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INTERNATIONAL DEFENCE

MAY 2026

ANALYSIS

TÜRKİYE'S
DEFENSE
INDUSTRY
MIRACLE



DIGITAL EDITION

SAHA 2026
SPECIAL EDITION



SECURING BEYOND THE HORIZON

Steel Dome is ASELSAN's multi-layered, interoperable air defense concept, delivering full-spectrum protection and superior operational effectiveness.

aselsan



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AND WON'T STOP COMING 1

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THE DRONE THAT WON'T BE JAMMED

AND WON'T STOP COMING

Baykar's K2 Kamikaze UAV flies in swarms, hunts without GPS, and carries enough punch to reshape the economics of modern warfare. Meet the machine changing the rules of the skies.

Over two windswept days above the Gulf of Saros in western Türkiye, five aircraft took off from the Keşan Flight Training and Test Center and did something remarkable: they talked to each other without talking to anyone on the ground. No GPS. No human hand on a joystick. Just five K2 Kamikaze UAVs, flying in perfect formation — right echelon, line, V-shape — guided entirely by their own artificial intelligence.

This was not a proof-of-concept experiment staged for cameras. This was Baykar, the Turkish aerospace juggernaut that has dominated the global drone market for four consecutive years, announcing that the next chapter of autonomous warfare has quietly already begun.

"Five drones. No GPS. No human controller. Just AI, cameras, and the kind of cold precision that makes adversaries rethink their air-defense budgets."

BUILT TO SURVIVE THE JAMMING

The single most underreported detail about the K2 is not its 200-kilogram warhead or its 2,000-kilometer range. It is the fact that you cannot simply turn it off by flipping a switch. Modern electronic warfare doctrine has long held that satellite navigation jamming is the great equalizer against drone swarms. The K2 was built with that threat in mind from day one.

When GPS signals disappear — jammed, spoofed, or simply absent over a contested airspace — the K2 switches seamlessly to terrain-referenced visual navigation. Its gimbal camera and an underside night-vision camera scan the ground below, matching what they see against stored maps to pinpoint the aircraft's exact position. The drone essentially navigates the way a

seasoned bush pilot does: by looking out the window. It just does it faster, in the dark, and without blinking.

K2 SPECIFICATIONS

800kg
Max Takeoff Weight

200kg
Warhead Payload

2,000+ km
Range

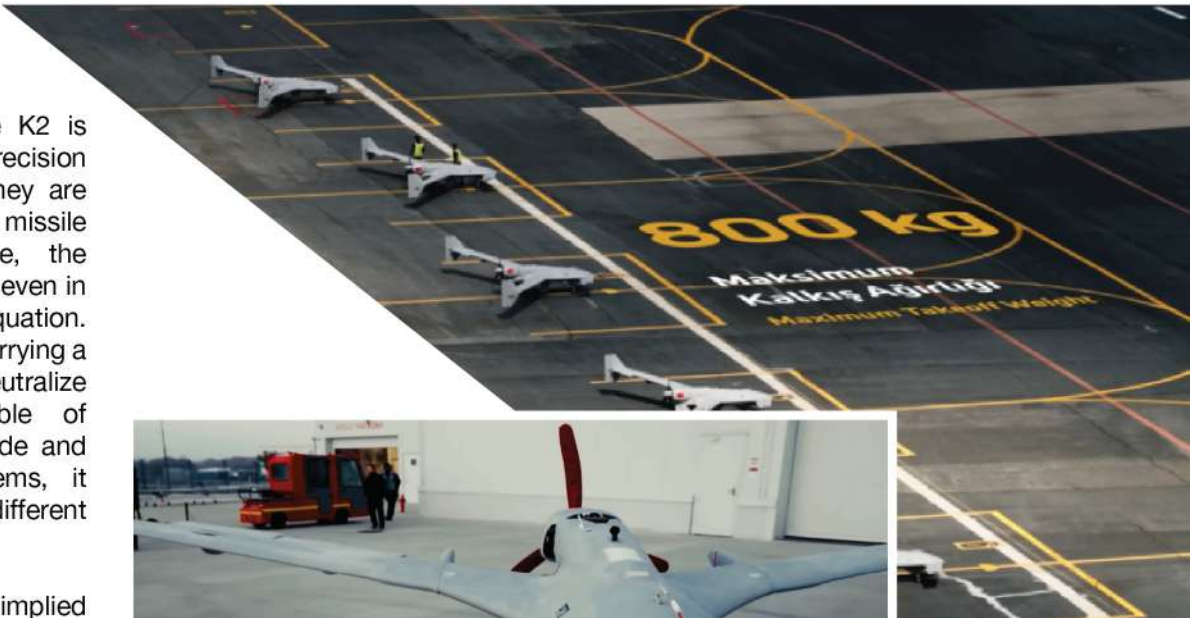
13+ hrs
Endurance

200+ km/h
Top Speed

THE ECONOMICS OF OVERWHELM

Baykar's philosophy with the K2 is refreshingly blunt. Expensive precision munitions have a problem: they are expensive. When a \$3 million missile intercepts a \$50,000 drone, the attacker wins the financial war even in defeat. The K2 flips that equation. Mass-produced at low cost, carrying a warhead large enough to neutralize critical targets, and capable of operating in swarms that divide and overwhelm air-defense systems, it represents a fundamentally different kind of threat calculus.

And unlike the one-way ticket implied by its "kamikaze" designation, Baykar's engineers are already working on a returnable variant — a platform that can release its munitions and fly home, ready to fly again. It is expendable only until it doesn't need to be.



