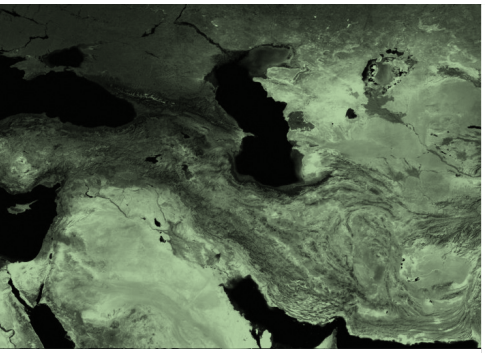
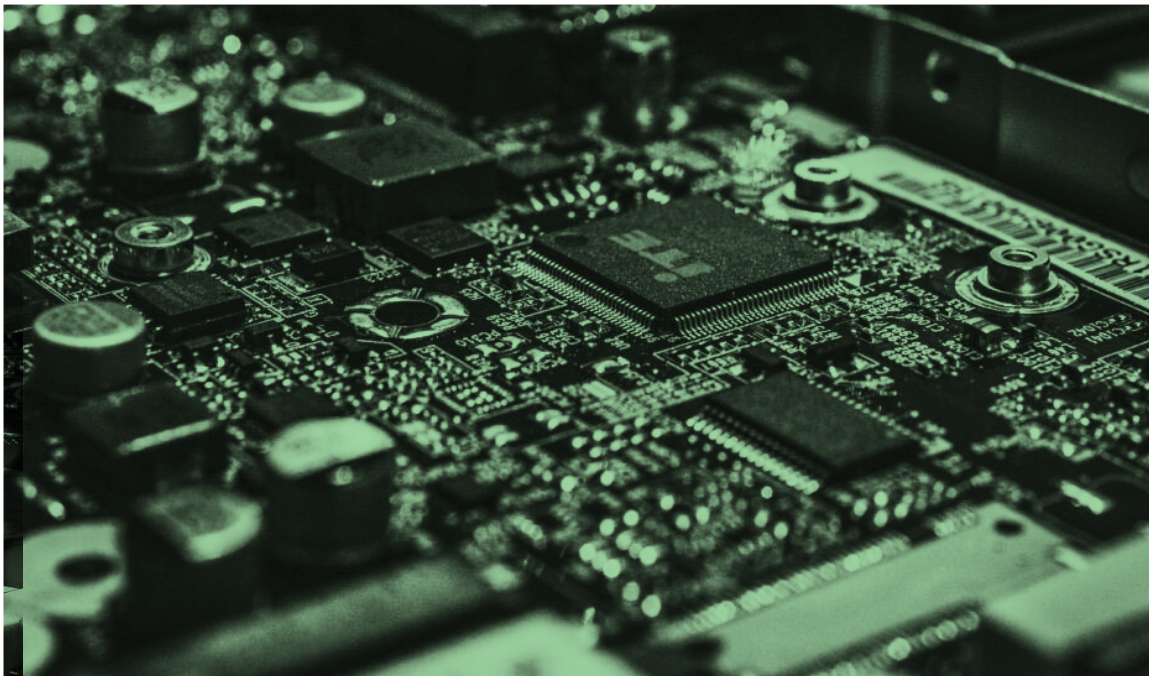
The Defense Journal

Atlantic Council
IN TURKEY

BY ATLANTIC COUNCIL IN TURKEY | ISSUE #5



TRANSATLANTIC RELATIONS AND A REGION IN FLUX



Atlantic Council
IN TURKEY

The Atlantic Council in Turkey aims to promote dialogue and strengthen transatlantic engagement with the region through research, programming and high-level discussion forums to address critical issues around energy, economics, business, defense and security.

Honorary advisory board

The Defense Journal by Atlantic Council in Turkey's honorary advisory board provides vision and direction for the journal. We are honored to have Gen. Wesley K. Clark; Amb. Paula J. Dobriansky, Ph.D.; Gen. James L. Jones; Franklin D. Kramer, Amb. Douglas E. Lute; and Dov S. Zakheim.

Gen. Wesley K. Clark

Chairman and CEO of Wesley K. Clark & Associates & Board Director, Atlantic Council

Amb. Paula J. Dobriansky, Ph.D.

Senior Fellow at Harvard University JFK Belfer Center for Science & International Affairs; former Under Secretary of State for Global Affairs (2001-2009)

Gen. James L. Jones

President, Jones Group International; Former National Security Advisor to the President of the United States; Executive Chairman Emeritus, Atlantic Council

Franklin D. Kramer

Distinguished Fellow & Board Director, Atlantic Council & Former Assistant Secretary of Defense

Amb. Douglas E. Lute

CEO, Cambridge Global Advisors & Board Director, Atlantic Council

Dov S. Zakheim

Board Director, Atlantic Council & Former US Under Secretary of Defense

CONTENTS

Page 5: U.S. Green Berets from various special forces groups pose for a photo with Turkish Army and Air Force joint terminal attack controllers while two U.S. Navy F/A-18 fighters fly overhead at a training area near Konya, Türkiye, August 24, 2023. U.S. SOF joint terminal attack controllers (JTAC) conducted a bilateral call for air support exchange with Turkish Air Force and Army members near Konya, Türkiye to increase Turkish JTAC capabilities and further interoperability between NATO allies. Source: U.S. Army photo by Sgt. 1st. Class Adrian Borunda

Page 9: Macro photography of black circuit board, Source: Alexandre Debiève, Unsplash

Page 15: A drone view shows people waving flags adopted by the new Syrian rulers during celebrations in Umayyad Square, after the ousting of Syria's Bashar al-Assad, in Damascus, Syria, December 20, 2024. Source: REUTERS/Amr Alfiky TPX

Page 19: 240901-N-NT298-1001 AEGEAN SEA (Sept. 1, 2024) The amphibious assault ship USS Wasp (LHD 1), transits into Izmir, Türkiye, Sept. 1, 2024, for a scheduled port visit. Wasp is conducting operations in the U.S. Naval Forces Europe and Africa (NAVEUR-NAVAF) area of operations as the flagship of the Wasp Amphibious Ready Group (WSP ARG)-24th Marine Expeditionary Unit (MEU) Special Operations Capable (SOC). The WSP ARG-24th MEU (SOC) is on a scheduled deployment to the NAVEUR-NAVAF area of operations, supporting U.S., Allied and partner interests in the region, including in the Eastern Mediterranean Sea, to continue promoting regional stability and deterring aggression. Source: U.S. Navy photo by Mass Communication Specialist Seaman Apprentice Soren V. P. Quinata

Page 23: Source: USGS on Unsplash

Page 26: Source: U.S. Department of Defense

Page 31: Baykar CEO Haluk Bayraktar with Kizilelma drone in the background. Source: Baykar.

FOREWORD

By Rich Outzen & Can Kasapoglu

Dramatic events altered the geopolitical landscape, affecting Turkey, the United States, and NATO in late 2024 and early 2025. The election of Donald Trump as the forty seventh president of America, a ceasefire in Gaza after months of showdown between Israel and Iran's Axis of Resistance, and the collapse of the Assad regime in Syria have challenged many assumptions and regional political-military considerations. The fifth issue of the Defense Journal assesses key dynamics as we enter a new era. The Defense Journal team examines the rise of the hyperwar concept via military applications of artificial intelligence and the frontier of development for robotic systems. We also look at trends in key US policy concerns in the region to the south of Turkey, including Israel and Syria. If the first months of the second Trump administration are any indication, rapid change and a high tempo in US foreign policy decisions affecting Washington, Ankara, and their shared interests across several regions is the new normal. The Editorial Team hopes you find these contributions interesting and useful.

Rich Outzen & Can Kasapoglu, *Defense Journal* Co-managing editors, .

Rich Outzen

Can Kasapoglu

2024 IN THE REAR VIEW

By Rich Outzen

2024 brought a host of developments and changes in the security and defense environment facing the United States, Turkey, and their NATO partners. Some of these dynamics were political and geopolitical in nature, some operational, others military and technical. As the Defense Journal assesses and describes the state of the Alliance in 2025 for its readers, a brief retrospective on the year just passed and its impact provides a part of the necessary context.

Geopolitical shaping events

Momentous geopolitical events since our winter issue have included the advent of Donald Trump's second term as US president, the collapse of the Assad regime in Syria, and the apparent revelation in Europe that conventional military defense is a sovereign responsibility that cannot be outsourced in perpetuity. These events have had significant implications for the security of NATO, Turkey, and the United States.

Trump's return has had several immediate effects on the United States (and thus the global) security environment. His approach narrows the US global mission from maintaining a liberal world order to pursuing US national interests, while adopting a tone of strategic ambiguity toward both rivals and allies. He has simultaneously directed reform of the US military to reemphasize combat readiness and lethality while minimizing social or ideological programs. As commander in chief, Trump has directed US soldiers to conduct counterterror strikes in places like Somalia and Yemen even as his negotiators seek to defuse conflicts in Ukraine, Gaza, and elsewhere.

The fall of Bashar al-Assad after an eleven-day rebel offensive reshaped the strategic map of the Middle East. Iran lost a valuable strategic position in its multidimensional "resistance" against Israel and Western influence. Russia lost its sunk investment in Assad and a degree of its influence in the Middle East. Turkey has gained greater stability on its southern border, close defense and intelligence ties with the new Syrian authorities, and prospects for expanded regional trade and a leading role in Syrian reconstruction. The challenges of stabilizing Syria, and tensions between Israel and Turkey

stemming from their respective threat perceptions, have no immediate or apparent solution, and will require deft diplomacy to manage.

