Gulf Research Centre Cambridge

Knowledge for All

17th Gulf Research Meeting

Cambridge, 20-22 July 2027

Workshop No. 8

From Procurement to Alliance: Mapping GCC- Türkiye Defense Industry and Armament Cooperation

1. **Directors**

Ali Bakir
Qatar University

Rashid Al-Mohanadi
Qatar's Foreign Ministry & Center for International Policy Research

2. **Abstract**

The burgeoning partnership between the Gulf Cooperation Council (GCC) states and Türkiye in the defense industry represents a significant geopolitical, defense, and economic development in the Middle East. The importance of this domain has only increased following the 2026 Israel-US-Iran war, the formation of the "Mecca Defense Alliance" between Saudi Arabia, Türkiye, and Pakistan, and the Badr MoU between Qatar, Türkiye, Pakistan, and Indonesia. Taking these developments into consideration and their impact on Gulf security, this workshop will explore the multifaceted dimensions of this security and defense cooperation between the GCC states and Türkiye, focusing on arms transfers, defense-industry, and military cooperation between them. As GCC nations accelerate their efforts to localize defense production and diversify their military suppliers, Türkiye has emerged as a key partner, offering advanced and battle-proven technologies, forging partnerships, and transferring technology. This workshop will analyze the nature, drivers, opportunities, challenges, and future trajectories of this evolving relationship, examining its impact on the regional balance of power, the role of traditional arm suppliers, and the development of indigenous defense capabilities in the Gulf.

3. Context

The defense and security relationship between the Gulf Cooperation Council (GCC) states and Türkiye has undergone a significant transformation since 2002, entering a new era of strategic cooperation, particularly after the Al-Ula agreement in 2021, the Mecca Defense Alliance, and the Badr MoU in 2026. This partnership has evolved beyond traditional arms sales to include joint development, technology transfer, co-production, and alliance, reflecting a mutual commitment to enhancing strategic autonomy and regional security. Historically, GCC states relied heavily on Western arms and security guarantees, primarily from the United States. Concerns regarding the reliability of these partnerships have been underscored by several significant events: the 2017 GCC crisis, the attacks on Saudi oil facilities in 2019, assaults on Emirati infrastructure in 2020, Iranian and Israeli attacks on Doha in 2025, and, most notably, Iranian aggression against the GCC states during the Israel-US-Iran war of 2026. These incidents have prompted the Arab Gulf nations to diversify their defense alliances and arms imports and increase defense localization efforts.

Türkiye, with its rapidly advancing defense sector, emerged as a capable and reliable partner. The international recognition of Turkish combat-proven platforms, particularly its unmanned systems, combined with Ankara's willingness to transfer technology and its openness to foster strategic partnerships with Islamic countries—especially concerning strategic projects such as the fifth-generation fighter jet, KAAN— has made Türkiye an attractive alternative for GCC states. This gains more importance as these nations seek to diversify their defense ties and arms imports, enhance their military capabilities, and reduce their dependency on traditional suppliers. Accordingly, a surge in arms agreements occurred between 2021 and 2026. This cooperation has broadened from simple procurement to establishing a robust defense-industry partnership. Leading Turkish defense companies like ASELSAN, ROKETSAN, HAVELSAN, BAYKAR, TAI, ARCA, FNSS, ASFALT, MKE, STM, BMC, and others have opened offices or formed partnerships in the GCC. High-level defense agreements and joint ventures have become more common, exemplified by the landmark agreement between Türkiye and Saudi Arabia for the co-production of Turkish drones. The UAE and Qatar have also become key partners, making significant investments in Turkish defense firms and engaging in joint development projects. These "mega agreements" signify a long-term commitment to strategic collaboration, focusing on joint production and technology transfer to develop indigenous defense capabilities in the Gulf.

The strategic rationale for this partnership is multifaceted. For GCC states, it provides access to advanced military technology, opportunities for technology transfer to support their own defense industries, and a more diversified supply chain. For Türkiye, the GCC is a lucrative market and a strategic partner with shared goals of regional stability. The

economic, military, and security benefits foster a symbiotic relationship that serves both sides. However, challenges remain. While GCC states accounted for a significant portion of Türkiye's defense exports, the total value is still small compared to the Gulf's overall arms imports from Western allies and in relation to Türkiye's GDP. This indicates that substantial effort is needed to increase and institutionalize imports and investments in joint projects. Shared security concerns and mutual economic and strategic benefits have consistently driven the relationship forward. As the Middle East witnesses a period of profound change following the 2026 Israel-US-Iran war and the formation of the Mecca Defense Alliance, and the Badr agreement, the GCC-Türkiye defense partnership is poised to play an increasingly crucial role in shaping the regional security architecture.