AN EMPIRE BUILT ON EXPORTS

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DID YOU KNOW?

The K2 Kamikaze UAV is the largest loitering munition in its class by takeoff weight — yet its short-runway capability means it can be deployed from improvised field strips, giving frontline commanders a strategic strike asset that fits in a truck convoy rather than requiring an airbase.





INTERNATIONAL DEFENCE ANALYSIS (IDA)

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FRENCH NAVY DOUBLES DOWN ON S-100 SHIPBORNE DRONE ISR

A follow-on order for five Camcopter systems cements the S-100 as the French Navy's shipborne ISR platform of choice across every major vessel class



France's DGA defence procurement agency has ordered five additional Schiebel Camcopter S-100 systems for the French Navy, bringing its total fleet to eight systems — 16 individual aircraft. Naval Group leads the contract as prime contractor and system integrator, deploying the drones aboard FREMM-class frigates alongside its Steeris MS mission management system. Deliveries begin in 2026.

The S-100 is not new to French decks. The Navy has operated the platform since 2012, first aboard the Gowind-class patrol vessel L'Adroit. In 2019 it moved to the Mistral-class assault ship Dixmude — marking the first integration of a rotary-wing drone into a European naval combat management system. Two more systems followed in 2020 aboard Mistral and Tonnerre.

Moving the S-100 onto FREMM frigates is a meaningful step up. These are France's primary blue-water surface combatants, built for high-end multi-domain operations. Embedding persistent ISR overhead on a FREMM extends the frigate's sensor reach

without adding crew or compromising the ship's core mission profile.

"This follow-on order reflects the system's capabilities, as well as maturity and the confidence placed in its performance at sea," said Lubos Sramek, director of Schiebel Aéronaval SAS in Toulon. "Its compact footprint and proven shipborne performance enable flexible deployment across a wide range of missions and different classes of ships."

S-100 SPECS

50kg
MAX PAYLOAD

6–10 hrs
ENDURANCE

100 kts
TOP SPEED

55 kts
LOITER SPEED

200kg
MAX T/O WEIGHT

None Required
LAUNCH SYSTEM

DID YOU KNOW?

The S-100's 2019 integration aboard the Dixmude was a European first — the maiden operational deployment of an unmanned rotary-wing aircraft into a naval combat management system on the continent. The same platform has since been selected by the Hellenic Navy for its FDI frigates, making it the go-to shipborne drone across two NATO Mediterranean fleets.



RAFALE F5

A billion-euro partnership collapsed when France refused to share its fighter jet secrets. Now the French defence budget is paying the price — and delivery timelines are stretching

NO TECH, NO DEAL
UAE

EUR 3.5B
UAE Funding Withdrawn

EUR 5B
Total F5 Programme Cost

80
Rafales Ordered by UAE

20%
Thrust Gain from M88 T-REX

The deal looked good on paper. France needed money to develop the next-generation Rafale F5 fighter jet. The United Arab Emirates operator of 80 Rafales and one of the world's most enthusiastic buyers of advanced military technology was willing to contribute up to EUR 3.5 billion of the programme's roughly EUR 5 billion price tag. All Paris had to do was let Abu Dhabi in on the technology. France said no. And with that, the partnership was over.

The breakdown, confirmed by La Tribune, was finalised at the end of December 2025 following a summit meeting between President Emmanuel Macron and Sheikh Mohammed bin Zayed that, by multiple accounts, went very badly. The UAE wanted genuine industrial involvement access to optronic systems, participation in development work, technology

transfer. France offered funding partnership with none of those returns. Abu Dhabi refused to write a cheque for nothing.

France offered investment without industrial returns. Abu Dhabi refused to write a cheque for nothing.

The French Ministry of Armed Forces must now finance the Rafale F5 alone, folded into the updated Military Programming

Law alongside EUR 36 billion in additional defence spending. But sources within the ministry describe the result frankly: the financing will be spread thin. Deliveries of aircraft upgraded to the F5 standard will be delayed. In French defence circles, this practice has a name — spreading jam on toast.



WHAT THE F5 ACTUALLY BRINGS

The stakes make the lost funding all the more painful. The Rafale F5 is not a minor update. It is a generational leap: a Thales RBE2 XG radar built on gallium nitride, an upgraded SPECTRA electronic warfare suite, new optoelectronic sensors, conformal fuel

tanks, and the Safran M88 T-REX engine promising a 20% increase in afterburner thrust. Perhaps most significantly, the F5 standard was intended to integrate a UCAS escort drone — an autonomous wingman capability

that would place France among a tiny group of nations operating true manned-unmanned combat teaming. Dassault CEO Eric Trappier has confirmed the UCAS element has not yet been officially launched, and without UAE co-financing, its future is now murkier.

FRANCE ALREADY STRETCHED THIN — AND THE F5 MAKES IT WORSE

The Rafale F5 financing crisis does not arrive in isolation. France has been managing a structural mismatch between its ambitions and its defence budget for years. By the end of 2022, only 20% of the French Rafale fleet had been equipped with RBE2 AESA radars — a fact that prompted Paris to

sell Rafales to Croatia in part just to fund upgrades to its own aircraft.

By 2023, just 25 aircraft had the new radar installed. The goal of reaching 75 units by 2030 depends on sustained funding that is now under greater pressure than ever. The

broader military programming picture is similarly tight: the updated LPM adds EUR 36 billion to defence spending, but insiders say it is still insufficient given new threats and the operational demands being placed on French forces across multiple theatres.