Shifts that might have attracted more attention in other times were easy to miss, but still noteworthy in terms of global security. China and Russia took steps to bolster the military junta in Myanmar that is teetering on the edge of collapse against a rebel coalition. Battles between the Sudanese army (backed by Egypt, Turkey, Qatar, and Saudi Arabia) and the antigovernment Rapid Support Forces (supported by Russia and the United Arab Emirates) have shifted decisively in favor of the army, though not yet presaging an end to the civil war. The war in Ukraine grinds on amid serious attempts by Trump to forge a ceasefire. Early 2025 continues to be an era of persistent conflict and great power competition, but one with dramatic developments that will echo throughout this and future years.

Strategic alliance development

International patterns of alliance and armament over the past half-year have reflected the weight of geopolitical changes noted above. Deep and effective US support to Ukraine's defense against Russian aggression has led to a tighter convergence of what has been referred to as the axis of upheaval, with China, Iran, and North Korea sending weapons, supplies, and even soldiers to aid the Russian war effort. A dozen or more other countries have provided diplomatic support to Moscow, but these three have become critical suppliers of weapons and cash for the Kremlin. This is a trend that began before 2024, but has only accelerated in recent months.

The global arms market continues to shift in other significant ways. The United States in 2024 cemented its leading position in arms exports, accounting for 43 percent of global exports. Russian exports have sharply decreased as domestic production has been consumed by the ongoing war in Ukraine. Italy and Turkey have more than doubled their national shares of global exports over the past several years (2 percent to 4.8 percent for Italy and 0.8 percent to 1.7 percent for Turkey). Five Turkish defense firms rank among the one hundred largest in the world—and a sixth, Baykar, would almost certainly be high on the list if all of its sales data were publicly released. Only the United States, China, Germany, and the United Kingdom match or exceed this number. Of particular note has been the continued rise in demand for Turkish armaments from Gulf countries, especially Saudi Arabia, the UAE, and Qatar.

Europe, for its part, has shown signs of finally getting serious about developing its own conventional military deterrent vis-à-vis Russia—or at least talking about doing so. Shocked by Trump's heavy-handed conditionality on future aid to Ukraine, Brussels and its member states have drawn up plans for massive new defense spending and other deterrent steps—if taxpayers and military-age youth prove willing. Yet the European Union's initial formulation of deterrence against Russia independent of Washington and without integrating Turkish geography, military capabilities, and strategic resources does not inspire confidence, especially given the long years needed to restore defense industrial capacity even assuming consistent commitment. European firms and national leaders would do well to welcome Turkish contributions to European defense planning and resourcing both in NATO and

in EU planning by following through on plans to sell Ankara Eurofighters and encouraging more collaboration like that between Italy's Leonardo and Turkey's Baykar.

While the past half year has demonstrated volatility at the geopolitical and political levels, it has brought multipolarity and diffusion of power at the strategic level. This has played out in the evolution of alliances and the flow of arms and trade more broadly. In mid-2024 dualistic constructs (autocracy versus democracy, the US-led Alliance against an axis of evil) retained some utility. The current environment is messier, with issue-specific coalitions and transactional diplomacy creating a kaleidoscope of rivals, partners, and targets that, for now at least, deny predictable patterns and lead some to question the credibility of the international system's most potent actor.

Operational trends

As geopolitics and alliances continue to evolve, so, too, does war in operational terms. In a world with ongoing "hot wars" in Ukraine, the Middle East, Africa, and elsewhere, several discernible trends can be identified. These include diminishing returns for artillery as seen in Ukraine, failure to achieve military victory through ground maneuver forces for Russia and Israel, and the fragility of lightly armed proxy forces in various theaters.

Russia since 2022 has compensated for shortcomings in its infantry, armor, and air forces through reliance on superior tube and rocket artillery, exacting a heavy toll on Ukrainian defenders in the process. Yet in late 2024, losses among Russian artillery units rose as Ukrainian drone tactics and counterbattery fire became more effective. While Russia still outproduces NATO in artillery ammunition and continues to fire it at prodigious rates, its advantage is decreasing in relative terms.

Russia has continued to advance at high cost to try and consolidate control over the nearly 20 percent of Ukrainian territory it occupies, but has failed to end the war via ground maneuver after three years. The difficulty of ending wars through ground maneuver even against inferior opponents can also be seen in Gaza, where operations which have continued for eighteen months are not yet meeting the stated war goals of military and political leaders. Both the Russian and Israeli campaigns reflect the historical difficulty of reconciling the political nature of conflict termination with the operational conduct of wars, and a resultant tendency for destructive wars to yield stalemate when that task remains incomplete.

The recent period produced impressive operational results in other cases, notably Israel's campaign against Iran's regional proxy network and the Sudanese army's efforts to regain control of the national capital region from the insurgent Rapid Support Forces (RSF) militia. In late 2024 Israel crippled Lebanese Hezbollah and struck Iranian-supported militia targets in Syria and Iraq during an audacious campaign involving air strikes, ground maneuver, and exploding cellphones. Between November 2024 and March 2025 the Sudanese Army routed the RSF from Khartoum and other areas in central Sudan. The RSF had been supported by a number of foreign sponsors, including the United Arab Emirates and several other regional countries, but ultimately failed to achieve local or regional legitimacy—as had the Iranian proxy groups in Lebanon and Syria, and arguably in Iraq and Yemen as well. The past several months have badly undermined the notion popular over the past decade that proxy wars can effectively "enable intervention on the cheap."

Military technical developments on the horizon

Over the past several months sixth-generation fighter aircraft have moved from concept to reality. China flew two prototypes in December 2024, one produced by Chengdu Aircraft Industry Group and the other by AVIC Shenyang Aircraft. US prototypes for a Next Generation Air Dominance (NGAD) aircraft have been under evaluation since 2020, but in March 2025 the Boeing F-47 was officially selected as the program's platform. A half-dozen other countries have done some sixth-generation work—integrating advanced stealth, artificial intelligence, manned-unmanned teaming, and other advanced technologies—though even for those with the deepest pockets, fourth- and fifth-generation aircraft will be mainstays for the foreseeable future.

Artificial intelligence is a growing element in military planning and readiness. While the United States and many of its allies have endorsed the Political Declaration on Responsible Military Use of Artificial Intelligence and Autonomy, many potential adversaries and rivals have not. Military applications for

AI focus at present on information processing, threat identification, and decision-making, areas in which the United States has relative advantage. The Department of Defense's Defense Innovation Unit is implementing a project, Thunderforge, to deploy such capabilities to headquarters in Asia and Europe. The military services each have designated units to test concepts and systems related to AI in the field.

The drive to develop effective defenses against small unmanned aerial systems (UAS) has gained urgency with the continued broad proliferation of cheap, easy-to-use, lethal UAS around the world. The December 2024 Department of Defense adoption of a classified strategy to accelerate counter-UAS development signals the rising criticality of the need for cost-effective and combat-effective counters to the cheap and plentiful threat. This is an area ripe for technical development and fielding in the near future.

Adaptive Alliance

The shifting dynamics at all these levels—geopolitical, strategic, operational, and technical—shape the contours of defense and security challenges for the United States and its NATO allies. These are certainly challenging times, yet the Alliance has endured for over seven decades through other chaotic and difficult periods because the basic value proposition of mutual defense among the members remains sound. Secretary General Mark Rutte strikes the right tone with his assessment that "there is no alternative to NATO" for either the United States or its partners, and that despite frictions related to burden sharing, domestic politics, and sometimes divergent national interest, NATO's summit in The Hague in late June will show the Alliance evolving rather than dissolving.

Rich Outzen is a geopolitical consultant and nonresident senior fellow at the Atlantic Council in Turkey with thirty-two years of government service both in uniform and as a civilian. Follow him on X @ RichOutzen.

