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Turkey's Military Spending Trends: A Reflection of Changes in Defense Policy

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ABSTRACT *The existing body of research on defense spending contains two main theses that appear in the much-debated discourse of "guns versus butter." The first major theoretical issue that has dominated the field for many years concerns 'security.' In order to keep the country safe, primacy should be given to security within the grand strategy. The other argument gives priority to 'butter,' since defense spending is considered as a wasteful and inefficient investment. Apart from these major arguments, scholars have also long debated the long-term political, military, economic, commercial, diplomatic, social and cultural consequences of reducing versus increasing military spending. In light of these debates in the literature, this paper attempts to show that the prioritization of defense spending during the AK Party era is specifically the outcome of a political preference—a pragmatic shift in the political landscape from idealism to realism.*

Keywords: Defense Policy, Turkey's Arms Trade, Military Expenditure

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Introduction: Challenges in Analyzing Spending Trends

The collected data and findings on defense spending patterns must be interpreted with caution owing to several factors. First of all, 'defense spending' is a contested term; there is no agreed upon definition of what constitutes 'security,' 'military,' and 'defense' spending, and so these concepts have overlapping, and even slightly confusing meanings. The degree of uncertainty around the terms used to describe 'expenditures' derives from differences in terminology preferences, budget items and the variety of parameters and calculation formulas used by governmental and non-governmental organizations. For instance, although NATO's defense expenditure and Stockholm International Peace Research Institute's (SIPRI) military expenditure terms are similar to each other, their assessment processes vary due to the parameters used. To give an example, SIPRI includes paramilitary forces "when judged to be trained, equipped and available for military operations;" however, with regard to the change made in the definition in 2004, NATO does not include paramilitary forces in its defense budget unless they are "realistically deployable."[1] While SIPRI includes pensions in military spending, it excludes civil defense spending; the opposite is the case in the IMF's annual reporting. To show the difference in calculation formulas (base year, etc.), in 2019, Global Firepower ranked Turkey in 18th place, while SIPRI ranked Turkey in 16th place in the list of top military spenders. Briefly, since there are no commonly adopted content standards and criteria, the data and estimates on countries' military/defense expenditures may differ in published reports. Indeed, NATO drew attention to the distinction between its own definitions of defense spending and those of member states, and to the differences in the official statements and figures reflected in the budgets by national authorities.

In the analyses process, one of the main obstacles is to choose the most accurate data source and later analyze these big data assets. This remains as a major problem especially when the calculation techniques of Turkey does not match the techniques of other governmental and non-governmental organizations. In this regard, it must be underlined that Turkey's defense expenditure figures may differ greatly from SIPRI's or others' numbers on military/defense expenditures, since Turkey's budget structure has changed to the multi-year budgeting system that is classified analytically in 2006. Though the budget system changed in accordance with European Systems of Accounts (ESA) and Government Finance Statistics (GFS), the particular concern regarding the new system is that the public investment expenditures cannot be distinguished clearly. Therefore, the figures based on the data of the Ministry of Treasure and Finance give a total amount of defense services which includes the budgets of both military and civil organizations that cannot be separated clearly from each other.

Second, the changing natures of 'security' and 'defense' concepts have altered the duties and responsibilities of the related institutions such as the Turkish

Armed Forces, National Intelligence Organization, Turkish Police, Coast Guard and Gendarmerie. Compounding the difficulty, confidentiality remains an important obstacle for the collection of data regarding military/defense, security and intelligence expenditures which are sensitive issues for states. As a matter of fact, it is not possible to foresee and determine the extent to which states share their data on defense expenditures and military budget items with regional and international organizations, or make this information available to the public. In this regard, especially for democratic countries, there is a fine line between 'state secret' and 'transparency policy.' For instance, although the UN Report on Military Expenditures is expected to serve as a tool to promote transparency and confidence building among states regarding military matters, many member states have not been consistent in their reporting, and the overall level of reporting has declined over the past decade.[2] Another example of state secrecy is 'off-budget expenses,' which are evident in the case of Turkey, illustrating the challenge of obtaining accurate data on Turkey's real defense expenditures and thus its actual power.

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Defense spending is generally observed and explained in the literature in two dimensions: economic and military. The first argument is based on the discussion of whether there is a linear or non-linear relationship between military expenditures and economic growth; the second focuses on the effects of defense spending on militarization and military power. The fact remains that studies on defense spending rely heavily on quantitative approaches that lead to generalizations, thus research on the subject has been mostly restricted to limited comparisons. However, the analysis of defense spending trends must avoid these types of generalizations and limitations, and a much more holistic approach should be adopted instead, that measures a wide set of variables and additional factors. Most importantly, it must be borne in mind that each country's military/defense spending patterns must be evaluated within its *sui generis* nature. For instance, Turkey's defense spending patterns cannot be compared to those of its traditional allies in NATO due to its unique geostrategic location and threat mapping. Likewise, Turkey's increasing military expenses should not be interpreted as strong evidence of a tendency towards militarization. Although Turkey is ranked 19th in the Global Militarization Index's (GMI) 2019 Militarization Index Ranking, this position cannot be accurately and comprehensively explained under the Index's three categories of indicators (spending, personnel and weapons). Indeed, according to the GMI's Militarization Index Ranking from 2002 to 2019, Turkey has always ranked between 19th and

Ankara has spent $1.5 trillion in counter-terrorism operations, the country could have been 25 years ahead if it had not been so acquainted with terror

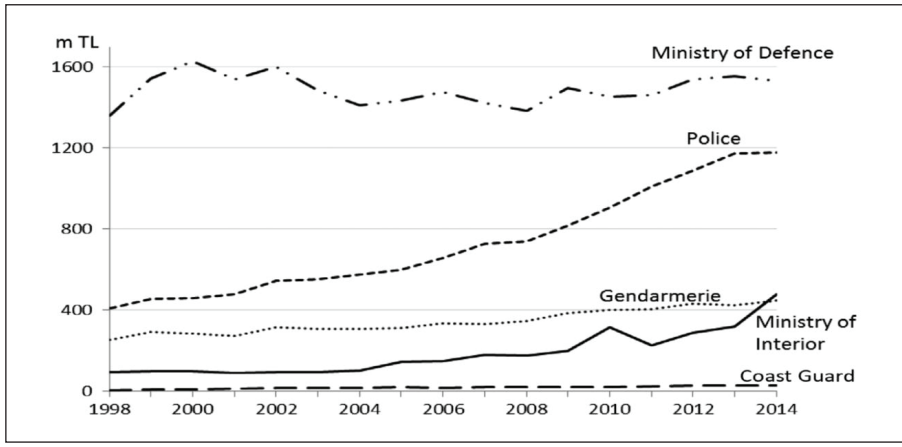
25th. In 2002, Turkey ranked 21st and in 2018, it ranked 19th.[3] However, throughout these years, Turkey's security policy and defense posture changed almost entirely with regard to different parameters that cannot be explained solely by militarization. Likewise, the U.S. spent $750 billion on defense and ranked in 1st place in Global Firepower's Military Strength Ranking for 2020; meanwhile, Turkey with a $19 billion defense budget ranked in 11th place.[4] Given the huge gap between their defense budgets and military technology levels, how the U.S. and Turkey can have very close military strengths requires alternative explanations. Thus, it must be highlighted that whilst scoring the factors, Global Firepower emphasizes 'quantity,' not 'quality,' which appears to be a limitation of the method being used. For instance, Turkey's total aircraft strength of 1,055, which includes both fixed-wing and rotorcraft platforms from all branches of service (fighters, dedicated attack aircraft, transports, trainers, special mission, helicopters and attack helicopters) might not be a good indicator of its airpower, since it does not include UAVs which are widely used in counter-terrorism operations. Nor does it account for the quality of the aircraft; indeed, the value of Turkey's aircraft strength might be misevaluated since Turkey has been removed from the F-35 program. This example reveals the significance and need of forming a dataset for Turkey's instruments of national power, developed by its own as an inventory work and a fusion center for critical information.