ON THE BUDGET REALITY

The financing of the Rafale F5 will be stretched out over time, with deliveries of aircraft upgraded to the F5 standard delayed. This is a long-standing practice within the armed forces to compensate for budget shortfalls.

THE DIPLOMATIC FALLOUT & THE CAUTIOUS RECOVERY

The Rafale F5 dispute was not just a procurement disagreement. It touched something deeper in the France-UAE relationship. The two countries share defence agreements, French forces are stationed on Emirati soil, and Paris has long presented itself as a uniquely reliable security partner in a region where reliability is rare.

F5 deal instead produced a difficult meeting in which the Sheikh expressed his frustration at length. The French side was perceived as arrogant; the Emirati side felt it was being asked to bankroll technology it would never be allowed to see.

What restored the relationship was not diplomacy but operational reality. As the conflict in Iran escalated, French Air Force pilots flying out of UAE bases began

neutralising Iranian Shaheed drones striking Emirati territory. The two countries, separated by just 55 km at the Strait of Hormuz, found themselves side by side in a live threat environment. France delivered concrete support when it counted. That, according to multiple sources, is what rebuilt trust.

BRIEF NOTE

The UAE's 80-aircraft Rafale order is the largest single-country export order the jet has ever received. That scale made Abu Dhabi a natural candidate to co-fund the F5 upgrade — but it also meant that when the deal collapsed, France lost its most credible external financing partner for the programme in one stroke.

WILL THE UAE RETURN TO THE TABLE?

For now, the answer appears to be: not soon. Several sources close to the discussions believe it is unlikely that Abu Dhabi will re-engage on F5 financing before 2027 at the earliest. The diplomatic relationship has been repaired, but the underlying disagreement over technology access has not been resolved. France is not ready to share what the UAE wants. The UAE is not willing to pay for what

France is willing to offer.

What the episode reveals is a tension embedded in French defence export strategy. France sells its most advanced weapons but not the knowledge behind them. For customers like the UAE, which increasingly see defence procurement as an industrial development opportunity as much

as a security transaction, that model is growing less acceptable.

The Rafale is, by all accounts, an exceptional aircraft. The F5 will be more exceptional still. But a programme that was supposed to be a model of mutually beneficial co-investment has instead become a case study in how quickly defence partnerships can unravel when the terms of trust are left undefined.



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INTEGRATED & MULTI-DOMAIN
DEFENSE CONCEPT AT
SPOTLIGHT AT SAHA 2026





A Vision for Next-Generation Warfare

From contested airspace to the depths of the maritime domain and beyond, today's operational landscape demands a level of integration and responsiveness that redefines how defense systems are conceived and deployed. In response to this shift, ASELSAN is preparing to showcase its next-generation capabilities at SAHA 2026, presenting a cohesive vision built around integration, adaptability, and technological depth under its "Securing Beyond" approach.

A Comprehensive Multi-Domain Portfolio

With a comprehensive portfolio spanning underwater, naval, air, land, and space domains, ASELSAN continues to reinforce its role as a key player in the international defense ecosystem. Its globally recognized

systems, ranging from naval combat solutions and avionics to radar, electronic warfare, electro-optics, communications, and space technologies, demonstrate a holistic approach to modern warfare requirements. This multi-domain expertise enables synchronized and coordinated operations across diverse theaters, enhancing situational awareness and accelerating decision-making processes.

Spotlight on New Capabilities and Launch Ceremonies

At SAHA 2026, ASELSAN will place particular emphasis on its new capabilities and systems by unveiling next-generation technologies through dedicated launch events. At the heart of its exhibition presence will also be the

Steel Dome concept, underscoring the company's leadership in delivering integrated, multi-layered air defense solutions designed to provide comprehensive and highly effective protection.

Steel Dome: An Integrated Shield

Steel Dome represents an indigenous, fully integrated air and missile defense architecture engineered to counter a wide spectrum of threats, from low-altitude and short-range to medium- and long-range engagements. Designed to address evolving challenges such as unmanned aerial systems, combat aircraft, and missile threats, the system embodies a layered and adaptive defense philosophy.

The architecture is structured around three core pillars: sensors, command and control, and effectors. Advanced sensing capabilities are

delivered through systems such as ALP radars, infrared search and track (IRST) solutions, and electronic support measures, ensuring long-range detection and tracking. At the core of the system, the HAKİM AI-based command and control infrastructure enables real-time data fusion, generating a unified air picture and facilitating coordinated engagement decisions with high precision and speed.

Layered Effectors and Networked Power

Steel Dome's layered effector structure incorporates a range of systems, including İHTAR, ŞAHİN, KORKUT, HİSAR, and SİPER; each optimized for different threat types and engagement ranges. This tiered configuration maximizes operational effectiveness by ensuring that threats