HYPERWAR, ARTIFICIAL INTELLIGENCE, AND *HOMO SAPIENS*

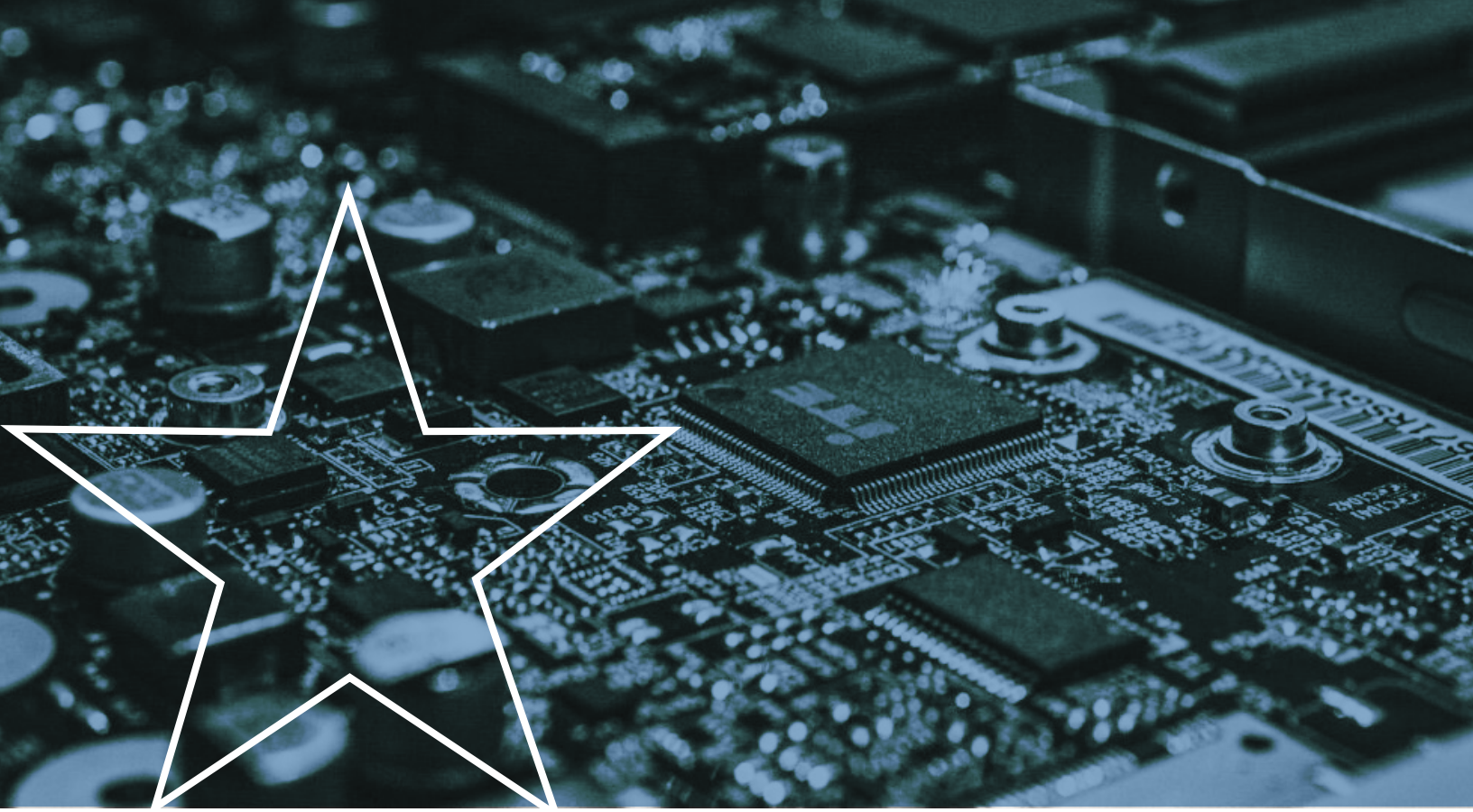
By Can Kasapoglu

Rethinking the modern neuroanatomical charts of warfare

According to Napoleon, an army walks on its stomach. War, nonetheless, chiefly revolves around cognitive functions. Take a nineteenth-century Napoleonic artillery officer calculating the range of his guns to the target, for example. The officer's prefrontal cortex hosts three major components: control, short-term memory, and arithmetic logic. This prefrontal exercise operates on the data provided by two other sources: a premotor-parietal top-down system optimized to update and continuously transform external data into an internal format, and a hippocampal bottom-up system to serve as an access code to memory from previously acquired knowledge or to detect novel information. In other words, an army fights on mathematical military data processing systems of the parietal and prefrontal brain regions. No matter how technological improvements have run extra miles to the present day, this cognitive formulation has not changed even on the margins. A contemporary F-35 pilot, assessing the processed situational data harvested by the aircraft's AN/AAQ-37 Distributed Aperture System showcased on the helmet-mounted display, uses precisely the same biological decision-making algorithms as the Napoleonic artillery officer posited above—albeit on steroids and with a high-performance computing edge.

Today, mankind stands on the eve of a great change in this oldest cognitive tradition of warfighting. For the first time in military history, parietal and prefrontal brain regions may take a back seat in deciding concepts of operations and concepts of employment, perhaps even strategic planning prior to combat operations, while artificial intelligence will likely assume the lead. With the rise of autonomous weapon systems in distributed battlegrounds, the neuroanatomical outlook of warfare may be evolving into a new reality.

Smart digital algorithms and autonomous robotic warfighters are poised to replace not only the muscles but also the brains of warfare. This can occur because they can replicate electronically what our



brains do in the biological realm and thus can overtake us by simply performing better, not differently. Robotics and artificial intelligence mimic the core characteristics of nature. Machine-learning and artificial neural networks are good examples of this mimicry. Our everyday AI features of facial and voice recognition and smart internet search predictions function in the virtual world much as they do in the human brain. Likewise, swarming is not merely a robotic function. Birds, bee colonies, and even bacteria swarm. AI might be "smarter" than humans through faster processing of effective mimicry, and robots similarly may swarm in a more coordinated and agile manner than biological agents.

AI and hyperwar: Data, robots, and satellites

In their 2017 Proceedings article released by the US Naval Institute, US Marine Corps General John Allen and high-technology entrepreneur Amir Husain described "hyperwar" as an emerging type of armed conflict that significantly reduces human decision-making. In the new type of wars, the authors argued, Homo sapiens' cognitive function of decision-making will nearly disappear from the OODA loop (observe, orient, decide, act). Autonomous swarms of robotic warfare systems, high-speed networks married to machine-learning algorithms, AI-enabled cyber warfare tools, and miniaturized high-powered computing are likely to assume the lead roles in fighting wars. More importantly, humans might be removed from operational planning, with their role to be confined to merely very high-level and broad input. The rise of hyperwars will essentially bring groundbreaking combinations of emerging technologies, much as the German blitzkrieg combined in novel ways fast armor, air support, and radio communications. General Allen and Husain concluded that the gap between winners and

losers would very likely resemble that of Saddam's Iraqi Army facing the "second offset" technologies of electronic warfare, precision-guided munitions, and stealth platforms.

The Russo-Ukraine War serves as a battlefield laboratory to test possible elements of the coming hyperwars and the impact of artificial intelligence on conducting and analyzing warfare. First, the integration of satellite imagery intelligence and target and object recognition technologies has provided the Ukrainian military with a very important geospatial intelligence edge in kinetic operations. Second, the Ukrainian intelligence apparatus has resorted to neural networks to run ground social media content and other open-source data to monitor Russian servicemen and weapons systems, then to translate the input into target acquisition information and military intelligence. Third, playing smart with data has also sparked a capability hike in drone warfare. Open-source defense intelligence studies suggest that Ukrainian arms makers used publicly available artificial intelligence models to retrain drone software applications with the real-world data harvested from the conflict. This modified data has then been used to operate the drones themselves. Ukrainian robotic warfare assets have seen a capability boost in precision and targeting with the help of the data-mastering process. In the future, some robotic baselines will likely see a faster and more profound improvement with the new leap in AI and information management. Specific drone warfare systems, such as the American Switchblade and Russian Lancet-3, already have design philosophies that prioritize computer vision to run target identification.

It appears that the zeitgeist is on the side of the hyperwar. After all, digital data has been on a huge and exponential growth trend for at least one decade. In 2013, the world generated 4.4 zettabytes of data—with a zettabyte amounting to 1021 bytes. Estimates from that period forecast 163 zettabytes of global data to be produced in 2025, which was considered a gigantic magnitude. At current rates, the reality this year will be even higher, at 180 zettabytes of data, or even more. The climb in data generation is intertwined with a rise in drone warfare systems proliferation and employment globally, as well as the production of robotic warfare systems. The dual hike in data and robots forms the very basis of hyperwars.

Other areas to monitor are orbital warfare and space warfare systems. Unlike warfighting and maneuver warfare on the planet Earth, the space operational environment presents technical challenges rather than strategic ones. Satellites are very vulnerable to offensive action since their movements are very limited and incur massive technical requirements for even small moves. A recent war-gaming exercise by American space and defense bodies showcase that one way to boost survivability in space warfare is to reposition "bodyguard satellites" to block access to key orbital slots. AI would be a key asset in accomplishing this concept in a preventive way. Being able to process very large data accumulations to detect hostile action patterns invisible to intelligence analysts, AI offers a new early-warning set of capabilities to decision-makers on Earth.

Horses, dogs, and human warfighters

Mankind as a species has long been fighting in cooperation with other members of the animal kingdom. The cavalry, for instance, for centuries leveraged the synergic warfighting mix of the domesticated horse—Equus ferus caballus—and Homo sapiens. Dogs—Canis lupus familiaris—are another example, as the first species domesticated by our kind and thus long-accustomed to fighting at our side. The role of war dogs is not restricted to history books or ceremonies and parades: a Belgian Malinois took part in the US killing of Abu Bakr al-Baghdadi, the founder of the Islamic State in Iraq and al-Sham (ISIS), back in 2019. Another dog of the same breed operated alongside the American Navy Seals in 2011, during Operation Neptune Spear, to kill the mastermind behind the 9/11 terror attacks, al-Qaeda ringleader Osama bin Ladin.

Scientifically speaking, Homo sapiens not only befriended horses and dogs—we neuroscientifically altered these domesticated species' decision-making algorithms through selective breeding. Scientific experiments showcase that domesticated horses have learned to read human cues to adapt their behaviors. War dogs are the product of key manipulations via human intervention across generations of deliberate breeding. Magnetic resonance imaging studies have proven that through selective breeding over centuries, humans have significantly altered the brains of domestic dog lineages to achieve behavioral specialization, such as scent hunting or guard capabilities and tasks.