4. Workshop Focus/Objectives

Key objectives:

-To examine the institutional frameworks and cooperation models governing GCC-Türkiye defense industry partnerships. This includes analyzing the various forms of cooperation—from traditional arms sales to joint ventures, co-production agreements, technology transfer arrangements, and offset programs if any—and how these models differ across individual GCC states based on their specific defense industrial strategies and capabilities.

- To identify and analyze the key defense industry actors and stakeholders. This involves mapping the Turkish defense companies (such as ASELSAN, ROKETSAN, HAVELSAN, BAYKAR, TAI, ARCA, STM, BMC, FNSS, ASFALT, MKE, and others) and their GCC counterparts (including SAMI, EDGE Group, Qatar's Barzan Holdings, and other state-owned and private entities), examining their roles, capabilities, and the nature of their partnerships.

- To assess the scope, scale, and trends of arms transfers and defense trade. This includes a detailed quantitative and qualitative analysis of arms export data, examining the types of military systems being transferred (UCAVs, naval systems, land platforms, etc.), their monetary value, delivery timelines, and how these patterns vary across different GCC states. The analysis will also explore the defense economic interactions.

- To analyze the competitive landscape and Türkiye's position vis-à-vis other arms suppliers to GCC states. This involves examining how Turkish defense exports to GCC states compete with traditional suppliers (United States, France, Germany, United Kingdom, Italy) and potential competitors (China, India, South Korea, Israel, Sweden, Pakistan, Russia) in the GCC market, analyzing competitive advantages, market share dynamics, and the factors influencing GCC procurement decisions.

- To examine the differentiated approaches of individual GCC states toward Turkish defense cooperation. This study will include both individual case studies and comparative analyses, highlighting how Saudi Arabia, the UAE, Qatar, Kuwait, Oman, and Bahrain engage with the Turkish defense industry. It will focus on the varying scales of cooperation, preferred models of collaboration, and the domestic factors—such as industrial policies, threat perceptions, and alliance relationships—that influence these approaches.

5. Paper Focus/Topics

This workshop invites papers that provide detailed/specific theoretical, conceptual, empirical analysis, content analysis, case studies, or comparative analysis of the GCC-Türkiye defense industry cooperation and arms transfers rather than general information or assessments. Authors can use qualitative or quantitative methods.

We particularly welcome contributions that offer specific insights into this partnership. Authors are encouraged to utilize primary sources, industry data, archives documents, and field research, interviews with officials, experts, and executives, as well as data obtained from polls and questionnaires, to support their investigations and analyses.

Potential topics for papers include, <u>but are not limited to</u>:

1. Defense Industry Cooperation Models and Mechanisms:
   - Comparative analysis of cooperation frameworks: traditional arms sales vs. joint ventures vs. co-production agreements vs. technology transfer arrangement
   - Analysis of offset programs--if any--licensing agreements, local assembly arrangements, and manufacturing partnerships
   - Case studies of successful and unsuccessful cooperation models across different GCC states

2. Corporate Actors and Institutional Mapping:
   - Analysis of GCC defense industry entities (SAMI, EDGE Group, Barzan Holdings, Kuwait's KIO, etc.) and their partnerships with Turkish ones (ASELSAN, ROKETSAN, HAVELSAN, BAYKAR, TAI, STM, ARCA, FNSS, ASFALT, MKE, etc.)

3. Arms Transfers: Quantitative/Qualitative Analysis and Trends:
   - Comprehensive analysis of Turkish arms exports to individual GCC states
   - Examination of export trends by weapon system categories (UCAVs, naval platforms, land systems, electronics, etc.)
   - Monetary value analysis and market share assessment of Turkish defense exports to the GCC

4. Competitive Landscape and Market Dynamics:

- Türkiye's competitive position against traditional suppliers (US, France, Germany, UK, Italy, etc) in the GCC market or potential ones (China, India, South Korea, Israel, Pakistan, Sweden, etc).
- Comparative advantages of Turkish defense products: cost-effectiveness, technology transfer willingness, political conditions.
- Impact of geopolitical factors on supplier selection and market access.

5. Country-Specific defense Cooperation Patterns:
   - Saudi Arabia, UAE, Qatar, Kuwait, Bahrain, and Oman. (individual case studies)
   - Comparative analysis of procurement preferences and cooperation modalities across GCC states

7. Defense Economics and Financial Mechanisms:
   - Economic impact assessment of Turkish defense cooperation on GCC economies.
   - Analysis of financing mechanisms: government-to-government loans, export credits, private financing

If authors are not sure about the topic, they can reach out to the directors and coordinate on this matter.