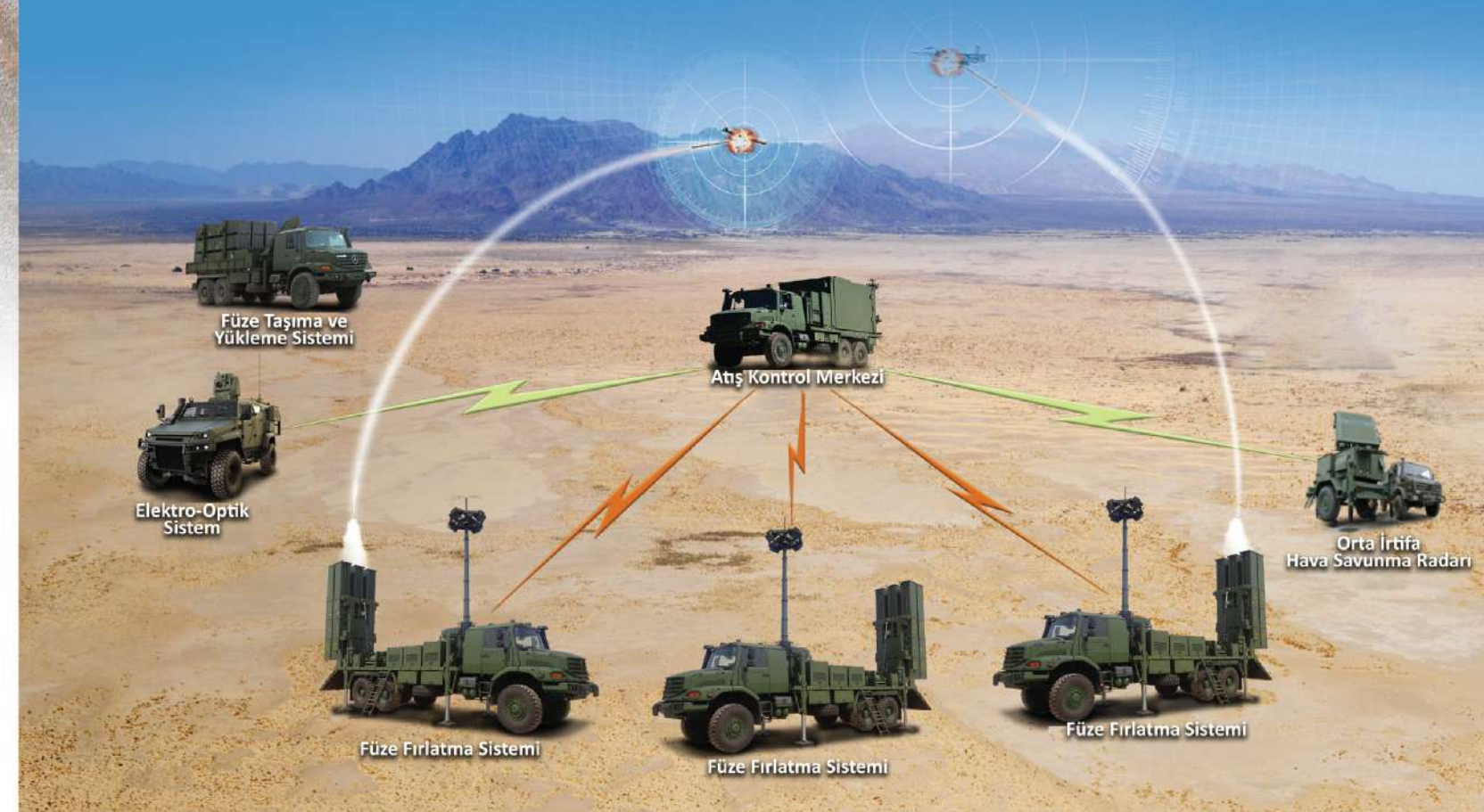
are addressed at the most appropriate layer. Complementing these capabilities, a military-grade communication backbone guarantees secure, resilient connectivity across all system components.

A defining feature of Steel Dome is its system-of-systems architecture, where kinetic and non-kinetic elements operate in full synchronization. Supported by AI-driven decision-making processes and real-time air picture generation, the system delivers a highly responsive and adaptive defense capability suited for modern, high-tempo combat environments.

Innovation on Display at SAHA 2026

ASELSAN's presence at SAHA 2026 will not only highlight its existing capabilities but also signal its continued commitment to innovation through the introduction of next-generation technologies. In doing so, the company reaffirms its position as a forward-looking defense technology provider shaping the future of integrated and multi-domain warfare.

In this context, ASELSAN's integrated approach, embodied by solutions such as Steel Dome, stands as a compelling example of how advanced technologies can be orchestrated to meet the increasingly complex demands of contemporary defense scenarios.



Türkiye's DEFENSE INDUSTRY MIRACLE

THE GENESIS OF A TECHNO NATIONALIST PARADIGM

Over the past two decades, Türkiye has transformed from a structurally dependent NATO client state into a globally competitive, middle-power defense exporter. Historically reliant on foreign procurement, Türkiye's vulnerabilities were exposed by Western arms embargoes in the 1970s and 1990s. This catalyzed a "techno-nationalist" consensus among the strategic elite: sovereign foreign policy requires sovereign defense manufacturing. Today, Türkiye's defense sector is a primary instrument of

statecraft, capable of producing fifth-generation fighters, autonomous drones, advanced warships, and AI-driven air defense systems.



THE STRATEGIC PIVOT (2004) AND ECONOMIC EXPANSION

The modern era of Turkish defense production was born in May 2004, when the government abruptly canceled \$11 billion in foreign acquisitions. The new mandate prioritized indigenous development, technology transfer, and intellectual property ownership.

Institutional Reorganization: The creation of the Secretariat of Defense Industries (SSB), reporting directly to the Presidency, streamlined procurement and R&D. Indigenization rates soared from 20% in 2002 to over 80% today.

Economic Impact: The sector now comprises over 3,500 firms and 100,000 personnel. Export revenues are critical for funding capital-intensive R&D. Defense exports surged past \$10.5 billion in 2025, with a massive \$17.9 billion in new contracts. Five Turkish "national champions"

(ASELSAN, TUSAŞ, Baykar, Roketsan, MKE) currently rank among SIPRI's top 100 global arms producers.