The advent of AI requires us to accept that human brains, like those of domesticated animals with military utility, have adapted and will continue to adapt in response to neural stimuli. Combat formations, ranging from mechanized divisions to fighter squadrons, function as the musculoskeletal frame of warfare, while the human decision-making system functions as the brains and neurons. Throughout military history, the brain and the limbs interacted with various ways of communications—be it trumpets of military bands ordering a line march or contemporary tactical data links of modern warfare sharing real-time updates between a fifth-generation aircraft and a frigate's onboard systems. Homo sapiens has been at the very epicenter of the equation no matter what technological leaps have taken place and will adapt in unpredictable ways to being the slower and more marginal element in decision architecture. Drone warfare has not led to autonomous killer robots but to the rise of a new warrior class: drone operators with massive kill rates, seen both in Putin's invading army and the Ukrainian military. The rise of hyperwars may produce even further change to the human role, though, as the biological brain races to compete with accelerating decision cycles and nonbiological elements that outpace us. Domesticating AI in warfare will prove more challenging than either dogs or horses, and it is not yet clear what would ensue if we were to design servants quicker and more agile than the masters.

Implications for US-Turkish defense cooperation

The United States and Turkey are not only the two largest militaries within NATO; they have the broadest and most combat-proven drone warfare prowess. Their robotic warfare solutions have been rising quickly in autonomous characteristics and have already reached the human-in-the-loop level in combat operations. In the coming decades, human-out-of-the-loop CONOPS (concepts of operations) will likely emerge for both the US and Turkish militaries. This common feature of defense technology and geopolitics presages a lucrative path for cooperating within the hyperwar environment.

Moreover, Washington and Ankara can enhance their respective collaborations with Ukraine, a nation with the most recent drone warfare experience against the Russian Federation—a direct threat to NATO member states, as officially manifested by the alliance's incumbent strategic concept. The Ukrainian case extends to utilizing satellite internet connection in the C4ISR (command, control, communications, computers, intelligence, surveillance, and reconnaissance) aspect of robotic warfare, as well as employing private satellite imagery in target acquisition widely.

Kyiv has already developed close defense ties with the United States and Turkey—even taking part in the latter's drone proliferation, particularly in the engine segment (for example, Baykar's Kizilelma). Establishing a trilateral lessons-learned mechanism, which would incorporate defense industries alongside government agencies, would boost such an effort.

Overall, hyperwar seems to be paradigm for future warfare. The United States and Turkey make it possible, and through collaboration perhaps likely, that NATO will retain the upper hand in the hyperwars of the future.

Can Kasapoglu is a non-resident senior fellow at The Hudson Institute. Follow him on X @ckasapoglu1.

IN SYRIA'S FRAGILE TRANSITION THERE'S A GLIMMER OF A MORE STABLE MIDDLE EAST

By Charles Lister

For the better part of half a century, Syria has been an open wound in the heart of the Middle East, provoking instability, fueling conflict, and brutally suppressing its own people. Throughout Syria's nearly fourteen-year civil crisis, a long list of destabilizing knock-on effects spilled over into neighboring countries and the world at large. The long-standing moniker of "what happens in Syria never stays in Syria" perfectly encapsulated what for most of the past decade looked to be a truly intractable crisis.

All of that changed on December 8, 2024, when Bashar al-Assad fled his palace in Damascus en route to a hurried and unexpected asylum in Russia. After a sudden and lightning-fast offensive, a coalition of armed opposition groups toppled Assad's regime like a house of cards—in the space of ten days. All of a sudden, the international community has been presented with a historic and strategic opportunity to reshape the heart of the Middle East into a more stable, more integrated, and more constructive part of the region.

Syria's ongoing transition is profoundly fragile. It faces enormous challenges, but it also presents the international community with a dilemma. Since day one, the transition has been led and dominated at the top by Hayat Tahrir al-Sham (HTS), a former affiliate of al-Qaeda that was originally born out of the Islamic State group's predecessor movement, the Islamic State of Iraq and al-Sham (ISIS). That historical baggage provides reason for pause when it comes to engaging Syria's interim authorities.

However, the HTS of today is the outcome of nearly a decade of change. After splitting from ISIS in 2013, it went to war with the terror group. It publicly broke ties with al-Qaeda in 2016 and proceeded to facilitate the entry of thousands of soldiers into its territory by NATO member Turkey; agreed to and complied with a yearslong ceasefire brokered by Turkey and Russia; established a technocratic

"salvation government" in northwest Syria that delivered a higher level of services than other regions of the country; launched crippling crackdowns on both ISIS and al-Qaeda; and began engaging with the international community behind closed doors. Throughout this formative post-2016 period, HTS's ideology changed in ways that are arguably unprecedented in the history of the jihadist movement, with it not just turning away from global jihad, but turning against it—while embracing "revolution" and the green flag of Syria's popular uprising.

Despite HTS and its leader Ahmed al-Sharaa being at the helm in Damascus, much of the international community has rushed to engage—calculating that contact and engagement offers a far greater chance of shaping the outcomes of a fragile transition than a policy of isolation. Initially, the European Union, the United Kingdom, and Switzerland eased many sanctions linked to Syria's economy, in the hope of breathing some life back into the country. For its part, the outgoing Biden administration introduced a six-month "general license" in January 2025, temporarily waiving some restrictive measures. But this had no effect in facilitating transactions with governing institutions in Syria.

After years of extraordinary conflict, Syria's economy is broken and the humanitarian crisis worse than ever. Ninety percent of Syrians live under the poverty line; 70 percent of Syrians rely on aid; 99 percent of the Syrian pound's value has been lost; 50 percent of the country's basic infrastructure is destroyed; and fuel supplies have dropped to nearly zero. No matter who was running Syria's transition, the prospects of successfully escaping such catastrophic conditions would be impossible without sanctions relief. Regional states—Saudi Arabia, Turkey, and Qatar, in particular—stand poised to flood Syria with investment, oil, electricity, and cash, but not while American sanctions prohibit them.

Taking advantage of the historic opportunity provided by Assad's fall requires doing away with short-term tactical approaches and embracing a long-term view focused on Syrian and regional stability. On December 8, transitional authorities in Damascus were restricted only to HTS. Three months later, some things had changed: A national dialogue and conference had been held; broad committees had been formed to frame a constitutional declaration; and a transitional government was formed that significantly widened representation and technocratic rule in Syria's ministries. The latter marked a significant broadening of government representation, with just four HTS members out of twenty-three ministers. More than half of the new cabinet members were educated and worked professionally in Europe and the United States. All in all, it marked a shift toward genuine, technocratic government.

Nevertheless, some instability continues. Deeply entrenched sociopolitical and sectarian tensions remain a source of acute concern, but a major spike in violence—as was seen on March 7–8, 2025—was short lived. A government-appointed investigative committee has been tasked with determining culpability for crimes. Meanwhile, structural issues relating to disarmament, demobilization, and reintegration (DDR), foreign fighters, and challenges posed by ISIS and an Alawite armed resistance all persist, but ultimately, a fragile transition still offers the best hope for gradual stabilization.

The United States and NATO face two options: to engage and conditionally support Syria's transition in the hope that it will continue to consolidate control and broaden its representation; or to disengage and isolate the transition in favor or some other alternative. Neither is without risk, but the latter guarantees severe instability while the former aims to avoid it. President Trump's announcement in Saudi Arabia in May 2025 that he intends to end all sanctions on Syria is a sign that strategic calculations are returning to the forefront of U.S. policymaking on Syria. Subsequent public comments by Secretary of State Marco Rubio in front of Congress underlined that shift, as he suggested that if the U.S. did not lift sanctions, Syria was destined to collapse back into civil conflict. The key here will be time – how swiftly can executive waivers be issued to de facto remove sanctions restrictions on Syria's economy? The EU's decision on May 20 to lift all sanctions would suggest that things are set to move quickly. Should U.S. diplomats return to Damascus, Syria could confidently be placed on a new trajectory of recovery.

Meanwhile, US Central Command (CENTCOM) has continued to play an instrumental role in facilitating negotiations between the Syrian Democratic Forces (SDF) and Damascus, and in pressing the SDF to accept the framework agreement signed on March 11. Beginning in mid-December 2024, CENTCOM

contact has included meetings with Sharaa and an established line of communication with the Defense and Interior ministries, through which counter-ISIS activities are coordinated, deconflicted, and planned. Since January 2024, at least eight ISIS plots have been foiled by the interim government in part due to intelligence provided by the United States. A surge in US drone strikes targeting legacy al-Qaeda operatives in Syria's northwest in February 2025 was also almost certainly the result of a similar exchange.

With the United States determined to minimize its military and strategic investments in the Middle East and with NATO increasingly distracted by concerns in Europe, the prospect for stabilizing one of the thorniest and most destabilizing conflict theaters in recent history should be a no-brainer. Despite the risks and the many unknowns, prioritizing a strategy on Syria that is focused on shaping a stable and capable central government that is integrated into its neighborhood and capable of collectively resolving its own issues should be the only option on the table. That is the choice already made by Europe and the Middle East and the U.S. should follow suit. Should the Trump administration decisively join that track of engagement, the chances of Syria charting a course of stability will rise significantly.

Charles Lister is a senior fellow and head of the Syria Initiative at the Middle East Institute. Follow him on X at @Charles_Lister.

