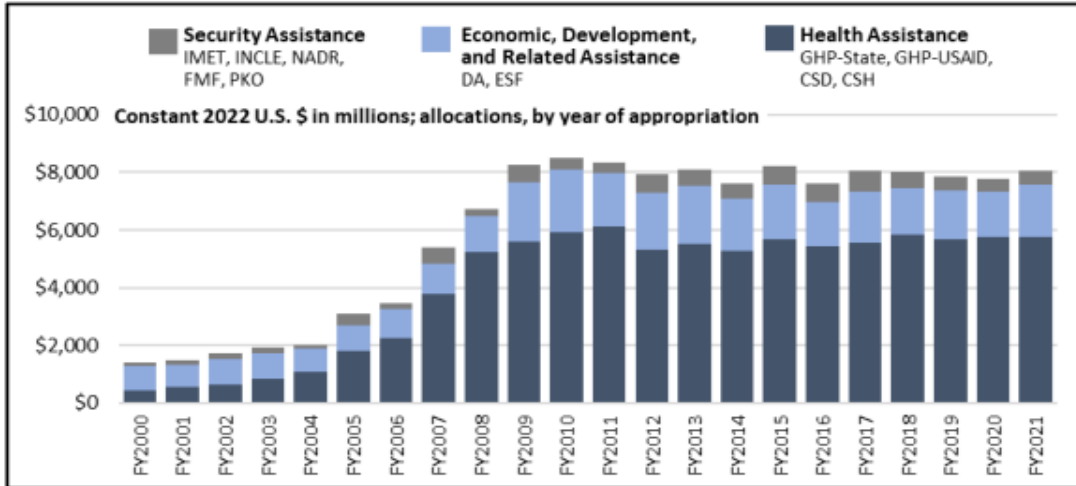
U.S. Security Assistance in Africa has remained relatively constant over the past fifteen years after an increase in the mid-2000s. As Figure 3 illustrates, however, a relatively small amount of the appropriation is allotted to security assistance.<sup>166</sup> The breakdown of the Security Assistance shows that just a few recipients received an outsized majority of the aid (Figure 4).<sup>167</sup> In addition, most of the funding among the recipients is devoted to strengthening capabilities, while a smaller portion is earmarked directly for counterterrorism. Funding for peacekeeping operations (PKO) constitutes most of the State Department funding designated for use in counterterrorism.<sup>168</sup> These breakdowns, therefore, are generally in line with U.S. strategic documents. However, the overall scale is modest, with many efforts only ranging in the hundreds of millions of dollars.

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<sup>166</sup> Tomas F. Husted, Alexis Arieff, Lauren P. Blanchard, and Nicolas Cook, *U.S. Assistance for Sub-Saharan Africa: An Overview*, CRS Report No. R46368 (Washington, DC: Congressional Research Service, 2022), 1–2, <https://sgp.fas.org/crs/row/R46368.pdf>.

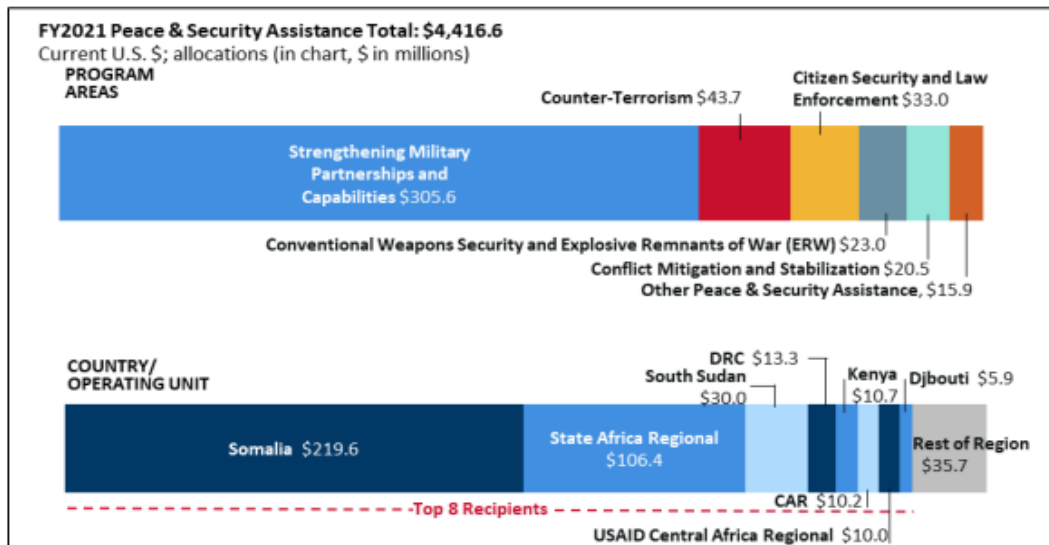
<sup>167</sup> Husted et al., 8.