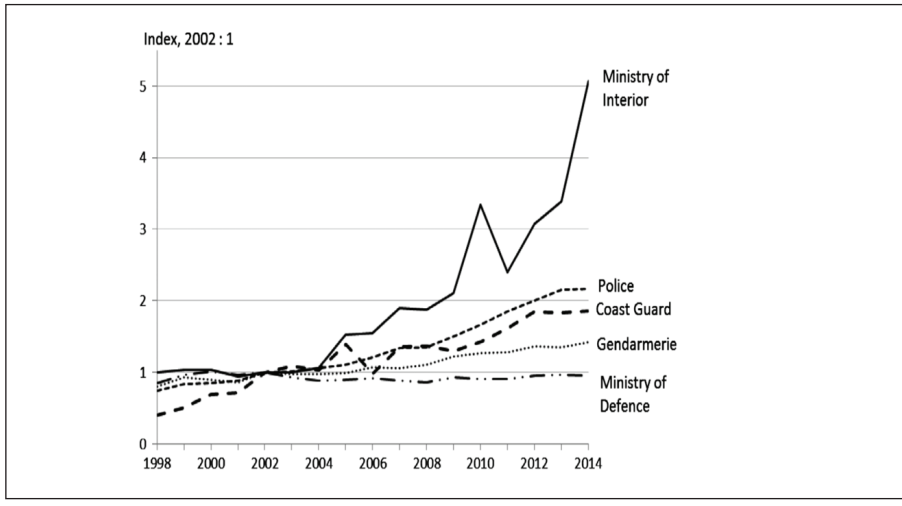
Patterns of Turkey's Military/Defense Spending

While it is assumed that Turkey has always made great investments in military spending, in fact for a long time a large amount of its military expenses has been allocated to institutions responsible for Turkey's homeland and border security. As displayed in Graph 1 below, the portion of the national budget that is allocated to security agencies has generally exceeded the budget allocated to the Ministry of Defense. Actually, this appears also in the country's three-year fiscal investment programs as can be seen in Table 2 and Table 3 below. When examining the budget devoted to ensuring homeland security, Turkey's almost fifty-year long fight against terrorism (against terrorist groups such as ASALA, the PKK, DHKP-C, al-Qaeda and Hezbollah) must always be borne in mind. In terms of long-term spending trends, then-Deputy Prime Minister Numan Kurtulmuş's address to the Turkish Parliament in February 2016 is important as he acknowledged that since 1984, Ankara has spent $1.5 trillion in counter-terrorism operations, the country could have been 25 years ahead if it had not been so acquainted with terror.[5]

As seen in the first figure of Graph 1, in the first years of the AK Party era, the budget allocated for the Ministry of Defense tended to decrease and remained rather stable until 2008; meanwhile the budget of the National Police grew continuously based upon an almost 50 percent increase in the number of staff from 2004 to 2014 due to increases in wages and other personnel costs. According to Şenesen and Kırık, the negative growth rates of the defense budget in the early years of AK Party era occurred due to its demilitarization reforms and a kind of reaction to the military's e-memorandum (namely the 'e-coup') in April 2007. This policy attitude had started to change by the AK Party's second term following the election victory of July 2007.

Graph 1: 1998-2014 Security Budgets, ₺ Million, (1998 Prices) and Security Budget Indices (Base Year 2002)





Source: *Gülay Günlük Şenesen and Hikmet Kırık*[6]

New products and capabilities that have successfully passed rigorous testing processes are revealed by the Presidency of Defense Industry, February 10, 2020.

Presidency of Defense Industry / AA

Nevertheless, the high level of the defense budget and national police budget shown in the first figure of Graph 1 might be inadequate to fully comprehend the changing trend in the security and defense budgets of the AK Party period. Indeed, while examining and analyzing the security and defense budgets, some determining factors and changing conditions should be taken into consideration. For instance, the role and mission of the military and security agencies have changed over time. The changing nature of the security concept has necessitated the redefinition of the roles of the military, the police, the gendarmerie and other security and military related agencies. To give an example from the recent past, the ongoing global coronavirus pandemic, namely COVID-19, that emerged in late 2019 caused a controversy over the role and duties of the armed forces (since their main task is to defend the country from external threats) and regional military/defense alliances (e.g. NATO) in supporting the fight against the public health crisis, as may be seen in within the debates on civil-military relations and crisis management.[7] While the military does play a crucial role during times of emergency, the coronavirus pandemic might lead to an increase in defense spending, not because of buying new strategic weapons but rather for the construction of new field hospitals or any type of investment to strengthen military capabilities for crisis management.

Şenesen and Kırık draw attention to the reforms made in Turkey's security bureaucracy which reflect the transformative policies and the changing mindset of the AK Party era. As a notable example, the Powers and Duties Law (PVSK) was amended four times in 2002, 2004, 2005 and 2007. However, for the authors, the legal changes in the PVSK or Penal Code were more empowering for the police and imply the continuation of the longstanding authoritarian understanding of the Turkish politics in the name of political stability. In that respect, the authors refer to Lebovich's "democracy effect;" believing that democratization might

cause "a change in budget priorities, and, thus create a shift from military to civilian spending," whereas in Turkey's situation, empowering reforms for the mandates of the security forces led to an increase in security/military spending, rather than allocating more resources for public spending.[8]

Even though accountability and transparency are fundamental principles, the secrecy, classification and confidentiality will continue to be the subject of budgetary debates in many of the democratic states (i.e. the U.S.' black budget) for military and intelligence-related activities

Nonetheless, this argument cannot be valid for all conditions and countries; since democratic reforms do not necessarily result in security spending reductions or entail that all democratic countries will have modest defense budgets. Therefore, Turkey's increasing security, military and defense spending cannot be explained with reference to a lack of democracy or will to sustain political stability. Likewise, the traditional approach of taking the geographical separation of the duties of security agencies in Turkey might lead to inadequate assessments or false evaluations because of these agencies' dual organizational status. Hence, Graph 1 above, which shows the huge increase in the budget of security agencies, must be evaluated via a more holistic and comprehensive approach. It must also be emphasized that following the failed coup in July 2016, the organizational status of the Turkish Police, Coast Guard and Gendarmerie was restructured and changed; both the General Command of the Gendarmerie and Turkish Coast Guard were transferred under the direct control of the Ministry of Interior.[9]

Moreover, one of the limitations of the graphical explanation is that it does not explicitly show the real amount spent on security and defense. That is to say, the graphics do not include a significant amount of the funding allocated for security and defense expenses in the off-budget. Therefore, perhaps one of the most serious disadvantages of this calculation methodology for Turkey's security and defense budget is the covert appropriation (discretionary funds) and then off-budget funding in the form of the Defense Industry Support Fund (SSDF). Stated in Public Financial Management and Control Law No. 5018, discretionary funds are provided for confidential intelligence and defense services, and to meet the needs of maintaining national interests and objectives. As specified in Article 24, total amount of the covert appropriations allocated in the relevant year shall not exceed five per thousand of the sum of the initial appropriations in the general budget. Although the amount of the discretionary funds used or to be used is known or at least estimated, detailed information about the allocation of these funds among the institutions is kept confidential because the use of the funds is flexible for all state necessities, and the decision about allo-

While the level of defense spending remained almost stationary during the mid-1990s, the third great leap forward in spending appeared in the early 2000s

cations, expenditure and the realization of covert appropriation is under the authority of President Erdoğan.[10]