TURKISH-AMERICAN DEFENSE AND ENERGY PARTNERSHIPS SUIT THE NEW TRANSATLANTIC LANDSCAPE

By Gregory Bloom

The week following last November's US elections, the newly formed American Turkish Business Roundtable (ATBR) gathered in Istanbul for a press event where ATBR directors, General Jim Jones and General Tod Wolters (both retired and both former SACEURs), addressed the impact of Donald Trump's election victory on US-Turkey relations. At that moment, bilateral ties were strengthening, primarily through defense partnerships in response to the ongoing war in Ukraine. The announcement of a joint venture between Repkon and General Dynamics, known as Repkon USA, to manufacture 155 millimeter ammunition for Ukraine underscored both the fragility of the US defense industrial base and the advantages of accelerating the partnership with Turkey and deepening its role in NATO's supply chain.

The consensus at the Istanbul meeting was clear: The US-Turkey relationship was poised for further improvement. This expectation was based not only on the historically positive relationship between President Recep Tayyip Erdoğan and President Trump, but also on their shared approach to foreign policy: pragmatic, transactional, and focused on strategic economic and security interests. Yet, four months later, the transatlantic security landscape has again undergone a dramatic shift.

Trump's foreign policy signals a shift toward burden sharing among NATO allies, prompting European nations to assume greater defense responsibilities and reconsider US defense partnerships. This shift has forced European leaders to take greater responsibility for their own security needs, significantly increasing pressure on NATO members to boost defense spending to 5 percent of gross domestic product—a level that many European governments had previously resisted. As a result, European defense markets are undergoing a transformation. European countries, once heavily dependent on the United States for defense procurement, are now directing increased defense spending toward their domestic industries rather than US firms. This is evidenced by the decline in US defense stocks and the rise in European defense stocks in recent months.

For US defense firms, this presents both a challenge and an opportunity. If American companies want to remain competitive in the European market, they might be well-served to partner with Turkish firms to access European domestic procurement programs. Turkish defense firms, already well-integrated with NATO supply chains, provide an ideal platform for US companies to keep a foothold in Europe. Turkish manufacturers like Baykar, Aselsan, and Roketsan produce cost-effective, high-quality systems that European nations increasingly need. The Repkon USA partnership is just the first step, and other joint ventures could enable US firms to leverage Turkey's industrial base while meeting Europe's demand for non-American suppliers.

Over the past month, European defense stocks have outperformed US defense stocks due to concerns over NATO's future following Trump's remarks suggesting the United States might not defend allies that do not meet spending targets. This has driven European nations to accelerate defense investments, with spending projected to rise dramatically. Countries across Europe are prioritizing domestic production to reduce reliance on US suppliers, while Turkey is expanding its defense industrial base and exploring partnerships with US firms. As a result, US defense companies are seeing declines in value amid expectations that European nations will shift procurement away from direct US purchases in favor of European suppliers.

Turkey's role as an energy hub and regional leader is becoming more critical, serving as a key transit point for resources from Iraq, the Caspian region, and the Eastern Mediterranean to Europe. The expected reopening of the Iraq-Turkey Pipeline (ITP) and the potential expansion of Trans-Caspian energy routes further reinforce Turkey's strategic importance. In March, Turkey reinforced its regional energy leadership as Energy Minister Alparslan Bayraktar met with Iraqi Prime Minister Mohammed Shia' al-Sudani to discuss resuming Kurdish oil exports and exporting Basra oil via the Iraq-Turkey pipeline. With the United States revoking Iraq's waiver to import Iranian electricity, talks also focused on expanding Turkey's electricity and gas supplies to Iraq. In Erbil, Bayraktar and Kurdistan Region Prime Minister Masrour Barzani agreed to remove barriers to Kurdish oil exports through Turkey's Ceyhan port. These efforts reflect Turkey's strategy to deepen regional energy ties and enhance regional energy security. As US firms look to offset margin pressures at home, investment in Turkey's energy sector will only increase, aligning with Ankara's ambitions to diversify its energy partnerships and solidify its role as a key transit hub for Europe.

The Trump administration's focus on reducing inflation by lowering oil prices has also had significant consequences for global energy markets. As expectations for cheaper oil rise, many US producers are hesitant to expand domestic drilling, knowing that lower prices will reduce their profit margins. Instead, US energy firms are seeking new markets abroad, with Turkey, Iraq, and Libya emerging as key investment destinations. Recent deals underscore this trend, including the Continental Resources-TPAO partnership, which will explore and develop unconventional energy resources, and the ExxonMobil-BOTAS liquified natural gas agreement, which expands gas trade between the two countries.

The US-Turkey relationship is evolving in response to shifting transatlantic dynamics in defense and energy. The withdrawal of US financial and intelligence support for Ukraine amid Trump's ceasefire push, later restored, pushed European nations toward self-reliance, creating both risks and opportunities for American defense firms. To maintain access to European defense markets, US companies will need to adapt by forming strategic partnerships including with Turkish firms. At the same time, the changing energy landscape is driving American energy firms to invest in Turkey and the broader region, ensuring continued economic ties between the two nations. While geopolitical tensions remain, defense and energy cooperation offer a pragmatic path forward for US-Turkey relations in this new era.

Few things are simple in US-Turkish relations, and the current environment presents obstacles as well as opportunities. Tariff effects on transatlantic trade remain uncertain in the first half of 2025, including in the area of defense industrial cooperation, though for now it seems the 10 percent tariff on Turkey may end up being relatively advantageous compared to some markets. The instinct to localize and nationalize industrial production in both the United States and Turkey represents something of a headwind for larger projects. Domestic political unrest in Turkey may also create caution in Washington or hesitance among US firms out of concern over instability impacting Turkish markets or suppliers.

Yet these concerns, while real and significant, do not outweigh the glaring and growing need that prompted formation of the ATBR. Greater US-Turkey engagement is essential for maintaining US strategic influence in NATO, European defense markets, and regional energy security; that engagement also facilitates supply chain resilience and surge capacity for future military contingencies.

Congress would be wise to support deeper defense industrial cooperation, including joint production agreements, to keep US firms competitive in Europe and engaged with Turkey. Strengthening US investment in Turkey's energy sector would bolster transatlantic energy security and reduce reliance on adversarial suppliers. Additionally, renewed high-level diplomatic and security dialogues would help counterbalance Russian and Chinese influence while ensuring long-term US economic and security interests. A stronger US-Turkey partnership is not just beneficial—it is in many ways a strategic necessity.

Gregory Bloom is a senior advisor at the Atlantic Council's Scowcroft Center for Strategy and Security and a nonresident senior fellow at the Atlantic Council in Turkey.

WHY THE MIDDLE CORRIDOR MATTERS AMID A GEOPOLITICAL RESORTING

By Karel Valansi

Geopolitical earthquakes are redrawing trade routes across Eurasia. Russia's war in Ukraine has awakened Central Asian countries, which have discovered their strength through cooperation to develop their economies and attain independence. Without the constant attention of Russia, this cooperation contributes to developing the Middle Corridor, a key trade route linking China to Europe via Central Asia, the Caspian Sea, and the South Caucasus. It is an alternative to traditional east-west trade routes that bypasses Russia and Iran. The Middle Corridor is a regional initiative, not an external, imposed idea. It boosts regional cooperation, flexibility, economic growth, and diplomatic dialogue. While Russia and China try to maneuver according to new geopolitical developments, Iran is ignored in these initiatives.

The Middle Corridor creates a strategic role for Turkey as a central energy hub connecting Europe to additional suppliers. The European Union (EU) has recently increased its interest and investment in the corridor. However, the United States is still sitting on the sidelines even though the Middle Corridor presents a vital opportunity to counterbalance Russian and Chinese dominance in the region and limit Iran's desire to mitigate the effects of economic sanctions. Moreover, greater connectivity means access to Central Asia's vast deposits of rare earth elements crucial for civilian and defense products, new energy, and information technology. As corridor countries seek to reach new markets and lessen their dependence on Russia and China, Turkey, the EU, and the United States share a common interest in increasing cooperation and counterbalancing the power of Russia and China.

The rise of trade corridors

Following Russia's annexation of Crimea in 2014, the European Union faced unprecedented precarity and had to reconsider its energy structure to diminish its vulnerable interdependence on Russia's asymmetrical control over pipelines and weaponization of energy. China's Belt and Road Initiative and Europe's urge for diversification increased the need for connectivity and shifted international attention toward trade corridors.

As corridor wars intensify and become the new scene for great power competition, the United States needs a more assertive policy concerning Central Asia. This is especially true as the growing cooperation between Russia, China, Iran, and, to some extent, North Korea aims to challenge Western influence by building alternative trade routes aligned with their political agenda. Washington must actively engage in infrastructure initiatives across Central Asia to counterbalance this trend.