THE UNMANNED REVOLUTION

Türkiye identified a global market gap between expensive American drones and less reliable Chinese alternatives, successfully capturing an estimated 65% of the global combat drone market.

Bayraktar TB2: This platform disrupted modern warfare by neutralizing sophisticated air defense architectures in Libya, Syria, Karabakh, and Ukraine.

Next-Generation Systems: The portfolio rapidly expanded to heavier platforms (Anka, Aksungur, Akinci)

and culminated in the Bayraktar KIZILELMA, an autonomous, low-observable, jet-powered unmanned fighter aircraft that recently demonstrated "loyal wingman" capabilities.



AEROSPACE AUTARKY & THE PROPULSION CHALLENGE

The National Combat Aircraft (MMU) program birthed the KAAN, a twin-engine, fifth-generation stealth fighter designed for air superiority. Having completed its maiden flight in 2024, it aims to replace Türkiye's F-16 fleet.

The Vulnerability: The KAAN relies on American-made GE F110 engines. Due to CAATSA sanctions, serial production is threatened. Achieving true strategic autonomy hinges on Türkiye's ability to master indigenous engine production (e.g., TEI's TF35000 turbofan project) by the early 2030s.



The "BLUE HOMELAND" (MAVI VATAN) NAVAL RESURGENCE

Türkiye has dramatically expanded its maritime power projection capabilities to secure its regional interests across the Mediterranean and Black Seas.

MİLGEM Project: Evolved from producing Ada-class corvettes to the new 3,000-ton İstif-class frigates and the upcoming 8,300-ton TF-2000 air defense destroyers.

Aviation Vessels: The TCG

Anadolu was repurposed into the world's first dedicated drone carrier after Türkiye was removed from the F-35 program. Furthermore, construction has begun on the MUGEM, a massive 60,000-ton national aircraft carrier.

Subsurface Power: Türkiye is transitioning from co-producing German Reis-class submarines to launching the MİLDEN project for fully indigenous air-independent propulsion (AIP) submarines.



LAND WARFARE & THE "STEEL DOME"

Armored Mobility: Turkish land systems (BMC, Otokar, FNSS) are highly battle-tested and widely exported, heavily penetrating European markets (e.g., massive contracts with Romania and Hungary). Türkiye has also launched serial production of the Altay Main Battle Tank.

The Steel Dome (Çelik Kubbe): Unveiled in 2024, this AI-driven, multi-layered air defense architecture integrates kinetic weapons, electronic warfare, and directed-energy weapons (like the Gökberk laser system) under a unified, autonomous command network to neutralize complex threats like drone swarms and ballistic missiles.

DRONE DIPLOMACY & SOFT POWER

Defense exports have fundamentally recalibrated Türkiye's foreign policy, creating deep structural interdependencies globally.

Africa: Türkiye provides affordable, NATO-standard equipment without

Western political conditions, shifting the balance of power against insurgencies in nations like Somalia, Mali, and Ethiopia.

The Gulf & Eurasia: Massive tech-transfer agreements with Saudi

Arabia and exports to Qatar and the UAE secure Gulf partnerships. Concurrently, Türkiye is checking Russian hegemony by integrating defense systems with Turkic states like Azerbaijan, Kazakhstan, and Uzbekistan.

HUMAN CAPITAL & FUTURE OUTLOOK

To counter the "brain drain" of the late 2010s, Türkiye launched aggressive retention programs and cultural campaigns like TEKNOFEST, the world's largest aviation and space festival. By democratizing access to defense tech and instilling techno-national pride, Türkiye has successfully triggered a "reverse brain drain," repatriating elite engineers.

Türkiye's defense industry is a 21st-century industrial miracle that has reshaped global arms hierarchies. However, absolute strategic autonomy remains an aspirational goal. The long-term viability of this "miracle" depends heavily on overcoming

critical metallurgical and microelectronic bottlenecks—most notably, the successful development of indigenous aircraft and tank engines. If these technological gaps are bridged in the coming decade, Türkiye will cement its status as a primary, independent architect of the multipolar security order.



Swi+zerland

EYES THE EXIT ON ITS \$2.1 BILLION PATRIOT DEAL

Bern froze payments, Washington kept spending the money. Now a landmark defence contract is on the verge of collapse and Europe is the alternative

\$2.1B
Original Contract Value

\$3.8B
Revised Cost Estimate

2034
Earliest Delivery Now

~\$780M
Already Transferred

Switzerland's \$2.1 billion Patriot air defence purchase passed its 2022 referendum by just 8,670 votes — a margin thin enough to reflect every doubt voters had about cost, neutrality and foreign dependence. Those doubts are now looking well-founded.

The Swiss Federal Council was formally briefed on April 1, 2026, on a procurement that has gone seriously off track. Deliveries originally scheduled for 2026-2028 have been pushed back to 2034 at the earliest, following a U.S. decision in July 2025 to reprioritise Patriot supplies to Ukraine. Costs have ballooned from under \$2.2 billion to nearly \$3.4 billion. Bern suspended payments in autumn 2025 — and for the first time, cancellation is now officially on the table.

FROZEN PAYMENTS BUT THE MONEY KEPT MOVING

Switzerland's leverage is weaker than it looks. Under the U.S. Foreign Military Sales system, Swiss payments flow into a pooled trust fund managed entirely by Washington covering the Patriot deal, the F-35A fighter order, and F/A-18 sustainment. After Bern froze Patriot payments, U.S. authorities simply redirected hundreds of millions in F-35A funds toward Patriot expenditure instead. The freeze, in practice, was bypassed.