Despite the confidentiality policy, in November 2014, Turkey's then Finance Minister Mehmet Şimşek explained in detail for the first time the allocation of covert appropriation during the budget talks in the Grand National Assembly's Planning and Budget Commission.[11] However, critics not only question the allocation of the funds among the institutions but also the ambiguity about what the 'interest' and 'necessity' concepts include, as well as the huge increase in covert appropriation during the AK Party era. For instance, in a written parliamentary question in February 2017, CHP Deputy Murat Bakan asked for more transparency from the Finance Minister Naci Ağbal and demanded that he explain the motivations and objectives lying behind the striking growth in covert appropriation over the last 10 years, since the expenditures rose from ₺436 million in 2007 to ₺1 billion 616 million in 2016. Bakan also asked for more information about the reasons for extending the field of compulsory expenditures in January 2017 because the discretionary funds were five times higher than security and defense expenditures.[12] A more recent argument against the use of covert appropriation was penned by Çiğdem Toker, questioning the correlation between budget revenues and discretionary funding, as the funding source comes from taxes collected.[13] In Toker's graphic explanation, the data covering the period of 2003-2018 reveals a sharp rise in budget revenues, which increased by 7.3 times over the past 16 years. The budget revenue, which was ₺103 billion in the first year of the AK Party government, had increased to ₺757.7 billion in 2018. In contrast to the budget revenues, the use of covert appropriation was ₺98.3 million in 2003 and reached its peak in 2017 with ₺1.9 billion in expenditure and amounted to ₺1 billion 722 million by the end of 2018. The overall data reveals that the total amount of discretionary funding has reached ₺14.5 billion, which means a 17.5-fold increase in covert appropriation expenditures from 2003 to 2018, approximately 2.5 times more than the increase in budget revenues during the AK Party era.[14]

Covert appropriation has been subjected to harsh criticism during the AK Party era, particularly with regard to the shrinking economy, rising taxes and secrecy. However, it should be noted that criticism regarding covert appropriation does not pertain solely to the AK Party era. In fact, similar criticisms, and even worse, were voiced long before in Turkey. To give an example, in April 2016, Former Prime Minister Mesut Yılmaz, while testifying in the hearing of the February 28, 1997 post-modern coup case expressed that Turkey is the only democratic country in the world in which there is no audit and control over discretionary funding/covert appropriation. As seen from Yılmaz' confes-

sion or self-criticism of his era, Turkey's covert appropriation has always been a problematic issue regarding the amount spent on covert operations and the clandestine activities of the intelligence and defense agencies.

With that said, it should not be overlooked that covert appropriation is allocated for clandestine activities that serve Turkey's high priority intelligence and military requirements in order to realize vital interests and objectives.[15] Even though accountability and transparency are fundamental principles, the secrecy, classification and confidentiality will continue to be the subject of budgetary debates in many of the democratic states (i.e. the U.S.' black budget)[16] for military and intelligence-related activities.

Altogether, this discussion reveals how and why the analysis of Turkey's defense spending might be confusing, particularly since the calculation of security and defense budgets might overlap or duplicate. While the above-mentioned factors (off-budget funding, budgetary items, secrecy, etc.) highlight the difficulty of formulating an accurate data analysis, the facts and figures below draws a general picture of Turkey's military/defense spending patterns.

A Brief History of the Changes in Turkey's Defense Spending

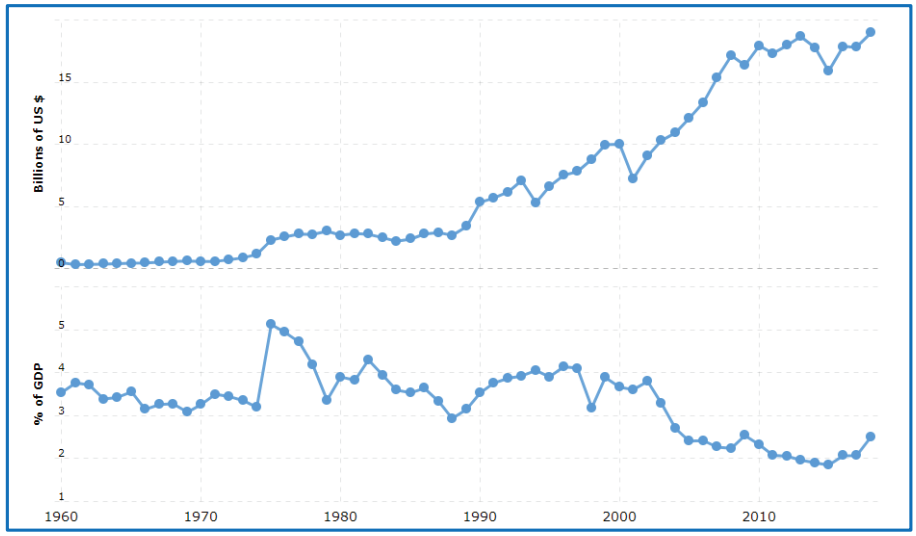
The graph indicates Turkey's dollar-denominated defense spending during the years 1960-2018. Despite the declines seen since the early 1960s, the general trend shows that Turkey's defense spending has increased over the past five decades. The steady level of state defense spending from 1960 until the mid-1970s started to change owing to the risks and threats stemming from the changing security environment. Indeed, the first leap forward in Turkey's defense spending growth occurred mainly because of the Cyprus issue, Specifically Turkey's Peace Operation Cyprus in 1974 and the subsequent U.S. arms embargo of 1975-1978.

The second leap forward took place in the late 1980s and early 1990s in order to address the emerging risks and changing priorities largely shaped by concerns over maintaining Turkey's national security such as the dominant terrorist threat to Turkey posed by the PKK and the worsening regional security environment stemming from the Iran-Iraq War (1980-88) and the First Gulf War (1990-91). While the level of defense spending remained almost stationary during the mid-90s, the third great leap forward in spending appeared in the early 2000s. Although the chart displays a fluctuating course after 2008, Turkey's defense expenditures have continued their upward trend.

The graph shows Turkey's GDP growth rate between 1960-2018. From the 1960s to the mid-70s a more static economic course was seen, although the Turkish economy had grown very fast throughout the year of the Cyprus Peace Opera-

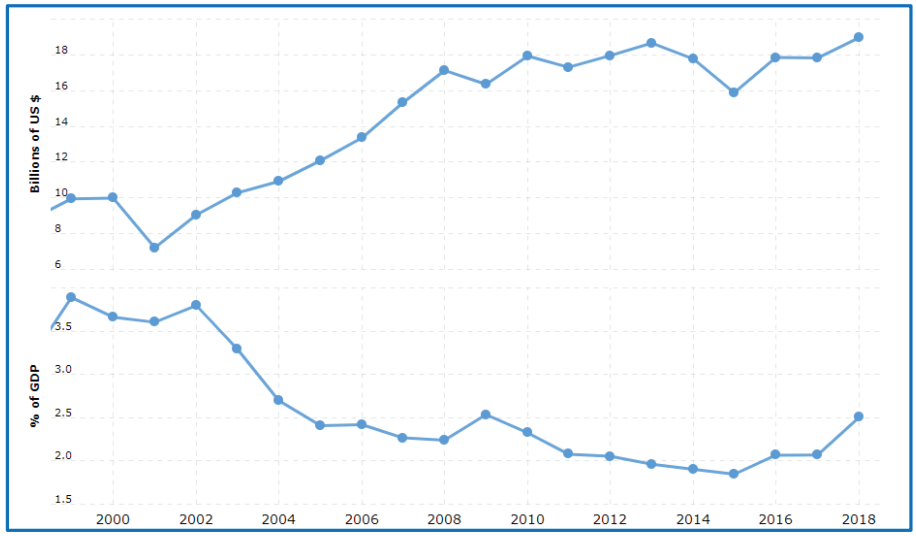
tion. However, after a sudden big jump in 1974, the GDP growth rate generally declined, except in the early 1980s. Despite the positive momentum that persisted during the 1990s, the GDP growth rate declined once again toward the end of the 1990s which was actually a warning sign for the markets, indicating the severe economic crisis of November 2000 and February 2001. The GDP growth rate has maintained a much more stable profile since the mid-2000s.