<sup>168</sup> Husted et al., 8.



**Source:** CRS graphic, based on State Department *Congressional Budget Justifications* (CBJs) for FY2003-FY2023.  
**Notes:** CSD=Child Survival and Disease Programs; CSH=Child Survival and Health Programs; DA=Development Assistance; ESF=Economic Support Fund; FMF=Foreign Military Financing; GHP=Global Health Programs; IMET=International Military Education and Training; INCLE=International Narcotics Control and Law Enforcement; NADR=Nonproliferation, Anti-terrorism, Demining, and Related Programs; PKO=Peacekeeping Operations. Calculations do not include funding allocated from global accounts or programs.

Figure 3. Various U.S. Assistance for Africa<sup>169</sup>



**Source:** CRS graphic. Figures are CRS calculations based on data from State Department CBJ for FY2023.

Figure 4. U.S. Peace and Security Assistance Across Africa<sup>170</sup>

<sup>169</sup> Source: Husted et al., 2.

<sup>170</sup> Source: Husted et al., 8.

The DOD also plays a significant role under Title 10 of the U.S. Code. Unfortunately, country-specific and region-specific funding levels from DOD accounts are unavailable for public release.<sup>171</sup> Generally, however, there is scant evidence of any direct U.S. sales of drones with capabilities similar to the TB2 to sub-Saharan African countries. According to SIPRI, from 2018 to 2021, the U.S. did not sell any drones to sub-Saharan Africa. Instead, during that period, the U.S. transferred drones to Afghanistan, Australia, Belgium, Brunei, France, India, Indonesia, Italy, Japan, Lebanon, Luxembourg, Malaysia, NATO, the Netherlands, Oman, the Philippines, Poland, South Korea, Spain, the United Arab Emirates, the United Kingdom, and Vietnam.<sup>172</sup> One report suggests that the U.S. provided six drones to Cameroon in 2015, but these were the Boeing ScanEagle, a drone much smaller than the TB2 typically used for short-range reconnaissance.<sup>173</sup>

The State Department and USAID provide most U.S. foreign assistance to Africa. Most of the U.S. assistance to Africa, as Fig. 2 shows, consists of health assistance and economic, development, and related assistance. While the \$8 billion is modest compared to other areas, it still represents an influential investment across the continent. The breakdown of this aid is the telling factor, regardless of size. The U.S. likely views the solution to securing its own interests and Africa and gaining influence as better served by softer forms of aid instead of large outflows of security assistance. When arms sales, or the case of the U.S. providing drone-based ISR services to African partners, are appropriate, they represent a calculated risk. Thrall, Cohen, and Dorminey capture the sentiment ideally when they write, “Every arms sale is thus a calculated gamble that the expected strategic and economic benefits will outweigh the potential costs. The risk does not have to be zero, but any negative consequences must be low enough to make the

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<sup>171</sup> Husted et al., 8.

<sup>172</sup> “SIPRI Arms Transfer Database,” Stockholm International Peace Research Institute, March 14, 2022, <https://www.sipri.org/databases/armstransfers>.

<sup>173</sup> Richtsje Kurpershoek, Alejandra Muñoz Valdez, and Wim Zwijnenburg. *Remote Horizons: Expanding Use and Proliferation of Military Drones in Africa*, 16.

decision worth it in the long run.”<sup>174</sup> The U.S. has seemingly determined that selling its drones to African partners is not in its best interest. Turkey, on the other hand, appears to view it as one of its best tools to enable deeper relationships and achieve its broader aims.