With **\$730M–\$840M** already transferred and no defined reimbursement terms if the contract is cancelled, Switzerland cannot easily walk away or clearly calculate what walking away would cost. To protect its F-35A programme from the fallout, Bern made a small emergency advance payment in late March 2026 to keep the shared trust fund above the critical liquidity threshold.

LOOKING TO EUROPE

Switzerland has quietly issued a formal request for information to alternative long-range air defence suppliers with one firm condition: production must be based in Europe. The move signals a deliberate shift away from U.S.-controlled supply chains and FMS financial mechanics. Candidates include the Franco-Italian SAMP/T Mamba system and MBDA's Aster missile family. A final Federal Council decision is expected by summer 2026.

DID YOU KNOW?
Patriot missiles have been consumed at an extraordinary rate in the conflicts in Ukraine and the Middle East, driving global demand to record highs. Every additional buyer from Ukraine to Gulf states compresses the production queue further, making Switzerland's 2034 delivery window not an anomaly, but the new reality for Patriot customers worldwide.

We are negotiating all possible options with the United States — and that includes a potential termination.

PAKISTAN LANDS FIGHTERS IN SAUDI ARABIA

A DEPLOYMENT THAT SIGNALS SOMETHING BIGGER

Fighter jets at King Abdulaziz Air Base are the visible part. The deeper story is a quietly maturing defence partnership reshaping airpower in the Gulf.

Pakistan Air Force fighter and support aircraft have touched down at King Abdulaziz Air Base in Saudi Arabia's Eastern Province — a deployment announced by the Saudi Ministry of Defence under the framework of the 2025 Strategic Mutual Defence Agreement. The official language is measured: joint coordination, operational readiness, regional stability. But the move carries weight well beyond the press release.

Pakistan has maintained defence ties with Saudi Arabia for decades, including past rotational deployments of PAF assets. What is different now is the formal architecture behind the arrangement. The 2025 agreement elevated the relationship from episodic cooperation to structured integration and the arrival of combat aircraft at a Saudi base is the first visible expression of what that means in practice.

This is a shift from symbolic cooperation toward genuine, structured airpower integration between two of the Islamic world's most capable militaries.

THE J-10C CASE WHY ANALYSTS ARE WATCHING PROCUREMENT NEXT

Defence analysts assessing the deployment argue that its long-term significance will depend heavily on what comes after. A rotational presence of PAF assets is useful; a permanent, dedicated force would be transformative. The platform most discussed in that context is the Chengdu J-10C— China's modern multirole fighter, already in PAF service, equipped with AESA radar, beyond-visual-range missile (BVR) capability and a capable electronic warfare suite.

The emerging assessment: Pakistan should acquire additional J-10Cs, with Saudi financing, to enable the permanent basing of at least two squadrons in the Kingdom. That model would give Riyadh persistent air coverage and rapid-response capability without bearing the full procurement cost while allowing Pakistan to expand its fleet in alignment with real operational requirements.

WHAT A PERMANENT PRESENCE WOULD CHANGE

A two-squadron forward deployment would do several things at once. It would create a permanent airpower hub in the Eastern Province capable of handling both routine air policing and high-tempo contingencies. It would deepen PAF-RSAF interoperability through continuous joint training cycles rather than occasional exercises. And it would strengthen deterrence credibility across a region where the threat calculus has shifted sharply in recent months particularly given the proximity of Iranian airspace and the ongoing regional tensions.

For Pakistan, the arrangement offers a way to modernise and expand its air force with external financial support, without the fiscal strain of unilateral procurement. For Saudi Arabia, it locks in a capable, battle-tested partner with a platform that does not depend on U.S. export controls or Western supply chains.

Whether the Saudi-financed J-10C procurement model advances will become clear in the months ahead. What the King Abdulaziz deployment has already made plain is that the Pakistan-Saudi defence relationship is no longer built on goodwill alone — it now has treaties, aircraft and runway behind it.



BRIEF NOTE

The J-10C is the only non-Russian, non-Western fighter jet to have been credited with a beyond-visual-range air combat kill in active service during the 2025 India-Pakistan aerial confrontation, which included the shoot-down of an Indian Rafale. That operational record has significantly raised the platform's profile among Gulf defence planners evaluating alternatives to F-16s and Eurofighters.



The TYPHOON

JUST GOT A NEW ANSWER TO THE DRONE THREAT

BAE Systems fires APKWS laser-guided rockets from a Eurofighter for the first time. With Iranian drones already filling Gulf skies, the timing could not be sharper

The mismatch has been obvious for years: a \$500 Iranian Shahed drone, brought down by a \$1 million missile. Every intercept is a financial victory for the attacker. BAE Systems took a direct swing at that problem when it test-fired APKWS laser-guided 70mm rockets from a RAF Eurofighter Typhoon at its Warton flight test centre in Lancashire — the first time the weapon has been fired from the platform.

The trial used a RAF test and evaluation Typhoon to strike a ground-based target at a UK military range. The next step — testing against airborne drone targets — is already planned. A proximity-fuzed FALCO variant of the APKWS is designed specifically for aerial engagements, and Typhoons already carry targeting pods capable of



laser-designating both ground and aerial targets.

This demonstrates a game-changing capability and a cost-effective solution that would enhance Typhoon's already impressive range of weapons capabilities.