Graph 2: Turkey's Military Spending/Defense Budget and percentage of GDP (1960-2018)



Source: *World Bank Data, Macrotrends*[17]

Graph 3: Turkey's Military Spending/Defense Budget (Billions USD) and percentage of GDP 2000-2018



Source: *World Bank Data, Macrotrends*[18]

Graph 2 shows Turkey's military spending and its share of GDP for the period between 2000-2018, for the most part representing the AK Party era.

The beginning of the 21st century, in particular the September 11 terrorist attacks, signified a new era: the post-9/11 global security environment is far more complex and chaotic than any previous era in terms of the diversity of risks and threats, the altering character of war and the changing roles of state and non-state actors. As a noteworthy impact of the changing geopolitical landscape and global security environment, numerous countries have increased their defense budgets. In keeping with this trend, Turkey demonstrated its willingness to provide more funding for national defense. Following 9/11, Turkey ranked 13th in the list of the worlds' 15 major spender countries in 2002; as one of the countries with the largest increases, Turkey placed 6th in the list of countries with the greatest changes in military expenditure.[19]

Considering the persistent problems such as unemployment levels, high interest rates, inflation and current account deficit, Turkey still has a lot of work to do for addressing the structural problems in the Turkish economy

Apart from the U.S.-led global war on terrorism, specific developments directly concerning Turkey's national security environment in the 2000s proved the vital importance of investing in defense. The 2003 İstanbul bombings carried out by al-Qaeda, the ongoing conflicts in the Middle East, the Arab spring, the continuing terrorist threats posed by the PKK/YPG/PYD, FETÖ and ISIS, the operations conducted in Syria (Euphrates Shield, Olive Branch and Peace Spring), the fronts opened in Libya and the regional escalations in the Eastern Mediterranean have led to an increase in Turkey's security and military budgets. In addition, Turkey has been eager to show its support for domestic production; Ankara's determination to achieve an appropriate level of 'strategic autonomy' has played a crucial role in the rise in national defense spending. These are some of the reasons driving the need for increasing the defense budget, despite the declines seen in GDP from time to time. As Graph 2 indicates, however, since 2013 Turkey's GDP growth and defense expenditures appear to be parallel.

Table 1: Turkey Defense Budget by Year (₺ Thousand[20], 2013–2019)

	2013	2014	2015	2016	2017	2018	2019
Defense Services	19,784,158	21,255,644	22,876,604	26,550,460	30,779,685	41,494,933	53,349,228
Military Defense Services	19,476,021	20,895,020	22,155,915	25,564,000	29,422,100	38,779,026	49,659,293
Civil Defense Services	306,688	177,595	81,179	66,754	66,962	25,991	53,660
Foreign Military Assistance Services	0	60,018	39,500	48,750	53,032	152,000	81,750
Non-Classified Defense Services	1,449	123,011	600,010	870,956	1,237,591	2,537,916	3,554,525
Budget Realization	408,224,560	448,752,337	506,305,093	584,071,431	678,269,193	830,809,401	999,489,433
Share in the Budget (%)	4.8%	4.7%	4.5%	4.5%	4.5%	5.0%	5.3%

Source: *Ministry of Treasure and Finance.*[21]

As shown in Table 1, the biggest share of Defense Services is allocated to Military Defense Services. The share of Defense Services in the budget has been increasing since 2013.

Table 2: 2017-2019 Investment Program Development Guide Appropriation Ceilings Offered for Public Agencies (related to military and internal security) within the Scope of General and Special Budget (Current Prices, ₺ Thousand)

General Budgeted Administration						
Administrations/ Agencies	2017		2018		2019	
	Capital Expenditures	Capital Transfer	Capital Expenditures	Capital Transfer	Capital Expenditures	Capital Transfer
National Intelligence Organization (MIT)	846,339		740,905		478,000	
Secretariat General of the National Security Council (MGK)	4,387		4,668		4,943	
Ministry of National Defense (MSB)	243,848		280,626		297,182	
Ministry of the Interior	779,386		666,010		705,304	
The General Command of Gendarmerie	349,551		371,921		393,865	
Directorate General of the Turkish National Police (EGM)	2,430,136		2,560,897		2,864,790	
Turkish Coast Guard Command	57,606		61,292		64,908	
Undersecretariat for Public Order and Security, Ministry of the Interior (KDGM)	1,000		3,992		4,228	
Special Budgeted Administration						
Undersecretariat For Defense Industries (SSM, renamed SSB in 2018)	3,302		3,513		3,720	
Scientific and Technological Research Council of Turkey (TÜBİTAK)	399,630	1,600,367	318,807	1,479,209	337,616	1,562,626

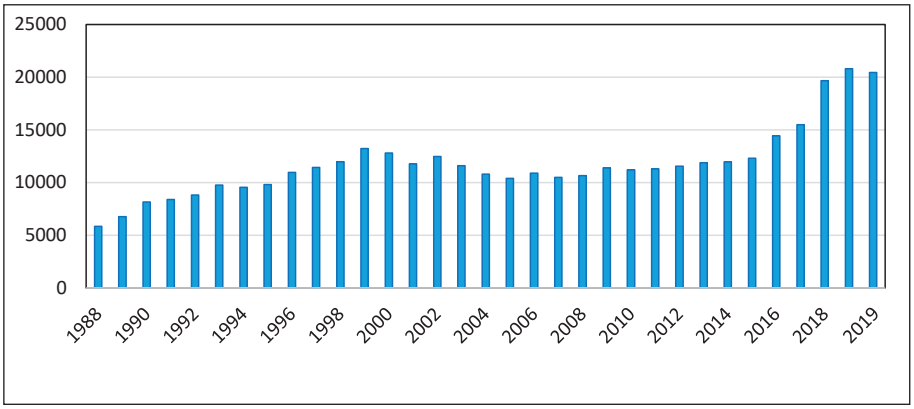
Source: *Republic of Turkey, Ministry of Development*[22]

Table 3: 2020-2022 Investment Program Development Guide Appropriation Ceilings Offered for Public Agencies (related to military and internal security) within the Scope of the General and Special Budget (Current Prices, ₺ Thousand)

General Budgeted Administration						
Administrations	2020		2021		2022	
	Capital Expenditures	Capital Transfer	Capital Expenditures	Capital Transfer	Capital Expenditures	Capital Transfer
National Intelligence Organization (MIT)	500,000		497,910		523,898	
Secretariat General of the National Security Council (MGK)	2,588		2,577		2,712	
Ministry of National Defense (MSB)	188,475		187,687		197,483	
Ministry of the Interior	666,562	3,350	663,776	3,578	698,421	3,763
General Command of the Gendarmerie	399,338		399,079		420,577	
Directorate General of the Turkish National Police (EGM)	1,649,364		1,642,470		1,728,196	
Turkish Coast Guard Command	38,181		38,315		40,455	
Special Budgeted Administration						
Presidency of Defense Industries (SSB)	1,807		1,799		1,893	
The Scientific and Technological Research Council of Turkey (TÜBİTAK)	280,732	1,335,092	279,559	1,431,240	294,150	1,508,765

Source: *Presidency of Strategy and Budget*[23]

Graph 4: Turkey's Military Spending (1988-2019, $ Million)



Source: *SIPRI Military Expenditure Database*[24]

What can be clearly seen in Graph 4 is that, despite some fluctuations, there has been a continual growth in military spending. Regarding the increasing PKK threat throughout the 1990s, Turkey had to allocate more funds for counter-terrorism activities. An especially sharp increase in military spending took place after the second half of the 1990s and peaked in 1999, the year when Abdullah Öcalan, the founder and leader of the PKK terrorist group was captured in Nairobi and brought to Turkey by the National Intelligence Organization.

