

DRIVERS AND IMPLICATIONS OF BAYRAKTAR TB2 SALE TO POLAND

RIFAT ÖNCEL

SETA | PERSPECTIVE

MAY 2021 · NUMBER 64

- What is the content of the agreement?
- Why did Poland prefer the Bayraktar TB2 drone?
- What are the possible implications of the agreement?

The agreement between Turkey and Poland regarding the sale of Bayraktar TB2 UAVs reflects more than a mere arms transfer transaction and is likely to generate important implications. Signed during Polish President Andrzej Duda's three-day visit to Turkey, the agreement made Poland the first NATO and EU member country to purchase a Turkish drone. The successful operations conducted by Turkish drones in the recent conflicts in Syria, Libya, and Azerbaijan proved the combat effectiveness of the systems, which formed the essential rationale behind Poland's purchase. While the drones will enhance Polish national defense capabilities, they will also contribute to the sustainability of the Turkish indigenous defense industry. Furthermore, the sale is also promising in terms of enhanced interoperability within NATO due to the possible diffusion of Turkish operational experience and drone doctrine to the Polish Armed Forces.

THE CONTENT OF THE AGREEMENT

According to the deal, Poland is set to receive 24 Bayraktar TB2 drones produced by Baykar Makina and smart micro munitions MAM-L and MAM-C produced by Roketsan along with ground control

stations and ground data terminals. Turkey will also provide training and the technology transfer for the service and maintenance of the systems. The Bayraktar TB2 is a medium-altitude, long-endurance, tactical unmanned aerial vehicle, which has endurance of 27 hours and can fly up to 27,000 ft.¹ It entered the Turkish Armed Forces (TAF) inventory in 2014 and was armed next year; the Bayraktar TB2 is currently used operationally by the TAF, the Gendarmerie General Command, the General Directorate of Security, and the National Intelligence Organization. According to Baykar, a total of 180 TB2s are currently in the service of Turkey, Ukraine, Qatar, and Azerbaijan.² The Bayraktar TB2 can carry 4 MAM-L and MAM-C missiles, which are produced by Roketsan. These precision-guided munitions are designed for air-to-ground missions and are used by UAVs, among other air platforms. The munitions have semi-active laser seekers and warheads effective against armored units, including the tandem war-

1. "Bayraktar TB2," *Baykar*, <https://baykardefence.com/uav-15.html>

2. "The Bayraktar Tb2 UAVs Will Fly In The Skies Of The European Union!" *Baykar*, May 24, 2021, <https://baykardefence.com/haber-The-Bayraktar-Tb2-UAVs-Will-Fly-In-The-Skies-Of-The-European-Union.html>

RIFAT ÖNCEL

Rifat Öncel is a PhD student at the Department of International Relations of the Middle East Technical University. His main research interests include defense policy, the armed forces, and emerging military technologies.

head designed to penetrate through reactive armor technology.³

WHY DID POLAND PREFER THE TB2 DRONE?

There are some underlying factors that facilitated the deal. First and most important, the Bayraktar TB2 is a combat-proven UAV. In Syria, Libya, and Nagorno-Karabakh, it became increasingly evident that Turkish drones decisively influenced the course and outcome of the conflicts. The transformation of the traditional roles of drones in these conflicts shifted perceptions on drone warfare and elicited new trends regarding drone procurement and counter-drone systems. Until recently, the primary roles attributed to drones were intelligence gathering, reconnaissance, and aerial surveillance, along with limited military operations such as targeted killings or surgical strikes against terrorist leaders. However, the conflicts in Syria, Libya, and Nagorno-Karabakh demonstrated that when drones are successfully integrated into the concept of operations and supported by electronic warfare capabilities and trained personnel, they are also considerably effective weapons for ground attacks in contested zones. Along with ISTAR (Intelligence, Surveillance, Target Acquisition, Reconnaissance) missions, Turkish drones proved capable of conducting a series of successful offensive operations ranging from the suppression of enemy air defenses to the destruction of armored enemy units.