#### **D. U.S. INVOLVEMENT WITH AND AMONG THE DRONE LANDSCAPE IN SUB-SAHARAN AFRICA**

Drones are becoming increasingly prevalent across Sub-Saharan Africa. The U.S. has operated drones across the subcontinent for over a decade with the aim of combatting VEOs, especially in the Sahel. The U.S. model has involved flying its drones from a host-nation airfield instead of selling drones for partner nations to operate organically. In addition, the drones are not only operated by the military. Agencies like the CIA often manage drone operations in the theater.<sup>175</sup>

Niger features one of the more prominent examples of U.S. drone usage in sub-Saharan Africa. The CIA established a drone base at Dirkou, Niger, and the U.S. military also built a base known as Niger Air Base 201 in Agadez.<sup>176</sup> With an expected price tag of over \$250 million over ten years, it represents a significant regional investment.<sup>177</sup> The Nigerien government has been supportive of the U.S. use of drones, and the U.S. reportedly uses these bases to look after interests in the Sahel and into North Africa. However, despite the permissive environment for the U.S., there are no indications of U.S. drone sales to Niger. Moreover, the 2022 Turkish drone sale to Niger may represent Niger’s attempts to hedge its bet in procuring needed weapons in an increasingly difficult security environment. While Niger welcomed the U.S. drones and asked for their deployment after the 2018 attack that killed U.S. troops in the country, it has still elected

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<sup>174</sup> Trevor Thrall, Jordan Cohen, and Caroline Dorminey, “Power, Profit, or Prudence? U.S. Arms Sales Since 9/11,” *Strategic Studies Quarterly* 14, No. 2 (Summer 2020): 101, <https://www.jstor.org/stable/26915279>.

<sup>175</sup> John Campbell, “The Presence of Lethal U.S. Drones in Niger is Expanding,” *Council on Foreign Relations* (blog), September 11, 2018, <https://www.cfr.org/blog/presence-lethal-us-drones-niger-expanding>.

<sup>176</sup> Campbell, “The Presence of Lethal U.S. Drones in Niger is Expanding.”

<sup>177</sup> Campbell, “The Presence of Lethal U.S. Drones in Niger is Expanding.”

to purchase drones elsewhere.<sup>178</sup> As Niger begins operating the Turkish drones, the continued operation of U.S. drones from the country may be a leading indicator in determining whether Turkish drones can erode U.S. influence and the willingness of the U.S. to continue its operations.

The U.S. has operated or based drones elsewhere in sub-Saharan Africa. Beginning in 2009, the U.S. operated drones from the Seychelles over the skies of Somalia.<sup>179</sup> The U.S. has used Camp Lemonnier in Djibouti to fly drones, though many of the target areas expanded across the Red Sea to Yemen.<sup>180</sup> Nevertheless, the level of activity its Djibouti is noteworthy and is a linchpin of the U.S. security footprint in eastern Africa. Finally, the U.S. operated drones from Ethiopia for a time. In 2011, the U.S. heavily invested in Arba Minch, Ethiopia, to operate MQ-9 drones designated to track al-Shabaab in Somalia. However, the operation ceased in 2015 without renewal and with little official explanation.<sup>181</sup>

To put the level of U.S. involvement in context with the extreme drone proliferation in the region, Figure 5 shows a continent-wide timeline for drone usage. While its compilation predates Turkey's entrance into the market, it shows how the U.S. share of drone activity is relatively modest. Also, many areas featuring some of the highest drone usages, especially in sub-Saharan Africa, are areas where Turkey has been most active.<sup>182</sup> It appears that the U.S. prefers to use its drones to support its security interests in the region rather than selling its equipment to its partners. While this represents a specific case, it is nevertheless contrary to the stated goals of enabling African partners so heavily featured in strategy documents. The U.S. sells drones elsewhere in the world, and its absence here has likely allowed Turkey and others to fill the security needs of these countries.

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<sup>178</sup> Lara Seligman, "Shadowy U.S. Drone War in Africa Set to Expand," *Foreign Policy*, last modified September 4, 2018, <https://foreignpolicy.com/2018/09/04/shadowy-u-s-drone-war-in-africa-set-to-expand/>.

<sup>179</sup> Richtsje Kurpershoek, Alejandra Muñoz Valdez, and Wim Zwijnenburg. *Remote Horizons: Expanding Use and Proliferation of Military Drones in Africa*, 14.

<sup>180</sup> Kurpershoek, Valdez, and Zwijnenburg, 14.