However, despite the increasing defense spending trend, the ratio of defense expenditures to GDP has remained almost steady

While analyzing Turkey's military spending trends, along with the security risks and threats, the impacts of Turkey's currency crisis in 1994, the Russian financial crisis of 1998, the Marmara Earthquakes in 1999 and the financial crises of November 2000 and February 2001 should also be taken into account. After facing periodic economic crises since the 1990s, especially the major economic crisis of 2001, during which the Turkish economy shrank such that the growth rate plummeted to -9.5 percent, the highest shrinkage rate ever seen after 1945, Turkey launched a program titled "Transition to A Strong Economy Program" in 2002 and started implementing tight monetary and fiscal policies. This program not only helped the Turkish economy survive, but contributed to Turkey being less affected by the global financial crisis of 2007-2008, the worst economic disaster since the Great Depression of 1929. Moreover, thanks to this program, in the course of the reform process the Turkish economy recovered and its annual growth rates increased. Economic recovery gained momentum immediately after the implementation of the new program, bringing the average growth rate to 5.2 percent for the

For a long time, Turkey met its security and military needs by applying the direct foreign procurement model which depends on purchasing weapons systems and military equipment from foreign suppliers

period 2002-2012.[25] Indeed, compared to many other countries Turkey had a better growth trend in 2010.

Considering the persistent problems such as unemployment levels, high interest rates, inflation and current account deficit, Turkey still has a lot of work to do for addressing the structural problems in the Turkish economy. The issue that should be underlined here is that Turkey's economic conditions do not affect security and defense spending as in the past. Otherwise, it would be impossible for Turkey to conduct its current security and defense policy which is much more proactive compared to previous decades. Likewise, Turkey would not be able to continue investing in its defense industry to realize the ultimate goal of achieving 'strategic autonomy.'

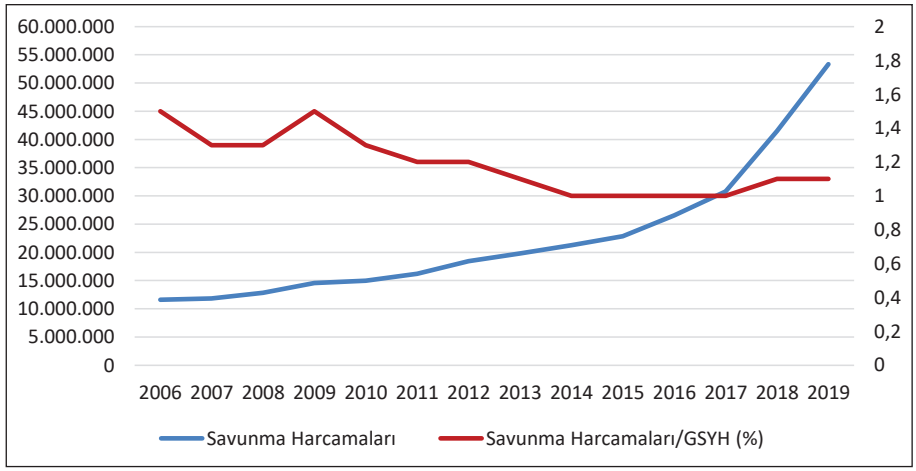
As a matter of fact, in spite of the AK Party's Kurdish Peace Initiatives (also known as the Reconciliation Process or "Peace Process"), the expected reduction in military spending was not realized for the period from 2009 to 2014. On the contrary, since 2010, Turkey's military spending has gradually increased, owing to the developments in its region, namely the Arab Spring and the outbreak of the Syrian Civil War. Indeed, a phenomenal growth rate in defense spending following the fall of the Peace Process in July 2015, commensurate with the spreading political, social and economic impacts of the Arab uprising, the growing terrorism threat due to the attacks carried out by ISIS and the YPG/PYD and Turkey's actions in the Mediterranean and Aegean Sea based on the newly adopted 'Blue Homeland Doctrine.'

Table 4: The Ratio of Defense Expenditures to GDP (Thousand ₺, 2006-2019)

Years	Defense Expenditures	GDP	Defense Expenditures as GDP %
2006	11,587,933	789,227,555	1.5
2007	11,833,996	880,460,879	1.3
2008	12,839,138	994,782,858	1.3
2009	14,567,365	999,191,848	1.5
2010	14,952,256	1,160,013,978	1.3
2011	16,196,845	1,394,477,166	1.2
2012	18,446,646	1,569,672,115	1.2
2013	19,784,158	1,809,713,087	1.1
2014	21,255,644	2,044,465,876	1
2015	22,876,604	2,338,647,494	1
2016	26,550,460	2,608,525,749	1
2017	30,779,685	3,110,650,155	1
2018	41,494,933	3,724,387,936	1.1
2019	53,349,228	4,280,381,145	1.1

Source: *Presidency of Strategy and Budget*[26]

Graph 5: The Ratio of Defense Expenditures to GDP (Thousand TL, 2006-2019)



Source: *Presidency of Strategy and Budget*[27]

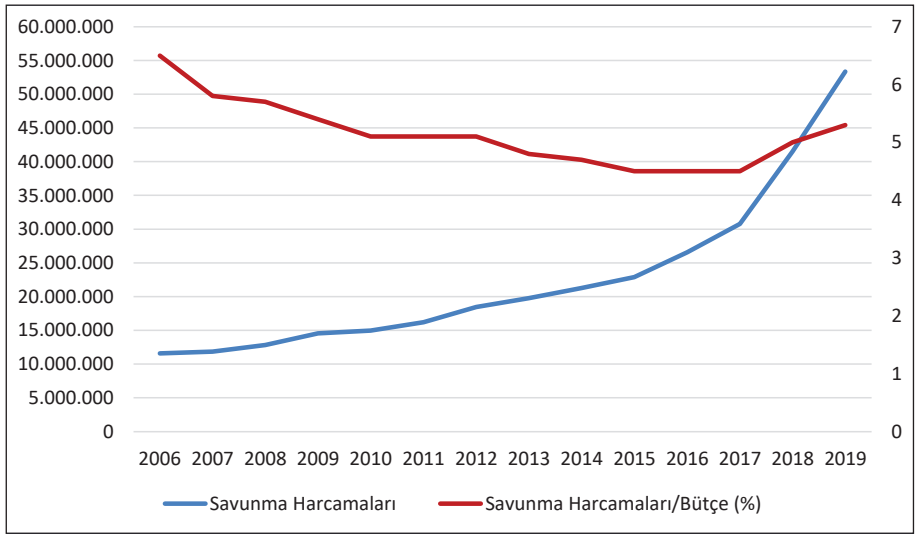
However, despite the increasing defense spending trend, the ratio of defense expenditures to GDP has remained almost steady. While defense spending had been in an upward trend since 2006, there was a dramatic increase in the budget during the years 2017-2019. Strikingly, the ratio of defense expenditures to GDP was 1.5 percent in 2006, yet decreased to 1.1 percent in 2019. Despite the increase in defense expenditures, the reason for this decline is that the increase rate of the GDP was higher compared to defense expenditures.