BAE Systems had been investigating APKWS integration since at least September 2024, when feasibility studies were confirmed. The urgency behind that work is not hard to understand. RAF Typhoons — alongside aircraft from Saudi Arabia, Qatar, Oman and Kuwait — have been actively engaged in shooting

down Iranian one-way attack drones since the onset of the war with Iran. The RAF's own Ministry of Defence has confirmed that UK Typhoons and F-35s have conducted defensive missions over the Eastern Mediterranean, Jordan, Bahrain and the UAE.

Every one of those intercepts currently costs the RAF a missile worth hundreds of thousands of dollars. APKWS rockets, by comparison, cost between \$15,000 and \$20,000 for the guidance section, with rocket motors adding roughly \$1,000 to \$2,000. The economics are not subtle.

THE OTHER ARGUMENT FOR APKWS

Beyond unit cost, the rockets offer something equally valuable: volume. A standard APKWS pod holds seven rockets and fits on a pylon that would otherwise carry a single air-to-air missile. BAE's test imagery shows two pods — one under each wing — giving the Typhoon 14 rockets while still leaving room for six additional air-to-air missiles on other stations.

In a contested airspace where dozens of drones may be inbound simultaneously, the ability to engage more targets per sortie without returning to base matters enormously.

It is exactly the kind of attrition problem the Iranian drone campaign has exposed, and one that expensive precision missiles were never designed to solve.

Brief Note:

The APKWS was originally developed as an air-to-ground weapon — a cheap, precise alternative to full-sized guided bombs. Its air-to-air application, using a proximity fuze to detonate near drones, came later and was driven almost entirely by battlefield demand in the Middle East and Ukraine. What started as a cost-saving measure for ground attack has become the front-line answer to one of modern warfare's most pressing problems.

THE U.S. PROVED IT WORKS — NOW ALLIES WANT IN

The RAF's interest in APKWS is not happening in a vacuum. U.S. Air Force F-15E Strike Eagles, F-16C Vipers and A-10 Warthogs are already cleared to employ the weapon in the air-to-air role, and USMC F/A-18C/D Hornets are next. The results in the Middle East have been unambiguous.

LT GEN DEREK FRANCE, HEAD OF AFCENT — USAF

APKWS is our primary weapon against a drone. We have had multiple shoot-downs with it.

Ukraine's F-16s are also using APKWS in the air-to-air role against Russian long-range attack

drones. The weapon is rapidly becoming the standard cost-effective counter-drone tool across Western fighter inventories — and the Typhoon's trial puts it on track to join that list.

The question now is how broadly the capability spreads across the Eurofighter consortium. Germany, Italy and Spain — the other three partner nations — have not publicly confirmed their interest in adding APKWS to their Typhoons, though discussions are reportedly underway. Given the operational context all four nations are watching, the pressure to act is building.

The cost case — by the numbers

Weapon	Unit cost	Per intercept
AIM-120 AMRAAM (latest)	~\$1,000,000	1 missile
AIM-9X Sidewinder	~\$450,000	1 missile
IRIS-T / ASRAAM	~\$400,000+	1 missile
APKWS II guidance section	\$15,000–\$20,000	1 rocket

The table makes the argument plainly. At a time when defence budgets are stretched and drone threats are intensifying, the ability to engage an inbound Shahed with a \$17,000 rocket rather than a \$1 million missile is not just tactically sensible — it is strategically necessary. And with seven rockets per pod, a Typhoon can now engage seven drones for roughly the cost of one AMRAAM shot.

BAE Systems has said the Warton

trial is part of a broader range of capability enhancements planned for Typhoon. With air-to-air drone testing next on the schedule and Gulf operators already in the fight, the window between trial and operational deployment is likely to be short. The drone threat is not waiting for certification timelines.



ROKETSAN FIRES

ON ALL CYLINDERS

\$3 BILLION INVESTMENT

With gleaming new facilities, record investment and missiles rolling off the line, Ankara is reshaping its place in global defence — one homegrown weapon at a time



ROKETSAN

\$3B Total Investment Value	\$1B Completed Investment	92% Domestic Sourcing Rate	11+ Missile Systems Delivered
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Turkish President Recep Tayyip Erdoğan stood before a newly inaugurated production complex in Ankara and declared what many in the country's defence sector had long been working toward: Türkiye, he said, is now a nation fully capable of protecting its own skies, arming its own platforms and developing its own ammunition — with its own engineers.

The occasion was the opening of Roketsan's latest production facilities, the first phase of an investment the company's CEO Murat İkinci described as "the largest defence industry investments in the history of the Republic." The completed phase alone carries a price tag of \$1 billion; the full programme is valued at \$3 billion.

"Today, Türkiye is a country capable of protecting its own skies, equipping its own platforms and developing its own ammunition."

The new complex in Kirikkale includes a warhead facility, missile integration facilities and a fuel production plant —

infrastructure that Roketsan says will allow it to scale up serial production across its full product range. İkinci

signalled further announcements on expansion plans would follow soon.

BUILDING THE STEEL DOME — AIR DEFENCE FROM THE GROUND UP



At the core of Türkiye's ambition is the Steel Dome concept — a layered, nationally produced air defence architecture designed to shield Turkish airspace without reliance on foreign systems. Roketsan sits at the heart of that programme, supplying missiles for the Siper, Hisar and Sungur families that form the system's backbone.

İkinci confirmed that development of the Siper-2 air defence missile is progressing toward serial production. Designed by TÜBİTAK SAGE,

Türkiye's defence research arm, the Siper-2 is expected to be among the most capable missiles in the family. Roketsan will serve as an industrial production partner, continuing a model the company has refined across multiple programmes.