<sup>181</sup> Kurpershoek, Valdez, and Zwijnenburg, 14.

<sup>182</sup> Kurpershoek, Valdez, and Zwijnenburg, 10.

Other countries have noteworthy involvement in sub-Saharan Africa, especially China, Israel, and France. In 2020, Niger ordered eight drones from China and used them later that year for counterinsurgency operations along its frontiers.<sup>183</sup> In addition, China does not restrict the sale of its small, commercial off-the-shelf (COTS) drones, and armed groups frequently obtain them through legal channels.<sup>184</sup> Israel has sold its drones predominantly to northern African nations, but there is some connection to sub-Saharan Africa. Nigeria operated Israeli drones from 2006 to 2009 to track the movements of Boko Haram.<sup>185</sup> Cameroon also operated small Israeli drones in the mid-2010s.<sup>186</sup> Ethiopia bought small drones from Ethiopia in 2011.<sup>187</sup> France operates drones across the region, especially near the Sahel in support of its enduring interests.<sup>188</sup> In this way, it operates similarly to the U.S. However, France has also sold some drones in the region. For example, in late 2019, France sold three drones to Mali.<sup>189</sup>

The key lesson here is that the demand for drones is so high that many selling countries have been able to provide solutions across the continent. The lack of U.S. drone sales in sub-Saharan Africa, especially juxtaposed against U.S. drone sales elsewhere, suggests that the U.S. is not interested in meeting its African partners' needs directly through sales or transfers. The U.S. continues to operate its own drones but otherwise appears content to allow other security providers to fill the need across the sub-continent. Turkey has received the most publicity from its recent efforts, but other providers exist within the space, and it appears that many countries are eager to acquire their products.

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<sup>183</sup> Kurpershoek, Valdez, and Zwijnenburg, 32.

<sup>184</sup> Kurpershoek, Valdez, and Zwijnenburg, 36.

<sup>185</sup> Kurpershoek, Valdez, and Zwijnenburg, 31.

<sup>186</sup> Kurpershoek, Valdez, and Zwijnenburg, 31.

<sup>187</sup> Kurpershoek, Valdez, and Zwijnenburg, 34.

<sup>188</sup> Kurpershoek, Valdez, and Zwijnenburg, 19.

<sup>189</sup> Kurpershoek, Valdez, and Zwijnenburg, 30.