6. Publication Plans

Following the workshop, we intend to pursue the publication of the papers as: an edited volume with a reputable publisher (Springer, Routledge, Palgrave Macmillan, or others), or (ii) a special issue in a high-impact peer-reviewed journal (Q1)-(Q2), and for all remaining papers (iii) an article in a peer-reviewed journal, or (iv) GRC paper. The specific publication venue will be determined based on the thematic coherence and quality of the papers. We already have the potential venues, and we have communicated the idea and discussed it with several editors who gave positive initial responses. The workshop directors will work closely with the authors to prepare their papers for publication and ensure a high-quality final product.

To get a glimpse of our previous publications, you can read our special issues in (Q2) journal: The GCC States' Strategic Pathways to Defence Industry Localization https://www.tandfonline.com/toc/cdan20/41/4 ; or in (Q1) journal: GCC States in Transition: Defense, Security, and Military Adaptation in an Era of U.S. Decline https://doi.org/10.1177/03043754251399856 ; or our edited volume in Palgrave Macmillan: The Gulf Cooperation Council (GCC) States Amid the Iran–Israel Rivalry https://link.springer.com/book/9789819217014

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C.

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8. Paper Guidelines

Read GRM guidelines, it is mandatory.

- Aim for 8500 words manuscript inclusive of everything. Do not exceed 10,000 in any case (you should consult with the directors though).
- Do NOT use AI to generate any content for your paper. Doing so will result in disqualification.
- Use British (-ise) spelling style consistently throughout your manuscript.
- Use double quotation marks, except where "a quotation is 'within' a quotation".
- Note that long quotations should be indented without quotation marks.
- Make sure that the submitted paper is clearly structured and is as close to being ready for publication as possible.
- Please note that once we move to the publishing stage, we may need to change the format depending on the targeted place.

9. Workshop Directors

Dr. Ali Bakir is a Research Assistant Professor of International Affairs, Security, and Defense at Qatar University's Ibn Khaldoun Center, a partner project director of NATO's project "Strategic Foresight Analysis for Emerging Challenges in the Gulf Region", an associate editor of (Q1) Journal of Alternatives, and Senior Nonresident Fellow at the Middle East Council on Global Affairs. Bakir is also a former Senior Nonresident Fellow at the Atlantic Council's "Scowcroft Middle East Security Initiative" and Middle East programs, a former Task Force Member of the "Center for Strategic and International Studies" (CSIS) in Washington, DC. As a senior foreign policy and security analyst and consultant, Bakir has over 20 years of professional experience working with senior officials, decision-makers, and stakeholders for governmental, non-governmental, and private sector institutions.

Before joining Qatar University, he served for 6 years under Qatar's Foreign Ministry as a Senior Adviser at Qatar's Embassy in Ankara. Additionally, he was the Head of the "Gulf Studies Unit" at the Middle East Studies Center, Senior Researcher at the Center for MENA Studies of the International Strategic Research Organization, and a Researcher and Senior Editor at (AIWA) Group for defense and economy.

Bakir writes extensively in English, Arabic, and Turkish platforms on the geopolitical and security trends in the MENA region. His research interests include great power politics in the Middle East, small states' behavior. His work focuses on the foreign, security, and defense policies of the Gulf countries and Türkiye, as well as Türkiye-Arab/Gulf relations, Gulf security, great power competition in the Middle East, the behavior of small states, and the geopolitics of the MENA region and the Eastern Mediterranean. He had his education,

fieldwork, and work experience in several countries, including Kuwait, Jordan, Iraq, Syria, Lebanon, Türkiye, and Qatar.

Rashid Al-Mohanadi is the Head of Academic and Research Relations at the Ministry of Foreign Affairs of the State of Qatar, where his work focuses on policy research partnerships, engagement with think tanks, and Track 1.5 and Track 2 diplomacy. He is also Vice President of the Center for International Policy Research in Qatar and a Non-Resident Fellow at the Middle East Council on Global Affairs. His research and policy interests include small-state strategy, Gulf and regional security, defense policy and defense-industrial development, geopolitics, and strategic affairs. Rashid began his professional career in the energy industry before moving into the defense sector, where he spent the majority of his career. Across these roles, his work has covered strategic partnerships, business development, acquisitions, research and development, and commercial strategy. During his career, he has also undertaken consulting work, particularly in political risk and security advisory, supporting both government and commercial clients. Rashid holds a First-Class-Honours BEng in Electronic Engineering from the University of Surrey, an MA in Critical Security Studies from the Doha Institute for Graduate Studies, and an MA in Defence and Security Studies from Joaan bin Jassim Military Academy. He is a regular speaker at international policy and strategic affairs forums.