Second, Turkish defense products have emerged as cost-effective weapon platforms in the international market in recent years, and the Bayraktar TB2 is no exception. Regarding the cost-effectiveness of Turkish drones, President of Defence Industries Ismail Demir stated that "if a system from any other country had the same capability as ours, its (price) would be double."⁴ Third, political willingness to export and adequate de-

fense industry production capacity have ensured that Turkey emerged as a reliable arms exporter country. Beginning in 2018, Bayraktar TB2 drones were sold to Qatar, Ukraine, Libya, and Azerbaijan with timely deliveries. Currently, the drones have become operational in all of these countries. On the other hand, political willingness to export also plays an important role in finding new markets for Turkish defense products. This is boosted by military cooperation agreements, which have become a new form of partnership between governments.

POSSIBLE IMPLICATIONS

Major weapon procurements often create long-term military relationships between the supplier and recipient states which have the potential to deepen military cooperation and may lead to a spillover effect for cooperative endeavors in other sectors. Turkey and Poland share NATO membership status and Poland is also a member of the EU, with which Turkey enjoys decades-old cooperation despite fluctuating relations. Accompanied by Poland's strategic geographic location at NATO's eastern flank against the emerging instabilities that have surfaced after Russia's illegal annexation of Crimea in 2014, the agreement stands to generate important geopolitical implications.

First, the deal will boost ally capabilities within NATO by providing cost-effective ISTAR capabilities and deterrence, while increasing alliance solidarity and cohesion. The training, technical support, and the possible diffusion of Turkish operational experience to Poland will increase the interoperability between the two countries' armed forces and will boost Polish warfighting capabilities. The significance of operational experience in the course and outcome of the conflicts was demonstrated in Azerbaijan army's combat performance against Armenia during the Nagorno-Karabagh War last year as Turkey did not only provide drones but also shared its concept of operations. Consequently, technology alone cannot be a game-changing force - with the exception perhaps of nuclear weapons - unless successfully utilized by the military genius in a Clausewitzian sense.

3. "Mam-C Smart Micro Munition," Roketsan, <https://www.roketsan.com.tr/en/product/mam-c-smart-micro-munition/>; "MAM-L Smart Micro Munition," Roketsan, <https://www.roketsan.com.tr/en/product/mam-l-smart-micro-munition/>

4. "High-Profile Successes to Make Turkey Premier Exporter of UAVs," *Daily Sabah*, March 19, 2021, <https://www.dailysabah.com/business/defense/high-profile-successes-to-make-turkey-premier-exporter-of-uavs>

Second, the deal further strengthened the idea that Turkish drones could be the perfect counter-instrument to Russian air and missile defense systems. It is no surprise that after Ukraine, Poland decided to purchase Bayraktar TB2 drones. Perceiving Russia as a great and imminent threat, the procurement of Turkish drones provides cost-effective and combat-proven capabilities with relatively quick delivery periods. Deepening defense relations and the sales of drones to countries such as Ukraine and Poland also contribute to Turkey's national security. Along with enhancing NATO's eastern flank capabilities, the deployment of Turkish drones in friendly countries neighboring Russia can be considered as a balancing act towards Moscow. Against Russia's multidimensional pressures on Turkey ranging from conflict zones to commercial and tourism relations, the sales of Turkish drones reflect Turkey's willingness to counter that pressure. Turkey's latest decision to return to the Baltic Air-Policing mission is another step in that direction. Soon, Turkey will deploy F-16 aircraft and approximately 80 personnel to Malbork Military Air Base in Poland to support NATO's Baltic Air-Policing. This is the first Turkish participation in the mission after a deployment to Lithuania in 2006. The air-policing mission in the Baltic functions as a deterrence against the threats that emanate from NATO's eastern flank and contributes to the cohesion and solidarity within the alliance.⁵