Table 5: The Share of Defense Expenditures in the Budget (Thousand TL, 2006-2019)

Years	Defense Expenditures	Overhead Budget Cost	Defense Expenditures/ Budget (%)
2006	11,587,933	178,126,033	6.5
2007	11,833,996	204,067,683	5.8
2008	12,839,138	227,030,562	5.7
2009	14,567,365	268,219,185	5.4
2010	14,952,256	294,358,724	5.1
2011	16,196,845	314,606,79	5.1
2012	18,446,646	361,886,686	5.1
2013	19,784,158	408,224,560	4.8
2014	21,255,644	448,752,337	4.7
2015	22,876,604	506,305,093	4.5
2016	26,550,460	584,071,431	4.5
2017	30,779,685	678,269,193	4.5
2018	41,494,933	830,809,401	5.0
2019	53,349,228	999,489,433	5.3

Source: *Ministry of Treasure and Finance*[28]

Graph 6: The Share of Defense Expenditures in the Budget (Thousand TL, 2006-2019)



Source: *Ministry of Treasure and Finance*[29]

As seen in Table 5 and Graph 6, the share of defense expenditures in the budget fell from 6.55 percent in 2006 to 5.3 percent in 2019. Again, because the GDP increased much more than defense expenditures, the decrease in the share of defense expenditures in the budget becomes understandable. Therefore, despite the increase in defense expenditures, especially since 2017, the share of defense expenditures in the budget has decreased because of the rapid increase in the expenses of the Central Administration Budget.

To sum up, the findings of the data given above on Turkey's military/defense spending trends need to be interpreted with caution. First, it can be misleading to make a general judgment that Turkey's economic growth will entail an increase in defense spending. However, the optimistic expectations for the Turkish economy in the near future are assumed to have a positive impact on defense spending. In fact, as of December 12, 2016, the calculation of the coverage of GDP has changed because of the budget structure reform made by the Turkish Statistical Institute (TÜİK) in accordance with EUROSTAT. While the change of the base year for the GDP creates some challenges in terms of making comparisons for longer periods, the new calculation methodology is expected to provide a more accurate analysis, such as revealing differences by including the expenses on 'research and development' and 'weapon systems' under the title of 'investments.'[30]

Second, the findings of the data change according to the resource. For example, in accordance with the decision taken at the 2014 Wales Summit, NATO member states pledged to spend a minimum of 2 percent of their GDP on

defense, and Turkey's defense spending increased during the period 2014-2019. According to NATO resources, Turkey's 1.45 percent of GDP in 2014 rose to 1.89 percent by 2019;[31] but according to SIPRI data, Turkey's ratio of defense expenditures to GDP was 1.9 percent in 2014 and 2.7 percent in 2019. The alteration between numbers stems from the difference between SIPRI and NATO's calculation methodology and the components of the spending.[32] In a similar manner, regarding the difference in calculation methodology, the data also changes in Turkey's budget realization. For instance, according to the 2020 Budget Realization, the ratio of defense expenditures to GDP was 1.5 percent in 2006, 1 percent in 2014 and 1.1 percent in 2019.[33] When looking at the defense spending trend in Turkey's consolidated budget, there has been a gradual decrease. However, this data can be misleading since higher interest rates lead to growth in consolidated budgets and, therefore, defense expenditures tend to decrease gradually within the consolidated budget. In addition, some of the defense expenses that are not included in the budget, such as the outgoings of the SSDF, or invisible expenses such as interest, understate the share of defense expenditure in the budget. Further, the data alters depending on the difference between the budget and its realization.

Turkey has gained a lot of knowledge and experience through the licensed production model

Changing Procurement Policy and the Arms Trade

For a long time, Turkey met its security and military needs by applying the direct foreign procurement model which depends on purchasing weapons systems and military equipment from foreign suppliers. In this model, the political attitudes of foreign governments toward Ankara played a critical role whether to sell or bring into use their own cutting-edge technologies or, as a diplomatic tool, limit the defense industry trade dialogue with Turkey. In this regard, Turkey faced many problems to overcome in order to meet its urgent military needs resulting from the different political preferences and divergent security interests on key issues such as the Middle East. Through the years, the growing conflicts between Turkey and its traditional allies inclined Ankara to change its procurement models and processes. Broadly speaking, this occurred in five simple stages.

First, Ankara adopted a 'smart acquisition' model. For instance, Turkey ordered Germany's main battle tank Leopard, Spanish and Indonesian manufacturer IPTN's CASA transport aircraft, the U.S.' subsonic anti-ship cruise missile Harpoon and France's multipurpose helicopter Cougar. Despite its advantages (i.e. needs-oriented approach, cost-benefit ratio, conscious customer), the smart acquisition model had a number of disadvantages such as

Turkey's defense spending patterns during the AK Party era embody both 'static' and 'dynamic' factors that should be evaluated in future studies with a more holistic approach

requiring deep technical knowledge, long-term planning and, more importantly, finding new alternative sources.

Second, Turkey demonstrated its eagerness to learn developing and manufacturing defense technologies to realize 'self-help.' Initially, Turkey adopted a new model called 'licensed production' that was advantageous for economic gains, developing its domestic industry and increasing local content rate, but disadvantageous for export (restrictions), design capabilities (not transferring skills) and total-packages (ready). In spite of these disadvantages, Turkey has gained a lot of knowledge and experience through the licensed production model, for instance in such projects as the Preveze-class submarine, the Stinger missile, G3 rifles, and especially the F-16 fighter jets.

Third, Turkey began to adopt a 'co-production' and 'technology transfer' model for procurement, as an offer in the tenders. This model represents a critical turning point for Turkey toward establishing its own strong, resilient, and capable defense industrial base, as it provides opportunities for technology transfer, accelerating localization, and supporting the development of domestic industry. This model does have some limitations, such as the risk of transferring outdated defense technologies, the difficulty of finding highly skilled defense workers and high licensing costs. Nevertheless, in the last two decades, Turkey vastly invested in this procurement model. The *ATAK* reconnaissance and tactical attack helicopter, *Göktürk*-1 satellite, New Type Submarine and T-70 multi-role utility helicopter are the 'co-production' and 'technology transfer' projects that are under development.

Fourth, Turkey adopted a new procurement strategy called 'unique design,' revealing its growing ambition to become an 'original design manufacturer' in the global defense sector. While implementing 'technology transfer' speeds up the process for this model, uniquely designed platforms are being developed and produced based upon the knowledge and expertise gained in the previous procurement methods. This model provides significant advantages such as export potential, systems and platforms that are open for improvement, the ability to protect and develop domestic industries and the potential for industry-university collaboration. This model also has some disadvantages: it can create foreign dependency for critical systems or major subsystems; problems might appear in preserving project continuity through the development and production processes and the initial investment cost might be very high. In any case, to date, Turkey has made huge progress in developing unique design projects: the *Bayraktar* TB2 UAVs, the new generation basic trainer and

ground attack aircraft *Hürkuş*, the national warship program MİLGEM/Ada-class corvettes, and the *GÖKBEY* Multirole Helicopter are among the major defense programs proving the rise of Turkey's domestic industry to meet the needs of the TAF and contributing to the success story of homegrown Turkish companies in domestic and international markets.

Fifth and last, Turkey's newest procurement strategy focuses more on prioritizing research and development projects. This model offers significant advantages such as the accumulation of knowledge, scientific progress, supporting universities and small- and medium-sized enterprises and minimizing or entirely ending dependency on foreign suppliers. The fact remains that this model requires long-term planning, continuous investment and thoughtful approaches to overcoming key coordination challenges.

Although its investment in research and development so far has not been sufficient, Turkey, especially in the last decade, has been slowly but steadily increasing its research and development budget.[34] In this regard, the Long Range Anti-Tank Missile System (UMTAS), Medium Range Anti-Tank Weapon System (OMTAS), SOM-J standoff (cruise) missile, *CİRİT* laser guided missile and *Alpagu* and *Kargu* models of swarming kamikaze drones should be mentioned as indigenously developed research and development projects. While it is not possible to learn the level and allocation of research and development funding given to the universities to conduct military research and development projects,[35] there has been a gradual increase in military research and development expenditures by TÜBİTAK. For instance, TÜBİTAK SAGE's research and development expenditure rose from ₺24.1 million in 2016 to ₺583.4 million in 2018, which indicates the efforts made to end Turkey's reliance on foreign sources and suppliers for its military/defense technology.