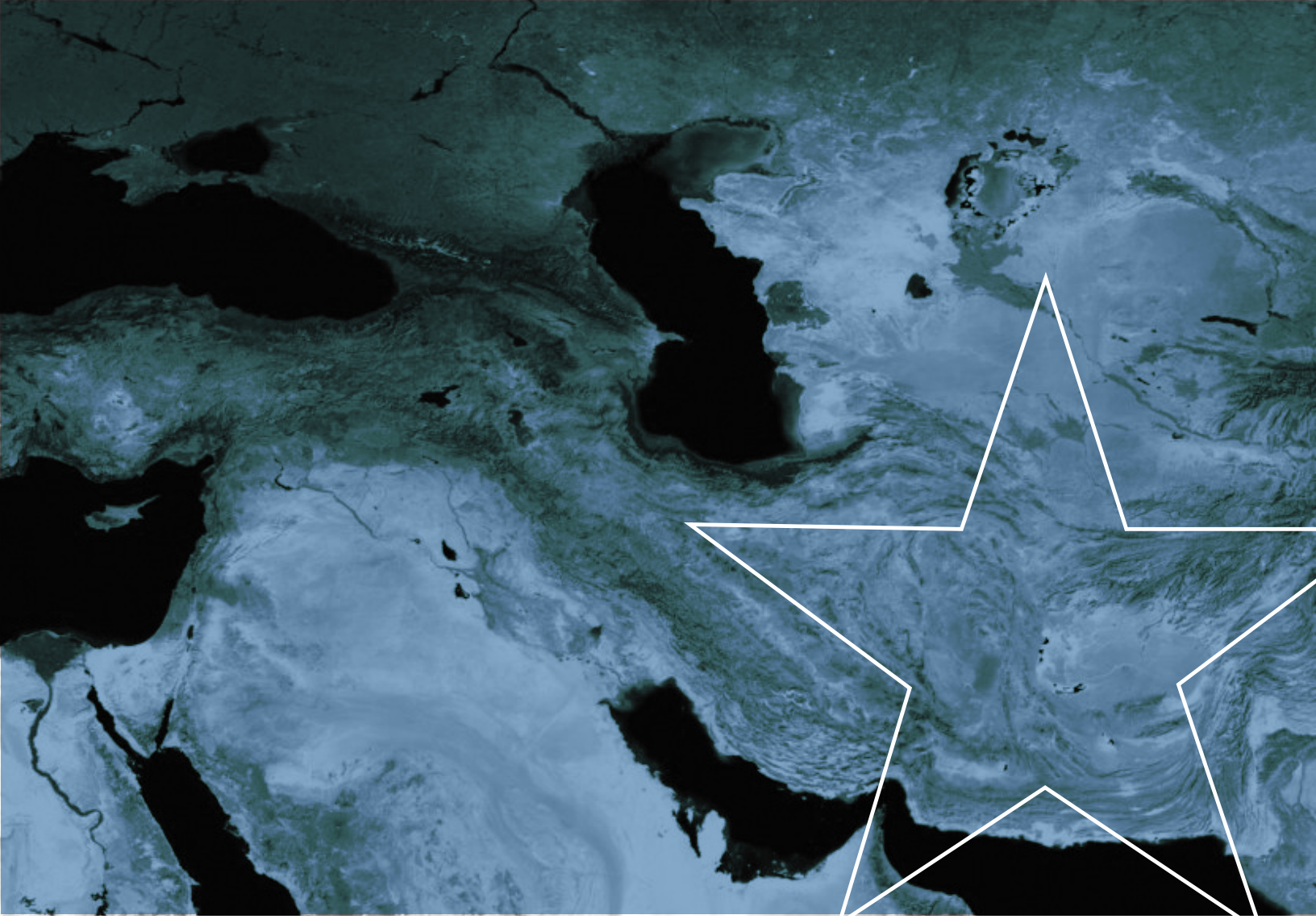
The Middle Corridor: A strategic alternative

The Trans-Caspian International Transport Route (TITR), or the Middle Corridor, is a multimodal trade route connecting Europe and China via Azerbaijan, Georgia, Kazakhstan, and Turkey. Since Russia's full-scale invasion of Ukraine in 2022, its strategic importance has grown as it bypasses both Russia and Iran. The Middle Corridor relies primarily on existing rail and port infrastructure and requires further development and investment. Countries along its path are working to position it as an alternative to the Northern Corridor (the traditional route through Russia) and the Southern Corridor (which runs through Iran).

Before 2022, the Northern Corridor carried more than 86 percent of transport between Europe and China, while the Middle Corridor constituted less than 1 percent. Following the full-scale Russian invasion of Ukraine, the Northern Corridor became a financial and political liability, especially for Western countries aiming to counter Russian control over trade routes. Shipping volumes of the Northern Corridor dropped by half in 2023 compared to 2022. Part of this traffic moved to the Middle Corridor, with increases of 89 percent and 70 percent in 2023 and 2024, respectively.

The Middle Corridor has many advantages. It is a relatively safer route, especially given the disruptions along the Northern Corridor due to Western sanctions on Russia and those in accessing the Suez Canal through the Bab el-Mandeb Strait due to increased Houthi attacks on vessels. In addition to providing economic revenues to corridor countries, some define the Middle Corridor as a "crossroads of peace," echoing the "peace pipelines" strategy of the past.

According to the World Bank, by 2030, the Middle Corridor can reduce travel times, while freight volumes could triple to 11 million tonnes, with a 30 percent increase in trade between China and the EU. However, progress in the Middle Corridor is slow, and various operational and regulatory



problems are causing unpredictable delays. There are still logistical and infrastructural challenges. Most importantly, its annual capacity (6 million tons in 2024) is drastically below the Northern Corridor's annual capacity of over 100 million tons.

Corridor wars through connectivity

Recently, connectivity and diversification have become key drivers in international politics, with regional and global powers seeking to expand their influence in the Middle Corridor. Japan is following these developments to diversify its trade routes while countering Russia and China. Although the Gulf Cooperation Council (GCC) is not yet a key player in the Middle Corridor, various summits between GCC and Central Asian countries since 2023 have manifested growing cooperation and increased GCC investments in the region's infrastructure.

As the natural entry point into Europe, Turkey understood the importance of connectivity to sustain economic, commercial, and investment relations and political and cultural ties within the region. In

line with its geostrategic location, Turkey has invested in many connectivity projects since the 1990s, such as the Baku-Tbilisi-Ceyhan pipeline, the International Transport Corridor, the Black Sea Ring Highway, the Eurasia Tunnel, the Yavuz Sultan Selim Bridge, the Edirne-Kars high-speed railway, and the Northern Marmara Motorway.

The Middle Corridor, as "the most reliable trade route between Asia and Europe," presents Turkey with a historic opportunity to establish itself as a strategic transit hub in Europe-China trade. Diversifying its energy suppliers could reduce Russian influence in Turkey's energy policy while expanding its influence in Central Asia and strengthening its economic ties with the EU. From the Turkish perspective, the corridor would improve its strategic position and strengthen its relations with Turkic-speaking countries in the region.

For the European Union, the Middle Corridor aligns with its Global Gateway strategy. The EU defined the development of the Middle Corridor as a priority to secure connectivity in the transport and energy sectors and promote sustainable economic growth in the region. While current global challenges increase the need for solid partnerships, Central Asia is a €340 billion economy, growing at an average rate of 5 percent annually, with further potential for collaboration. The EU sees the Middle Corridor as a fast and safer route connecting Europe and China, which helps diversify supply chains.

The Middle Corridor serving Russia, China, and Iran

For China, the development of the Middle Corridor is an opening to integrate into global markets and supply chains, an opportunity to reduce its financial burden and dependence on routes controlled by Russia, and also an escape from US sanctions.

Russia remains a major obstacle in developing the Middle Corridor. For regional countries, Moscow would "do everything in its power to control overland trade flows." While Russia is currently distracted with its war against Ukraine, considering Russia's sensitivities, it will at some point want to disrupt Western involvement in the region or even exploit the corridor for its own benefit. Russia has already begun exploiting the Caspian Sea and Kazakhstan to bypass Western sanctions. Moscow aims to leverage the enhanced connectivity of the Caspian Sea for military purposes, including the transport of Shahed drones from Iran. Additionally, since 2022, Russia has increased its investment in the International North-South Transport Corridor (INSTC) to diversify its trade routes, reducing its reliance on East-West routes.

Iran's neighbors and even its allies bypassed Iran in current connectivity projects. This result is mainly due to international sanctions, Iran's poor infrastructure, and a lack of investment. In 2023, representatives from Turkey, Iran, Kazakhstan, Turkmenistan, and Uzbekistan met to discuss the Turkmenistan-Uzbekistan Route, and Tehran immediately proposed a third alternative connecting this route to Iran. Tehran also invests in routes linking Iran to China via Afghanistan to secure a stronger

foothold and influence the balance of power within regional trade routes. Iran perceives the Zangezur Corridor as a potential threat that might increase Turkey's presence near its borders. For Tehran, this project is "Turkey's highway to Turan."

Potential strategy for the United States, the EU, and Turkey

Although Central Asia is pivotal in ongoing corridor wars, the region is still not an American priority. The United States needs a comprehensive and updated Central Asia strategy. As Secretary of State Marco Rubio recently signaled, a first step could be to end the Jackson-Vanik Amendment, which restricts formal trade relations with nonmarket economies such as Azerbaijan, Kazakhstan, Tajikistan, Turkmenistan, and Uzbekistan. The region also needs American investment to modernize the Middle Corridor. In addition to direct economic benefits, the United States could counterbalance the influence of Russia and China. While great connectivity would enable regional countries' ambitions, for the United States, it would facilitate access to vast mineral and rare earth reserves, which globally are under significant Chinese control.