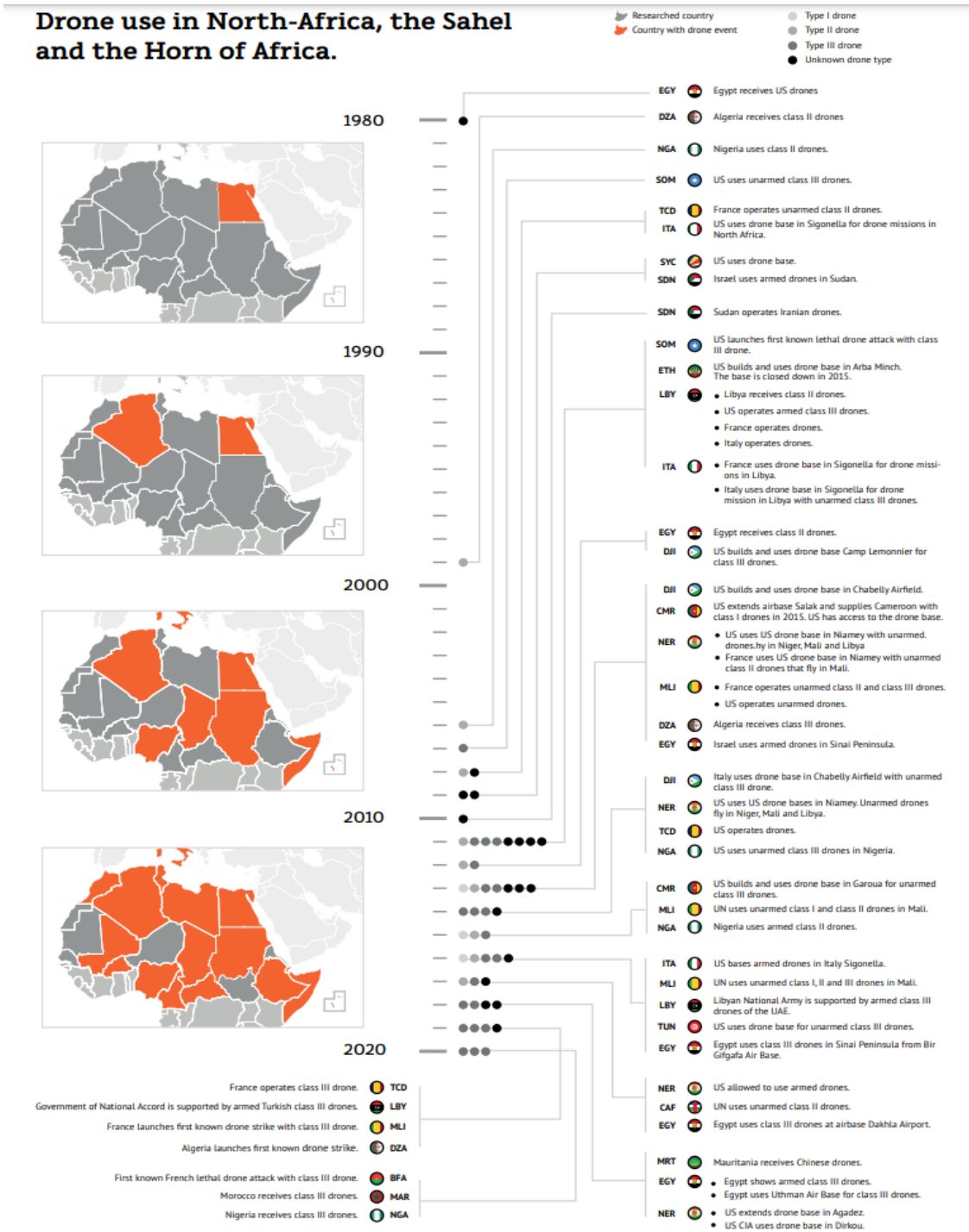


Figure 5. Overview of Drone Use in Africa<sup>190</sup>

<sup>190</sup> Source: Kurpershoek, Valdez, and Zwijnenburg. *Remote Horizons: Expanding Use and Proliferation of Military Drones in Africa*, 10.

## E. ETHIOPIA: CASE STUDY AND U.S. RESPONSE

Ethiopia is one of the prime examples of a nation procuring drones for its security issues in Sub-Saharan Africa. While other cases around the world, including Ukraine, Libya, and Azerbaijan, showcased the effectiveness of Turkish drones, Ethiopia made the first wide-scale demonstration and use of the drones in sub-Saharan Africa when government forces used them with their associated weaponry as part of their broad effort against the Tigray People Liberation Front (TPLF).

There have been several reports of civilian deaths in the conflict, and some evidence points to the use of munitions from these drones, including Turkish-made examples, in these attacks on civilians. In one case, bombs delivered from drones killed at least 59 people – all civilians – while sleeping in an empty school.<sup>191</sup> There were other reports of civilian casualties from drone strikes in other areas of the country, and evidence recovered from the sites again pointed to Turkish-made drones as the munition carrier.<sup>192</sup> Notably, observers assessed that only Ethiopian forces had access to drones, precluding the possibility of involvement from elsewhere.<sup>193</sup>

In response to the reports of Ethiopia using its Turkish drones to injure civilians, the U.S. government responded with congressional inquiries and executive action. Across the Turkish TB2's many export locations, the wreckage of downed drones has revealed that it contained many commercial parts originating from the U.S. and other Western countries.<sup>194</sup> This revelation, in turn, has raised the attention of the U.S. Congress. At the time, Representative Tony Cárdenas stated, "We've been paying close attention to Turkey's drone sales and how these weapons have been deployed around the world. I'm troubled about the destabilizing effects we're seeing and the human rights concerns that

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<sup>191</sup> Max Bearak, Meg Kelly, and Joyce Sohyun Lee, "How Ethiopia Used a Turkish Drone in a Strike that Killed Nearly 60 Civilians," *The Washington Post*, last modified February 7, 2022, <https://www.washingtonpost.com/world/interactive/2022/ethiopia-tigray-dedebit-drone-strike/>.

<sup>192</sup> Bearak, Kelly, and Lee, "How Ethiopia Used a Turkish Drone in a Strike that Killed Nearly 60 Civilians."