Table 6: Turkey's Military Research and Development Expenditures by TÜBITAK (Million TL)

Institution	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
TÜBİTAK Defense Industries Research and Development Institute (SAGE)	24.1	31.1	58.9	91.1	70.1	56.3	83.9	174.5	105.4	257.6	423	214.8	583.4
TÜBİTAK Space Technologies Research Institute (UZAY)	12.5	16.7	21.6	22.2	27.8	30.8	36.2	36.4	42.9	68.4	80.2	98.5	117.4
TÜBİTAK National Research Institute of Electronics and Cryptology (UEKAE)[36]	72.8	90.2	99.7	125	…	…	…	…	…	…	…	…	…
TÜBİTAK BİLGEM	…	…	…	111	157.8	199.6	208.4	319	350.2	380.9	482	410.2	549.5
TOTAL	109.4	138.1	180.2	238.3	255.6	286.7	328.5	529.9	498.5	706.9	985.2	723.5	1.250.3

Source: *TÜBİTAK*[37]

As explained above, Turkey's defense procurement strategy has been based on a five-stage model, evolving from foreign procurement to domestic procurement methods. These models reflect Turkey's arms imports-exports trends as well as the decades-long transformation from being a good customer to a leading defense manufacturer. Until the beginning of the 1990s, Turkey's procurement model relied heavily on direct foreign procurement, yet this attitude started to change during the period between 1991-1995, the years when Ankara decided to employ a co-production model. By employing this model, for the first time, Turkey, albeit to a very limited extent, has started to become an arms exporting country.

Table 7: Turkey's Arms Import (2014)

		Share of arms exports (%)		Main clients (share of exporter's total exports, %), 2010–14		
Rank	Importer	2010–14	2005–11	1st	2nd	3rd
7	Turkey	3	3	U.S. (58%)	South Korea (13%)	Spain (8%)

Source: *SIPRI Fact Sheet*[38]

Table 8: Turkey's Arms Import (2015)

		Share of arms exports (%)		Main clients (share of exporter's total exports, %), 2011–15		
Rank	Importer	2011–15	2006–10	1st	2nd	3rd
6	Turkey	3.4	2.5	U.S. (63)	South Korea (9.5)	Spain (8.9)

Source: *SIPRI Fact Sheet*[39]

Table 9: Turkey's Arms Import (2016)

		Share of arms exports (%)		Percent change from 2007–11 to 2012–16	Main clients (share of exporter's total exports, %), 2012–16		
Rank	Importer	2012–16	2007–11		1st	2nd	3rd
6	Turkey	3.3	2.5	42	U.S. (63)	Italy (12)	Spain (9.3)

Source: *SIPRI Fact Sheet*[40]

Table 10: Turkey's Arms Imports (2017)

		Share of arms exports (%)		Percent change from 2008–12 to 2013–17	Main clients (share of exporter's total exports, %), 2013–17		
Rank	Importer	2013–17	2008–12		1st	2nd	3rd
12	Turkey	2.4	3.1	-14	U.S. (59)	Spain (16)	Italy (10)

Source: *SIPRI Fact Sheet*[41]

Table 11: Turkey's Arms Imports (2018)

		Share of arms exports (%)		Percent change from 2009–13 to 2014–18	Main clients (share of exporter's total exports, %), 2014–18		
Rank	Importer	2014–18	2009–13		1st	2nd	3rd
13	Turkey	2.3	3.2	-21	U.S. (60)	Spain (17)	Italy (15)

Source: *SIPRI Fact Sheet*[42]

Table 12: Turkey's Arms Imports (2019)

		Share of arms exports (%)		Percent change from 2010–14 to 2015–19	Main clients (share of exporter's total exports, %), 2015–19		
Rank	Importer	2015–19	2010–14		1st	2nd	3rd
15	Turkey	1.8	3.7	-48	U.S. (38)	Italy (24)	Spain (19)

Source: *SIPRI Fact Sheet*[43]

According to SIPRI data that covers 1950 to 2019, Turkey only bought arms in 1981 and 1982 until the year 1995. However, the SIRPI data reveals that between 2003 and 2019, Turkey's military spending reached nearly $19 billion annually, a figure that does not contain off-budget expenses; thus, Turkey be-

came one of the world's largest arms importers during the AK Party era. For instance, as seen in the tables below, Turkey became the worlds' sixth-largest arms importer in 2012-2016 and increased its arms imports by 42 percent in 2012-2016 compared to the period 2007-2011. This increasing trend in arms imports reflects Turkey's risk perception and threat mapping since it traces back to the time of Arab uprisings, the outbreak of the Syrian civil war and the fight against the PKK/YPG and ISIS. In terms of purchasing arms, Turkey placed 12th in 2017, 13th in 2018 and 15th in 2019. Meanwhile, Turkey imported arms (2010-2019) primarily from the U.S., second from South Korea (2014-2015) or Italy (2016-2019) and third from Spain. What is striking in these trends is the dramatic decline in the shares of main clients; although the U.S. has held its place in the ranking as the main arms supplier to Turkey, its share dropped from 58 percent (2010-2014) to 38 percent (2015-2019).

Table 13: Turkey's Arms Exports (2016)

		Share of arms exports (%)		Percent change from 2007–11 to 2012–16	Main clients (share of exporter's total exports, %), 2012–16		
Rank	Exporter	2012–16	2007–11		1st	2nd	3rd
16	Turkey	0.7	0.3	180	Turkmenistan (29)	UAE (20)	Saudi Arabia (20)

Source: *SIPRI Fact Sheet*[44]

Table 14: Turkey's Arms Exports (2017)

		Share of arms exports (%)		Percent change from 2008–12 to 2013–17	Main clients (share of exporter's total exports, %), 2013–17		
Rank	Exporter	2013–17	2008–12		1st	2nd	3rd
15	Turkey	0.8	0.4	145	Turkmenistan (31)	UAE (24) Saudi	Saudi Arabia (16)

Source: *SIPRI Fact Sheet*[45]

Table 15: Turkey's Arms Exports (2018)

		Share of arms exports (%)		Percent change from 2009–13 to 2014–18	Main clients (share of exporter's total exports, %), 2014–18		
Rank	Exporter	2014–18	2009–13		1st	2nd	3rd
14	Turkey	1.0	0.4	170	UAE (30)	Turkmenistan (23	Saudi Arabia (10)

Source: *SIPRI Fact Sheet*[46]

Table 16: Turkey's Arms Exports (2019)

		Share of arms exports (%)		Percent change from 2010–14 to 2015–19	Main clients (share of exporter's total exports, %), 2015–19		
Rank	Exporter	2015–19	2010–14		1st	2nd	3rd
14	Turkey	0.8	0.5	86	Turkmenistan (25)	Oman (12)	Pakistan (12)

Source: *SIPRI Fact Sheet*[47]

Tables 13-16 show the changes in Turkey's arms export from 2007 to 2019. As the numbers indicate, Turkey became one of the largest arms exporters in the world during the AK Party era, placing 16th in 2016, 15th in 2017 and 14th in 2018 and 2019. The primary three countries to which Turkey exported arms from 2010-2019 are the UAE, Turkmenistan and Saudi Arabia; while Turkmenistan has held its place in the ranking, the UAE and Saudi Arabia were replaced by Pakistan and Oman in 2019.

With regard to exports, it must be mentioned that SIPRI also issues "Top 100 Arms-producing and Military Services Companies in the World" (excluding China), which is an important indicator for the rise of the Turkish defense industry during the AK Party era. The first defense company to become capable of entering this list was ASELSAN; ranked in 92nd place in 2010 (103rd in 2009) with a production worth $760 billion and a total share of 0.1 percent. ASELSAN placed 76th in 2014 (71st in 2013 with 1,130 billion), the same year TUSAŞ became the second Turkish company to enter the list and placed 95th with a production worth $850 billion. In 2018, both companies reached higher ranks; ASELSAN reached 54th place and TUSAŞ 84th.[48] It should be noted that *Defense News* also ranks the world's largest defense companies, and in its "Top 100" list prior to 2002 there were no Turkish companies at all. However, there are now seven Turkish companies in the Top 100 for 2020: ASELSAN (48th), TUSAŞ (53rd), BMC (89th), ROKETSAN (91st), STM (92nd), FNSS (98th) and HAVELSAN (99th).