He added that existing systems would continue to gain new sensors and expanded capabilities, and that new variants would join the Siper family over time — keeping pace with the evolving threat environment Türkiye faces across its borders.

BRIEF NOTE

Roketsan now sources 92% of its components domestically — one of the highest self-sufficiency rates of any missile manufacturer in the world. When global supply chains fractured during recent years, the company barely flinched while competitors scrambled.

THE SUPPLY CHAIN EDGE 92% AND COUNTING

The global defence supply chain has been under sustained pressure — disrupted by pandemic aftershocks, geopolitical fragmentation and surging demand from conflicts across Europe and the Middle East. Roketsan's leadership used this week's 3rd

Strategic Partnership Summit to make a pointed argument: vertical integration is the only real hedge. "We are affected by disruptions in the global supply chain," İkinci acknowledged. "But because we operate with a domestic value-added ratio above 90%, we are less affected than some other stakeholders or competitors."

That figure — 92% domestic sourcing — has taken years to build. The company has invested heavily in alternative supply sources, local manufacturing partnerships and supplier development, with the goal

of creating a defence industrial base that can sustain production even if external inputs dry up entirely.

Haluk Görgün, head of Türkiye's Presidency of Defence Industries (SSB), reinforced the message at the same summit. Modern warfare, he argued, is no longer decided solely by what happens on the battlefield — it is shaped by the depth and resilience of the industrial ecosystem behind the front line.



Erdoğan's Words

'We will not allow Türkiye's security atmosphere to be undermined'

The opening ceremony carried weight beyond the industrial. Erdoğan opened his remarks by condemning a terrorist attack that had occurred earlier that day in Beşiktaş, Istanbul — an event, he said, that his government would not allow to destabilise the country's security environment. The juxtaposition was deliberate: a nation unveiling the machinery of its own defence while reaffirming its will to use it.

ON THE NEW ORDER OF WARFARE

"We are living in an era when the dominance on land, air and sea is intertwined, and when all the balances have been altered by autonomous technologies and the positioning in cyberspace. I take great pride in stating at this point that we are one of the founding actors of this new order in which the rules and processes have been restructured."

Erdoğan framed Türkiye's defence industrial rise not as a response to threat, but as a statement of sovereign identity. Over 23 years, he argued, Türkiye had gone from dependence on foreign suppliers to setting norms — producing platforms, systems and software that other nations now seek out.



ON DETERRENCE

"We will raise the deterrence of our heroic military to a much higher level with this new infrastructure, which has been built for our critical air defence systems, strategic missile projects and smart ammunition capabilities."



EYES ON EXPORT FROM SAUDI ARABIA TO INDONESIA

Roketsan's ambitions extend well beyond Türkiye's borders. The company has signed a joint production agreement with Saudi Arabian Military Industries to co-produce cruise and anti-tank guided missiles, and has inked a separate technology transfer deal with Indonesia for the Cakir cruise missile — giving Jakarta the tools to build the system domestically.

Görgün's framing of the defence industry as "a strategic field of power that directly reflects a nation's warfighting capacity, resilience and continuity" captures something that goes beyond Türkiye's domestic requirements. A country that can produce missiles at scale, sustain supply chains and transfer technology is a country that has something to sell — and something to offer as a partner in an increasingly fragmented world.



The defence industry has become a strategic field of power that directly reflects a nation's warfighting capacity, resilience and continuity. — Haluk Gorgeun, SSB

Space, too, is on the horizon. Analyst Kayaoglu's observation about the commercial potential of rocket technology beyond military applications reflects a calculation that Türkiye's defence planners appear to be making: that the infrastructure being built today for missiles is tomorrow's foundation for a national space programme.

What has taken shape in Ankara and Kırıkkale is more than a production complex. It is an argument — made in steel, propellant and precision engineering — that Türkiye intends to be counted among the world's serious defence powers. The question now is not whether Roketsan can build the missiles. It already has. The question is how far that capability will project in the years ahead.



FINLAND

DOUBLES DOWN 112 MORE K9 HOWITZERS

Helsinki's latest artillery deal with Seoul cements a defence partnership built for the long haul

Finland isn't tiptoeing around its defence ambitions. On 9 April 2026, the Finnish Ministry of Defence and South Korea's KOTRA signed a government-to-government contract worth €546.8 million for 112 surplus K9 self-propelled howitzers — complete with spare parts, tools, and test equipment. Deliveries are scheduled to begin in 2028.

This isn't Finland's first K9 rodeo. Helsinki first bought 96 of these systems in 2017, then expanded that order in 2022. With this latest batch, Finland's total K9 fleet surpasses 200 units — placing it firmly as the second-largest K9 operator in Europe, trailing only Poland.

The K9 is a 155mm/52-calibre armoured platform capable of striking targets beyond 40 km with strong cross-country mobility. For Finland — a country with dense forests, harsh winters, and a

1,340 km border with Russia — that combination of reach and ruggedness matters enormously.

The new systems will partially retire ageing towed artillery, and will be locally modified before entering Finnish Army service, with maintenance infrastructure already in place from earlier acquisitions.

Defence Minister Antti Häkkinen framed the deal as both a capability boost and a diplomatic signal. Finland's sustained investment in the K9 platform is part of a broader decade-long army modernisation drive and part of a deepening web of Nordic-Korean defence ties that now spans six NATO member states.

BY THE NUMBERS

112 Howitzers Ordered	€546.8M Contract Value
200+ Total K9s in Finland	>40 km Firing Range



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