<sup>193</sup> Simon Marks, "Evidence from Civilian Bombing in Ethiopia Points to Turkish Drone," Politico, last modified January 25, 2022, <https://www.politico.eu/article/evidence-civilian-bombing-ethiopia-turkish-drone/>.

<sup>194</sup> Farooq, "U.S. Lawmakers Demand Federal Scrutiny of Turkey's Drones."

follow, especially in places like Nagorno Karabakh. We need a full accounting of the role U.S. manufactured parts are playing.”<sup>195</sup> President Biden also weighed in on the humanitarian concerns and human rights abuses with an executive order authorizing sanctions against individuals implicated in human rights abuses and targeting civilians in Ethiopia and the surrounding region.<sup>196</sup>

These sanctions seem to have done little to stem Ethiopia’s use of drones or Turkey’s willingness to sell them. Ethiopia’s drone fleet comprises models purchased from other nations, including the United Arab Emirates, China, and Iran.<sup>197</sup> While the 2022 ceasefire remains too recent to fully ascertain the effects of the sanctions, the year between U.S. sanctions and the ceasefire suggests that sanctions were not a driving factor. The Ethiopian government used drones to achieve rapid tactical victories, and its ability to acquire drones from Turkey and other nations shows that it was willing to take advantage of new technology and lower costs to achieve a tactical advantage on the battlefield.<sup>198</sup> The U.S. appears to have had little leverage to alter this conflict dynamic, and it also appears that the security relationship with Ethiopia will remain strained in the near future. The U.S. Congress and broader U.S. government will likely condition any future assistance on a return to recognizing human rights.

Though the U.S. did not directly contribute to the procurement or use of Ethiopia’s drones, the U.S. response in the humanitarian context highlights the complexity and difficulty of security assistance and capacity building. The U.S. chided Turkey over its sale and Ethiopia’s use of the drones, and Turkey has said little publicly on the matter, though Turkey has urged both sides to continue talks in the wake of the

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<sup>195</sup> Farooq, “U.S. Lawmakers Demand Federal Scrutiny of Turkey’s Drones.”

<sup>196</sup> The White House, *Executive Order on Imposing Sanctions on Certain Persons with Respect to the Humanitarian and Human Rights Crisis in Ethiopia*, (Washington, DC: The White House, 2021), <https://www.whitehouse.gov/briefing-room/presidential-actions/2021/09/17/executive-order-on-imposing-sanctions-on-certain-persons-with-respect-to-the-humanitarian-and-human-rights-crisis-in-ethiopia/>.

<sup>197</sup> Joshua Dunne, “Turkish Drones are Destroying Ethiopia’s Promise of Peace,” Australian Strategic Policy Institute: The Strategist, last modified October 25, 2022, <https://www.aspistrategist.org.au/turkish-drones-are-destroying-ethiopias-promise-of-peace/>.

<sup>198</sup> Joshua Dunne, “Turkish Drones are Destroying Ethiopia’s Promise of Peace.”

humanitarian ceasefire.<sup>199</sup> Humanitarian concerns were never at the forefront of Turkey's sales process. Instead, Turkey placed economic and political concessions from Ethiopia at the forefront of negotiations to complete the agreement. Ethiopia did not hide that it wished to use the drones in its fight against Tigray rebels, but again, humanitarian concerns were never at the forefront of any negotiations.

This highlights the complexity of security assistance within the broader field of international politics. According to Jessica Trisko Darden, "Foreign donors [...] often face scenarios in which a government receiving aid violates the very rights they are tasked to protect."<sup>200</sup> In addition, she states that governments undergoing transitions between authoritarianism and democracy often do not have guardrails and accountability mechanisms in place to ensure civilians are unharmed. The case of Ethiopia and the varied U.S. and Turkish approaches to humanitarian concerns are telling. While the U.S. lodged objections and attempted to hold Ethiopia to account with sanctions, even when it was not providing lethal aid, Turkey seemingly did little to alter its relationship with Ethiopia.

The situation becomes even more complex when considering Darden's notion that aid and support are generally fungible. The U.S. continues to provide humanitarian aid to Ethiopia with its recent announcement of \$331 million of new humanitarian assistance.<sup>201</sup> While the aid undoubtedly benefits those affected in Ethiopia, it also reduces the burden on Ethiopia to provide these services for the affected portions of its population. Though there is no direct linkage between Ethiopia receiving aid and using the savings to procure security-related equipment, the reduced need to provide some essential services for its people could conceivably allow Ethiopia to afford additional weapons.