The figures, rankings, Turkey's arms import and export levels, and the internationalization of the Turkish defense companies demonstrate how Turkey has moved towards from being a well-paying customer to a competitive exporter.

Conclusion: The Prioritization of Defense to Promote a New and Realistic Grand Strategy

Turkey's defense spending patterns during the AK Party era embody both 'static' and 'dynamic' factors that should be evaluated in future studies with a more holistic approach. Briefly, the factors involved in deciphering Turkey's defense spending can be summarized as follows:

- Risk perception and threat mapping (defensive purposes: preventive or pre-emptive measures; offensive purposes: proactive measures or retaliation);
- National interests (strategic reasons such as the dispute in the Aegean Sea);
- Priorities of the government (political and strategic motives; leverage for political bargaining and promoting the country's position in the international theater; these priorities became a major issue in domestic politics);
- Diplomatic tools (achieving strategic flexibility in foreign, security and defense policies);
- Attitudes of relevant actors (friends and foes; state and non-state actors);
- Self-reliance in defense (achieving self-sufficiency in order to tackle the problems owing to heavy reliance on foreign imports and foreign suppliers, eliminating dependency on single source strategy);
- Military deterrence on a regional/international scale (requires realizing the objectives of 'localization,' 'nationalization' and 'strategic autonomy');
- Power projection (maintaining the current power status or pursing a new power position for regional and international objectives);
- Engagements with regional and international organizations (i.e. NATO commitments);
- Economic benefits and new trade partnerships (a stimulus for economic growth, industrial development, labor force);
- Strengthening competitiveness (in economy, technology, human resources, expertise and skills);
- Transforming into a high-tech country (technological incentives and innovation);
- Becoming a leading defense manufacturer and arms exporter (strengthening the balance of payments; benefitting from new opportunities made possible by the internationalization of the Turkish defense companies).

While the factors mentioned above provide the ground to analyze Turkey's defense spending trends, the fact remains that the AK Party's defense policy indicates a more realistic approach based on the new understanding of 'self-help' in defense, rather than the decades-long idealism built upon expectations of cooperation and partnerships via traditional alliances. The divergence of Turkey's interests from those of its long-term allies within NATO have led to changes in Ankara's defense mentality which had previously relied extensively on the foreign procurement model. Though Ankara had faced many problematic outcomes of being dependent on foreign suppliers since the Cold War period, particularly the U.S. under the security umbrella of NATO, the rapidly deteriorating conflicts of interest between Turkey and its allies during the 2000s created far worse impacts on Turkey's national security. Indeed, to eliminate the long-standing existential terror threat, Ankara has realized the urgent need for self-reliance in national defense. Thus, Ankara's new defense strategy is shaped by the awareness of the risks at hand and the threats of dependence on other countries' military equipment.

Therefore, investing in building and developing the Turkish defense industry has become a priority during the AK Party era, one that stems from the changing conditions and dynamics of newly emerging conflicts. For long years, Turkey's main focus had been concentrated within its borders in order to tackle the terrorism threat which had led to an increase in domestic security spending. Under the changing conditions of the new regional security environment, Turkey has become a country conducting continuous and simultaneous military operations on five different fronts: the safe zone and temporary military bases in Northern Iraq, the engagement areas of Operation Euphrates Shield, Olive Branch and Peace Spring in Syria and the fronts opened in Libya. In addition, Turkey has been conducting joint military exercises with Azerbaijan with regard to the serious security threat posed by Armenia, while conducting drills in the Aegean and Eastern Mediterranean due to the tensions escalating with Greece and Southern Cyprus. As a matter of new conjecture, Turkey's aim to increase its military deterrence on a regional and international scale have led to an increase in defense spending as well as to a change in its arms trade and outsourcing policy. This is evident in the case of the Turkish troops deployed in Afghanistan, Libya, Lebanon, Syria, Iraq, Somalia, Qatar, Mali and the Central African Republic.

AK Party's increasing interest in defense reveals a change of understanding in the 'grand strategy' which prioritizes 'defense' not only in terms of becoming a military power, but also using the opportunities to boost political, economic, diplomatic, technological and industrial gains

On a final note, the main motivation of investing more in Turkish defense industry during the Erdoğan era is much more related with AK Party's quest for realizing 'self-reliance' in defense, the fundamental principle of an independent sovereign state. While self-reliance has become the basic necessity to accomplish a proactive security and defense strategy, 56 meeting certain amount of localization, nationalization and strategic autonomy have become the new priorities of Turkey's defense industry. However, the reason to invest more in defense cannot be only explained by Turkey's continuing cross-border, counter-terrorism and offshore drilling operations based upon its right to self-defense granted by international law, or the military bases opened in different places (i.e. Qatar and Mogadishu) as a reflection of its desire to become a global player. Overall, AK Party's increasing interest in defense reveals a change of understanding in the 'grand strategy' which prioritizes 'defense' not only in terms of becoming a military power, but also using the opportunities to boost political, economic, diplomatic, technological and industrial gains.

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27. The graph is formed based on the data available at the website of Presidency of Strategy and Budget. See, "2020 Yılı Bütçe Gerekçesi: 2006-2019," p. 10-13.

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33. "2006-2019: 2020 Yılı Bütçe Gerekçesi," p. 10.

34. According to the 2020 Central Administration Budget, the total funding for research and development is ₺14 billion 307 million (initial allowance). In 2019, research and development expenditures to

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36. On September 4, 2010, the TÜBİTAK National Research Institute of Electronics and Cryptology (UEKAE) and TÜBİTAK Information Technologies Institute (BTE) merged under the umbrella of TÜBİTAK Informatics and Information Security Research Center (BİLGEM).

37. The data for the years 2012-2016 were compiled from the Annual Activity Reports of TÜBİTAK. See TÜBİTAK, *Faaliyet Raporları*, retrieved from https://www.tubitak.gov.tr/tr/icerik-faaliyet-raporlari. For data for the period 2006-2012, see, Nurhan Yentürk, "Measuring Turkish Military Expenditure," *SIPRI Insights on Peace and Security*, (March 2014) retrieved from https://www.sipri.org/sites/default/files/files/insight/SIPRIInsight1401.pdf, p. 7.

38. "SIPRI Fact Sheet: Trends in International Arms Transfers 2014," *Stockholm International Peace Research Institute (SIPRI),* (February 2015), retrieved from https://www.sipri.org/sites/default/files/files/FS/SIPRIFS1503.pdf, p. 4.

39. "SIPRI Fact Sheet: Trends in International Arms Transfers 2015," *Stockholm International Peace Research Institute (SIPRI),* (February 2016), retrieved from https://www.sipri.org/sites/default/files/SIPRIFS1602.pdf, p. 4.

40. "SIPRI Fact Sheet: Trends in International Arms Transfers 2016," *Stockholm International Peace Research Institute (SIPRI),* (February 2017), retrieved from https://www.sipri.org/sites/default/files/Trends-in-international-arms-transfers-2016.pdf, p. 4.

41. "SIPRI Fact Sheet: Trends in International Arms Transfers 2017," *Stockholm International Peace Research Institute (SIPRI),* (March 2018), retrieved from https://www.sipri.org/sites/default/files/2018-03/fssipri_at2017_0.pdf, p. 6.

42. "SIPRI Fact Sheet: Trends in International Arms Transfers," *SIPRI*, (March 2019), retrieved from https://www.sipri.org/sites/default/files/2019-03/fs_1903_at_2018.pdf, p. 6.

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