Third, the deal between Turkey and Poland will likely facilitate the exports of Turkish drones to other customers. Previously, several states showed interest in the products. For instance, last year, Tunisia inked a deal to purchase ANKA-S, an armed drone manufactured by Turkish Aerospace Industries while recent media reports argued that Morocco would be the next customer for Bayraktar TB2s. The media reports stated that Morocco desires to purchase 13 drones in order to increase its capabilities against the militant

separatist group Polisario Front.⁶ In October of last year, Serbian President Aleksandar Vučić publicly stated that his country was "considering" purchasing Bayraktar TB2 drones.⁷

There is also an increasing expectation that Turkey's other NATO allies will purchase the products. This would further contribute to the interoperability in the alliance while addressing to some extent the gap in air force inventories. One of the primary reasons behind the popularity of drones is the desire to compensate for the weaknesses in air force capabilities as drones are much cheaper to purchase and to operate than fighter aircraft. Today, more than 100 countries have drones in their inventory and more countries are seeking to purchase advanced versions. Similarly, several countries are investing in their national defense industries and launching joint cooperative initiatives to avoid falling behind in the technological arms race. On the other hand, alarmed by China's rapidly increasing share in the drone market, the U.S. has sought ways to loosen the restrictions on drone exports for some time. Hence, it is likely that the growing interest in drones will maintain its pace in the coming period and that Turkey will continue to be one of the leading players in the market.

CONCLUSION

The deal between Turkey and Poland will contribute to the Polish national defense and strengthen the Turkish defense industry. Furthermore, the deal has the potential to become a catalyst for future drone exports to Turkey's other NATO allies. The delivery of Turkish drones and the diffusion of the concept of operations could significantly increase the interoperability within the North Atlantic Alliance. Still, there are serious challenges against further cooperation within NATO. Particularly, the outstanding disputes

5. "NATO Allies Continue Enduring Air Policing Mission in Baltic Region," Allied Air Command, April 26, 2021, https://ac.nato.int/archive/2021/ESP_ITA_TUR-BAP_eAP

6. Elis Gjevori, "Report: Morocco Set to Acquire Turkish Made Bayraktar Drones," TRT World, April 19, 2021, <https://www.trtworld.com/magazine/report-morocco-set-to-acquire-turkish-made-bayraktar-drones-46038>

7. Hamdi Firat Buyuk, "Serbia Considers Buying Turkish Armed Drones," *Balkan Insight*, October 6, 2020, <https://balkaninsight.com/2020/10/06/serbia-considers-buying-turkish-armed-drones/>

between Greece and Turkey in the Eastern Mediterranean could spoil cooperation opportunities due to the insistent Greek pressure on EU member states. While this policy has failed to achieve the Greek objectives to this day, it still influences the decision-making process and ensuing policies.

Lastly, the deal further underlined the fact that unmanned aerial vehicle systems will likely to be one of the main drivers of the Turkish national defense industry. For years, an essential objective of the Turkish defense industry has been to become a leading producer country of a specific critical weapon platform. The current course suggests that unmanned aerial vehicles fit this objective because of

the adequate technical capacity, the technological know-how, and the significance of the unmanned platforms in future warfare. Emerging military technologies and particularly the military applications of artificial intelligence further indicate that robotic systems will increasingly play a greater role in the future operational environment. While the air force dimension is leading the technological leap in the sector, unmanned land and naval platforms are also becoming more and more visible in recent years. Thus, current success and future expectations demonstrate that it can be expected for Turkey to continue investments in the unmanned platforms not only in the air forces but also in land and naval services.



SIYASET, EKONOMİ VE TOPLUM ARAŞTIRMALARI VAKFI
FOUNDATION FOR POLITICAL, ECONOMIC AND SOCIAL RESEARCH
مركز الدراسات السياسية والاقتصادية والاجتماعية

www.setav.org | info@setav.org | [@setavakfi](https://twitter.com/setavakfi)