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<sup>199</sup> "Türkiye Concerned Over Return of Ethiopia Conflict, Urges Talks," TRT World, August 25, 2022, <https://www.trtworld.com/africa/t%C3%BCrkiye-concerned-over-return-of-ethiopia-conflict-urges-talks-60138>.

<sup>200</sup> Jessica Trisko Darden, *Aiding and Abetting: U.S. Foreign Assistance and State Violence* (Stanford: Stanford University Press, 2019), 2.

<sup>201</sup> Antony J. Blinken, "\$331 Million in New Humanitarian Assistance for Ethiopia," U.S. Department of State, March 15, 2023, <https://www.state.gov/331-million-in-new-humanitarian-assistance-for-ethiopia/>.

Regardless of whether Turkey provides drones, finalizes business agreements, or gives other aid to Ethiopia, there may not exist a mechanism for ensuring Ethiopia does not use other resources to carry out questionable human rights attacks or practices. The U.S. has shown a willingness to place guardrails and accountability on its relationship, but Turkey has not. How the bilateral relationships continue between Ethiopia and these two contrasting partners will provide important clues on the effect of the measures on their influence.

## **F. KEY LESSONS**

The drone market within Africa continues to expand, and Turkey has been one of the most active exporters of drones across Sub-Saharan Africa. As a result, many countries continually ask Turkey about its drones, and interest remains high after positive tactical showcases across Africa and other regions.<sup>202</sup> This is notwithstanding any concerns over human rights violations, but the ire of the international community has primarily fallen on Ethiopia vice Turkey in the matter. This high level of interest has seemingly emerged independent of any particular U.S. actions in the region and represents a response to the continually evolving security landscape and available technology. Despite U.S. support in the region, countries are increasingly turning to Turkey, and others, to procure the capability for themselves.

Combined with U.S. restrictions over the sale and transfer of some of its technology, the incentive for purchasing drones and weapons elsewhere becomes even more substantial. Whether this radically changes the security relationship with the U.S. remains to be seen, especially considering U.S. strategy documents indicate a shift toward African partners procuring equipment and leading efforts to address security concerns. The U.S. commitment to humanitarian rights and adherence to international law also seemingly remains ironclad, as does its preference to primarily provide aid in the form of humanitarian and development packages. If countries continue a shift to partnering with Turkey, and others, to procure their weapons without such conditions levied upon them, it may lead to a dilution of U.S. influence across the region, especially

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<sup>202</sup>*The Economist*, “Turkey is Making a Big Diplomatic and Corporate Push Into Africa.”

in the continually evolving security assistance sector. Given the contemporary nature of this issue, additional research should look at developments in these linkages as the U.S. implements its policy and Turkey continues the sale of its drones.

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## V. CONCLUSION

### A. KEY FINDINGS

This research sought to answer at least three questions: (1) the motivations of the changing nature of Turkish foreign policy, especially in sub-Saharan Africa; (2) how and why Turkey fills a security assistance role in sub-Saharan Africa with its drone sales; and (3) the effect that Turkey's actions and a shifting security landscape may have on U.S. interests and policy in the region.

Turkish foreign policy shifted under the AKP and President Recep Tayyip Erdoğan. Turkey desires to project power beyond its near-periphery and has found a generally receptive sub-Saharan Africa. Turkey is rapidly growing its outreach across business, diplomatic, and political sectors, and Erdoğan often makes a personal effort to meet and host African heads of state. Security assistance is a growing component of Turkey's portfolio across the sub-continent. What began as a relatively modest presence mainly centered in Somalia has expanded across the continent. Turkey is rapidly increasing its military exports, and its most visible and in-demand products are its drones.

Turkey has capitalized on the publicity of its drones elsewhere to increase sales in sub-Saharan Africa. Often headlined by the Baykar Bayraktar TB2, Turkey has partnered with many sub-Saharan African nations to provide a capability where demand is consistently growing. One of the earliest examples was Ethiopia, but Turkish drones have become prevalent across the Sahel as countries look to diversify their security partnerships and quell armed insurgencies and VEOs. The purchasing nation is not the only party to benefit, however. Turkey often extracts concessions from purchasing countries that serve its economic and political interests, and this essential linkage underscores the importance of Turkey's efforts.