The Middle Corridor serves as a lifeline for the landlocked region. Regional countries have the political will and determination to develop the corridor's potential. In the age of great power competition, these countries have significant room for maneuvering, and they benefit from the multidimensional foreign policy they pursue to enhance their autonomy. However, there is a growing mismatch between expectations and the capacity of the Middle Corridor.

The United States, the EU, and Turkey should cooperate and intensify their engagement with these countries to cultivate mutually beneficial partnerships. Turkey is wildly successful as Ankara invests political capital in strengthening relations. Enhancing partnerships with regional governments and investing in infrastructure would benefit regional governments and the West, as they can maintain their influence in shaping global trade routes. Given that Russia, China, and Iran are trying to prevent the growing Western influence in the region, the West must immediately recognize the strategic importance of transit corridors. As an influence war is intensifying over transit routes, the United States should be at the center of these developments—and not in the periphery—to benefit and counter the geopolitical challenges of Russia, China, and Iran.

Karel Valansi is a political columnist who analyses the Middle East and foreign policy issues in Şalom Newspaper and T24. Follow her on X @karelvalansi.

DEFENSE JOURNAL BY ATLANTIC COUNCIL IN TURKEY INTERVIEW WITH DOV ZAKHEIM

The Defense Journal of the Atlantic Council in Turkey recently interviewed former US Undersecretary of Defense Dov Zakheim, a longtime observer of US foreign and national security policy, regarding recent tensions between US allies Israel and Turkey. Those tensions have received extensive media coverage, including the remarks of both President Trump and Israeli Prime Minister Netanyahu during the latter's April 7 visit to the White House—which featured Trump expressing optimism that tensions were manageable and that he might play a mediating role.

DJ: Thank you for your time in speaking with us. Israel and Turkey have had alternating close and tense relations for decades but maintained discrete contacts throughout the cyclical ups and downs. Are they still talking?

Zakheim: It's hard to know because if they are talking it's probably through intelligence channels, which get reported the least. My guess is that they probably are, if only to deconflict over Syria. There was a report commissioned by Prime Minister Netanyahu that said tensions over Syria could create a dangerous situation. Regional press reported a conclusion that the countries "could go to war," but that's not what the report said—just that the tensions were potentially quite serious. Turkish hard-right commentators from MHP [Milli Hareket Partisi, the National Movement Party, of Turkish nationalist] and HUDA PAR [Hür Dava Partisi, the Independent Cause Party, of Kurdish Islamist] have pretty much said the same thing; even President Erdoğan has said similar things. The tensions are worse than what happened after the Mavi Marmara incident in some ways.[1] The military and security establishments in both countries tend to be more realists and to seek de-escalation, though; so, they are probably still talking.

1 The Mavi Marmara incident involved Israeli Navy interdiction of civilian ships trying to break a blockade of Gaza, which resulted in the death of nine Turkish activists and ended with a 2013 apology by Netanyahu.

DJ: After the very tense period between 2009–2014, President Obama and later Trump worked to ameliorate Turkey-Israel tensions, leading to a rapprochement of sorts. This contributed to a softening of tensions over time. Without US involvement, the two countries pursued a diplomatic reconciliation in 2023 that was interrupted by the Hamas attacks of October 7 and the Israeli response. Do the two countries need the United States as a mediator or are they better off together proceeding at their own pace and modalities?

Zakheim: Trump has offered to mediate between Israel and Turkey so as to improve their relationship. But Washington might be too distracted by the president's other priorities. President Trump has focused on de-escalating the situation in Gaza, which could indirectly benefit Israel-Turkish tensions stemming in part from the conflict there. In addition, the Trump administration also has Ukraine, tariffs and trade, and a lot of things competing for the attention of the president and his key advisers. It is not surprising that Netanyahu raised Syria with President Trump, because Israelis take a different view of what's going on there and are concerned about the Turkish role: They are not comfortable with what they see as growth in Turkish influence there. Discontent in Jerusalem can't be ignored, though it appears that President Trump's initial response was balanced and that Netanyahu didn't get the backing for his position that he might have wanted.

DJ: Syria is a unique challenge between Israel and Turkey now because it essentially makes them neighbors—tense and distrustful neighbors—not just countries in the same region. How do both countries meet their minimum interests in Syria?

Zakheim: It shouldn't be zero-sum between these two, because there are other players in the equation. The Iranians are still present in Syria to a degree, and the Russians of course hope to keep air and naval bases [there]. Israelis are divided as to whether it is good or bad for Russia to stay or go. It appears Netanyahu thinks it may not be a bad thing to use the Russians to balance Turkish influence. Then there is the question of Damascus, the transitional government, itself. Some think they haven't really evolved from their roots in al-Qaeda, while others say Damascus—especially transitional President Ahmed al-Sharaa—have been signaling moderation and reaching out to the West because they know that they need Western support. Where there are many players, a modus vivendi is possible, especially if Sharaa wants to move toward the West more than the Assad regime did. There is great fluidity in Syria now. The Kurdish factor still has to play out as well and the success or degree of their reintegration affects Ankara's positioning. Abdullah Öcalan may want to disarm the movement he founded, the PKK [Partiya Karkaren Kurdistan, or Kurdish Workers' Party], but it is possible that parts of the movement in Iraq or Syria do not.[2] With so many possibilities, Jerusalem and Ankara both would do well to show flexibility.

2 On May 12th 2025, following a congress of PKK leadership, the organization announced a decision to disarm and dissolve organizationally. The impacts of this decision on the ground in Iraq and Syria remain to be seen, as noted in the interview.

DJ: Is Syria without Assad better for Israel than Syria with Assad?

Zakheim: I think it will very much depend on where the Syrian government goes. We haven't heard the same sort of vitriol out of Damascus as under Assad, despite Israel taking more territory and conducting air attacks. It may be that the Israel-Syria border becomes a quiet border like it was under Hafez al-Assad as opposed to the more dangerous border that became the norm under Bashar and his backers, Hezbollah and the Islamic Revolutionary Guards Corps. Bashar was a slimy figure to the Turks as well: He lied to Ankara and was problematic for Israel. It may well be that a government that proceeds the way al-Sharaa says he wants to go could be a plus for both Israel and Turkey.

DJ: How much of the current Turkey-Israel tension do you see as structural or systemic, and how much personal (i.e., a product of the combative Netanyahu-Erdoğan relationship)?

Zakheim: There is no doubt that the personalities don't line up very well. For comparison, though, we can look at the relationship between Netanyahu and former President Biden—they were not fond of one another, but the two countries remained close. It was Erdoğan who patched things up gradually with Netanyahu over a decade. Erdoğan is a realist, and he knows very well that Israel has a number of things to offer and is an important market. Remember that Turkey is developing a very high-tech military and other industries, and there are many areas where they might partner with Israel. There was over $1 billion in bilateral trade that has now been cut off—though some still comes through third countries. The fact remains that Erdoğan is a pragmatist. If Gaza is somehow settled, that is a way for trade relations to be restored, and these two countries are potentially very important partners for trade and security cooperation.

Overall, despite the ups and downs there is a degree of complementarity. Both leaders are survivors and have pragmatist streaks. Gaza is a place where the United States can clearly play a major role in reconciling interests. If there is reconstruction, Turkish companies, especially in infrastructure, can have a role. A Turkish constructive role in stabilizing Gaza could be a new pivot point. It is true that Erdoğan plays to his base, but both he and Netanyahu remain less vitriolic about "the other" country in the equation than the hardliners in their own coalitions.

Dov S. Zakheim is a member of the Atlantic Council Board of Directors. He was U.S. undersecretary of defense (comptroller) and chief financial officer from 2001-04. He is a senior advisor at the Center for Strategic and International Studies and senior fellow at the CNA Corporation.

DEFENSE JOURNAL BY ATLANTIC COUNCIL IN TURKEY INTERVIEW WITH HALUK BAYRAKTAR

Haluk Bayraktar is the CEO of Baykar, an autonomous technology company based in Turkey. He began his tenure at Baykar in 2004 as an engineering manager, when Baykar's autonomous technology efforts were still nascent, and has been involved in every aspect of the business's growth into a leading firm in the Turkish defense sector: project management, logistics, and business development. Baykar's pioneering role in the rise of the Turkish drone industry makes Bayraktar a fascinating and well-informed observer on security and alliance dynamics affecting Turkey, NATO, and the region.

This interview has been lightly edited for style.

DJ: Thanks for taking the time to talk with us. Let's start with developments of common interest to readers in Turkey, the United States, and Europe. Following the industrial and technology cooperation deal with Italian defense and aerospace group Leonardo, what's next for Baykar in the Western market?

HB: Baykar has become the world's biggest drone maker, with thirty-eight international partners now—from Europe and NATO to the Turkic countries, Africa, and the Middle East. Among NATO allies, we have partnered with Poland, Romania, Kosovo, Croatia, and of course, Turkey's military, law enforcement, and disaster relief agencies. Turkey is a NATO ally, so all our products and technologies follow the technical standards and military specifications of the West and are entirely compatible with Western systems. The Western market is critical for us.

As for Leonardo, we are on the path to establishing a joint venture (JV). They are a major player in Europe, and their work areas are highly compatible with ours—a lot of synergies and complementarity. We were already working with them, integrating payloads and systems with our products: This has become a very strong bond or marriage. A JV is a great opportunity/potential to bring robust, field-proven systems to a broader market. Baykar has drones all around the world, including tactical and strategic platforms. Leonardo produces critical subsystems with great potential for Europe and broader markets where they have a presence, including South America and elsewhere, but Europe is our main focus. In Europe, there is no other mature alternative to what we have.