Finally, it appears that a shifting security landscape headlined by increased demand for drones and Turkey's drone diplomacy throughout sub-Saharan Africa have a nascent, though potentially significant, impact on U.S. interests and policy within the region. As this demand continues to grow and countries increasingly look elsewhere to

suppliers like Turkey, there may be a dilution of U.S. influence in the security space. The shift in the security landscape is an additional finding of this research. Given drone technology's ongoing and evolving nature, further research may consider exploring this change in-depth.

Moreover, as the U.S. continues to redefine its role in sub-Saharan Africa and looks to partner with nations, it may find that countries increasingly look to diversify their security patrons to meet their needs. While Turkey's entrance into the drone market has been widespread, other countries also supply sub-Saharan Africa with capable drones. With the U.S. preferring to operate drones instead of selling them to partners on the continent, a disconnect may emerge between the U.S. and its partners.

## **B. FUTURE RESEARCH**

As of early 2023, news about Turkey's drone diplomacy throughout sub-Saharan Africa continues to emerge. In March, TB2s were photographed at Mobido Keita International Airport in Mali with Mali's flag painted on the tail.<sup>203</sup> With a purchase apparently complete, Mali is likely to use drones to continue its fight against VEOs. With French forces having departed from the country, it appears Mali is turning to different partners, like Turkey, to fulfill its security needs.

Examples like these highlight at least two critical points. First, Turkey continues to take advantage of a changing security landscape and recognizes that countries have security requirements that Turkish drones can help solve. In addition, Turkey is adept at providing these drones and other security assistance alongside, or in lieu of, other traditional arms suppliers, such as France or even the U.S. While the details of the Mali drone agreement are not public, the terms of the agreement may indicate a benefit for Turkey beyond the revenue generated from the sale. Regardless, Turkey continues to deepen its reach and influence across sub-Saharan Africa, and the demand for its drones appears only to strengthen.

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<sup>203</sup> *Presidence Mali (@PresidenceMali)*, "Le Président de la Transition, SE le Colonel @GoitaAssimi, Chef de l'État, Chef Suprême des Armées, a présidé, ce jeudi, la cérémonie de remise officielle d'aéronefs militaires, au Pavillon présidentiel de l'aéroport international Président Modibo KEÏTA," *Twitter*, March 16, 2023, 9:41am, <https://twitter.com/PresidenceMali/status/1636407472478130177>.

Second, the ongoing nature of Turkey’s drone diplomacy in sub-Saharan Africa suggests that this topic would benefit from additional research, especially as other deals between Turkey and purchasing nations materialize or details from previous agreements highlight the concessions Turkey may extract from a nation, for example. Moreover, with Turkey’s elections set to be held in May and Erdoğan facing a somewhat concerning political landscape, domestic politics may force changes that reverberate throughout all facets of the Turkish government.<sup>204</sup> With Erdoğan and the AKP connected so closely to facets of security relationships in sub-Saharan Africa, any change inside of Turkey will likely affect foreign policy outcomes.

The contemporary nature of U.S. policy in sub-Saharan Africa is also worth monitoring. With a new strategy, a concerning security environment in the Sahel, and the continued pivot to Asia, the U.S. presence will have to adapt to ever-changing requirements and many countries looking to manage their increasingly concerning security issues. With Mali, and others, looking elsewhere for security concerns, the U.S. must continually strive to define its goals and position itself as a partner of choice within the region.

Finally, as warfare evolves and drones play an important role in conflicts across sub-Saharan Africa, additional research may uncover how capabilities once reserved for larger powers enable mid-tier and smaller powers to achieve their security goals. Turkey and its current customers are at the forefront of this effort as of early 2023. However, additional research would add valuable insight to a growing body of literature attempting to quantify new technology’s effect on changing security landscapes.

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<sup>204</sup> Jonathan Spicer and Ece Toksabay, “Polls Show Erdogan Lags Opposition by More than 10 Points Ahead of May Vote,” Reuters, last modified March 13, 2023, <https://www.reuters.com/world/middle-east/polls-show-erdogan-lags-opposition-by-more-than-10-points-ahead-may-vote-2023-03-13/>.

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