DJ: What differentiates your approach to manned technology? What is the key to your value proposition?

HB: We are a tech developer but not just tech. It's about tech but also about ways to use that technology—about operational employment. Our approach centers on reliability, safety, and robustness. Our experience brings lots of feedback from various areas, which makes our products even more robust. So, we combine technology with real-world experience. Our fleet now exceeds 300,000 flight hours per year, so there is a lot to analyze. Our systems offer the highest performance-to-cost across the market. They are the most adaptable with continuous innovation, and they are equipped with the most advanced technology. In the defense sector, there are huge manufacturing capacity challenges everywhere, whereas there has been a great buildup in Turkey in the last twenty-five years. Over just twenty years, we've gone from roughly seventy to over 3,000 companies in the sector, with thousands of products. It's a great ecosystem with important internal synergies. Baykar has established mass production capacity for unmanned systems. Our Istanbul base is the biggest facility of its kind in the world. So, potential customers know we can deliver quickly. We produce 250 Bayraktar TB2 [unmanned combat aerial vehicles] per year, fifty Akinci [high-altitude, long-endurance] UCAVs per year, and we're ramping up to support larger capacity as the Bayraktar TB3 UCAV and the Kizilelma unmanned fighter jet move from development to production.

DJ: What is your conceptual and defense technological approach to Kizilelma? Do you see it as a loyal wingman to the fifth-generation Kaan fighter or a pathway to replace Kaan in the future?

HB: Kaan is a national manned fighter program, funded by the government. Kizilelma is Baykar's own design and project. It is our final target on the unmanned family of products—a fighter with both subsonic and supersonic capabilities. We do not envision it as a loyal wingman, though it can work as an integrated adjunct in theory, if one were to couple it and use it with manned fighters in risky environments. US President Donald Trump recently introduced the American F-47 as a mothership controlling other fighters, and the consortium developing [the Global Combat Air Program involving Italy, the United Kingdom, and Japan] conceived it in similar fashion. But we envision Kizilelma as operating on its own with a fleet control system. As a company, we don't develop manned systems. We exclusively invest in drones. That is our focus. Kizilelma is an aircraft with aggressive maneuvering, autonomous operation, and controls that can be flown by few operators. It completed its first flight in 2022, and we see that as a revolution. Bayraktar TB3 has the capability to take off and land on short-runway aircraft carriers. Kizilelma will have this feature too.

Fighter pilots stationed at aircraft carriers have to fly every single day and complete a certain number of sorties annually to stay current. That's perhaps fifty training flights per day. By contrast, unmanned platforms do not require as much effort or so many daily landings to be certified for carriers. Moreover, Kizilelma will integrate artificial intelligence to assist with delegation of command and other operational aspects.

DJ: How do you view the F-35 debate in the United States, especially Elon Musk's view that manned aircraft are not the best path forward?

HB: There are about 13,000 manned fighters worldwide right now–Russian, Chinese, US, and other systems combined. We believe that all those platforms will eventually be converted to unmanned systems, even though one cannot prove that point just yet. But when you look at the field, it's clearly headed in that direction. To be clear, they may not be replaced one for one. It may be more like three to five unmanned platforms to replace each manned fighter. Unmanned systems will be everywhere, and it will be a crowded airspace—not just unmanned fighters but smaller first-person view drones and loitering munitions. They will be everywhere, and every country will need the ability to build and use these things. For nations to defend themselves in this century, this is a necessary capability—much like the ability to produce bullets.

DJ: Turkey has shown great agility in what has been termed "drone diplomacy," or complementing regional policy initiatives with defense sales. What is the nature of public/private partnership in Turkish drone diplomacy?

HB: Overall, the major players in the Turkish defense ecosystem are still government-owned institutional firms. The private sector is smaller but dynamic and growing. Of course, I think that the private sector's dynamism is preferable. SAHA is the industry group representing the smaller and

midsize firms that comprise most of our private sector, and I am currently serving as the chairman.

Still, the system operates similarly for public and private firms. Anyone wishing to export applies to the Ministry of National Defense, which in turn coordinates with the Foreign Ministry and the intelligence community to issue an export license. It is the government's decision at the end of the day. The government doesn't promote private-sector firms per se. The Defense Industry Agency (SSB) has foreign relationships and partnerships, and they generally favor government-affiliated companies. One of the objectives of SAHA has been to help small and medium-sized companies become more visible. Our annual exhibition helps smaller players. Baykar is an example of successful growth: We've gone from five employees in 2004 to over 6,000 today. We know how important it is to become more visible, and we support other firms doing that. We try to make it easier for the newcomers. That is my responsibility as SAHA chairman.

My view is that European countries are better at using governmental influence to promote national commercial products. Baykar's products promote themselves through their unique utility as well as aggressive marketing and social media presence. The Turkish government doesn't subsidize sales, although other countries may. But we don't rely on public credit or government grants. This is unique to Baykar: We've developed an unmanned fighter with the company's own money. At the end of the day, since companies are required to receive a permit to export, the government plays an important role. The higher levels [of government officials] do talk about it and the firms need approval. The government spending environment matters greatly for domestic firms, too. And while Turkey spent 4.5 percent of its [gross domestic product] on defense before 2000, that number has remained close to 2 percent for two decades now. It was just in the last two years that it approached 3 percent.

The bottom line is that drone diplomacy is a reality and the Bayraktar TB2, in particular, has proven that. But the government doesn't lead: market demand leads, the company follows, and the government supports.

DJ: Can you talk a little bit about the price/performance balance for Baykar systems?

HB: The Bayraktar TB2 is a very good example for price/performance balance. The initial purchase price or acquisition cost is one factor, but the life cycle, including maintenance and durability, has to be considered as well because reliability affects long-term costs. Let's say you procure an alternative to Bayraktar TB2 for half the price. In reality, this is not an advantage if this "alternative" has double the crash rate. So, Bayraktar TB2 has a reliability advantage because you don't face as many crashes and the cost consideration changes.

Unmanned systems represent a new niche in the defense ecosystem. Aerospace is conservative, especially for manned systems: extensive certifications and regulations serve to protect human life. But unmanned [aerial] vehicles are a different paradigm—you can add new sensors, new technology, and new operational approaches rapidly. An example is the fact that manned systems still use mechanical gyros, whereas the technologically advanced UAVs are currently using even cheaper

MEMS [i.e., microelectromechanical system) sensors, fiber-optic alternatives with high-end software systems. You can easily innovate in the unmanned realm with the latest technology, whereas you need to be conservative in the manned domain because you need to make sure that each new step complies with the certification and safety standards of manned aviation. You can qualify unmanned systems with very high-end software—even AI software—and hardware much more quickly.

Baykar has a price advantage because we are vertically integrated. We have strong in-house avionics, power systems, and ground element design. This allows us to tailor critical subsystems and enable attractive pricing with high-end capability. The TB2, with a six-unit ground system and everything, still costs less than a manned platform. Our TB2 fleet recently passed the one-million-hour milestone, so our operating cost is just several hundred dollars per hour—compared to a minimum of $20,000 per hour for a single manned F-16. When you can mass produce, availability and reliability turn into a potent combination. Additionally, customers benefit from the rapid in-service schedule compared to a manned system. A country can field a full UAV system with trained people within a year, providing a very quick and affordable defense capability compared to a manned system, which is a multiyear exercise.

DJ: You mentioned thirty-eight international partners earlier. Ukraine was one of your earliest: Have you been able to apply lessons from that partnership with newer programs, such as those with the Gulf countries?

HB: Ukraine was Baykar's first export customer. Our cooperation with Ukraine opened up the strategic level of cooperation for us. We had been working with them since 2011, but things moved rapidly after 2014. In 2014, no one else would sell them armed drones. We didn't yet have a mature system, but we agreed to help. They were in need, huge need, and searching. That was more than ten years ago. They couldn't get what they wanted elsewhere either, so they came to Turkey. President Erdoğan's leadership mattered at that point, as he considered Ukraine a neighbor and friend in need. With the government's support, we supplied armed drones starting in 2019—the order was placed in 2018. They were very happy and this was very important. President Zelensky visited in August 2019 after taking office. At his request, we agreed to build a factory in Ukraine. He acquired more systems, and we discussed an offset-type obligation. I told them: "You have very good engines. Maybe we can figure out a way to use your engines on our platforms." So, we created effective cooperation with Motor Sich and others. In a sense, Turkey and Ukraine are complementary countries. When the war escalated in 2022, we did our best to support Ukraine. You may remember the European crowd-sourcing campaigns for Europeans to buy TB2s on Ukraine's behalf, but we never accepted the money. We donated the platforms, giving up over $110 million in income that we chose not to generate. We are not war profiteers. We delivered all Bayraktar TB2s free of charge as part of those campaigns and the campaign funds were used for humanitarian aid and other pressing needs to support Ukraine.

Haluk Bayraktar is the CEO of Baykar, an autonomous technology company based in Turkey. Follow him on X at @haluk.

The Atlantic Council is a nonpartisan organization that promotes constructive US leadership and engagement in international affairs based on the central role of the Atlantic community in meeting today's global challenges.

Atlantic Council

1400 L Street NW, 11th Floor, Washington, DC 20005

(202) 463-7226, www.AtlanticCouncil.org