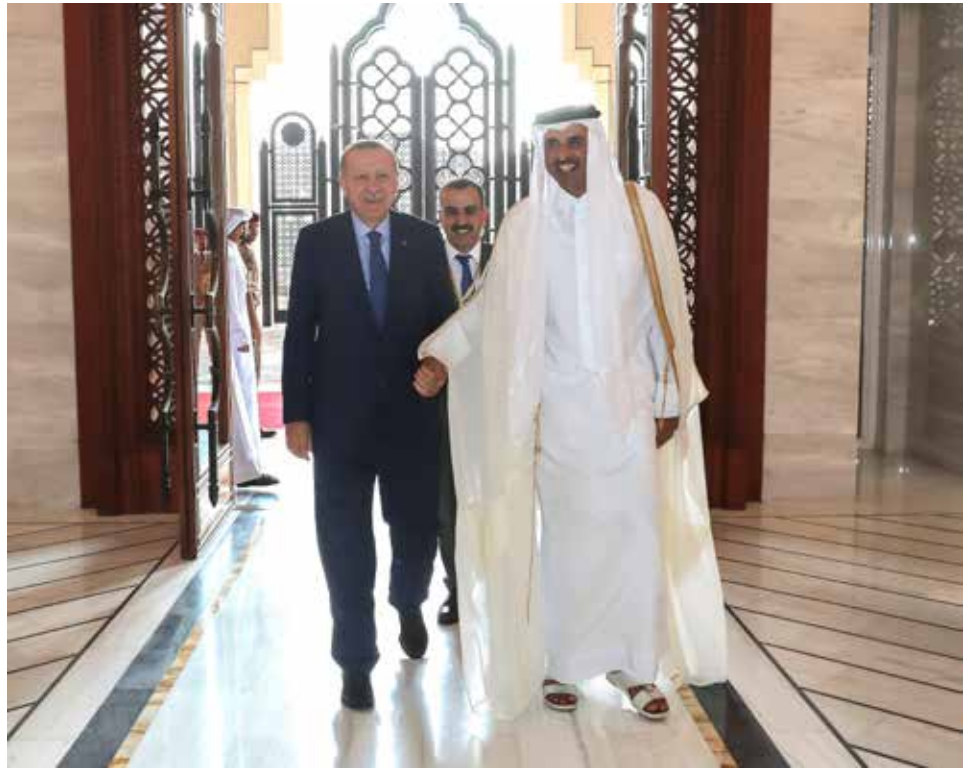


Turkey & Qatar Foul-Weather Friends!

by İbrahim SÜNNETCI

The Republic of Turkey has constantly sought out good relations with the Arab world and has paid great attention to not intervening in Arab affairs. However, this reservist attitude toward the Arab world started to change in the 1980s during which time Turkey had started to consider the Arab world as a lucrative market for Turkish made products and foreign capital under the then Prime Minister of Turgut ÖZAL's leadership. Turkey's relations with the Arab world gained significant momentum when the Justice and Development Party (AKP) came to power in Ankara in November 2002. The AKP has viewed the Arabs as natural allies. Believing that strong ties between Turkey and the Arab world could solve most of the problems in the region, Recep Tayyip ERDOĞAN, Turkey's President and the Chairman of the ruling Justice and Development Party, have made tremendous efforts during last 18 years to improve and expand both economic and political relations between Turkey and the Arab world.



During the first decade of the 2000s, as an active partner of the Arab states, Turkey developed economic, political and defense related relations with the Gulf Cooperation Council (GCC/an alliance of six Gulf monarchies; Saudi Arabia, Kuwait, Qatar, United Arab Emirates, Bahrain, and Oman that had signed a defense pact to consider an attack on one of them as an attack on all). Turkey's institutional relations with the GCC commenced with the "Framework Agreement for Economic Cooperation between Turkey and the Cooperation Council for the Arab States of the Gulf (GCC)" signed on May 30, 2005 in Manama, Bahrain. Thanks to the high level of economic and political relations on September 2, 2008 Turkey became a strategic partner of the

GCC with the signing of a Memorandum of Understanding (MoU) establishing a Strategic Dialogue Mechanism between Turkey and the GCC in Jeddah, Saudi Arabia. With this MoU Turkey became the first non-Gulf state able to attain the status of GCC's strategic partner. Trade volume between Turkey and the GCC have grown from US\$1.5 Billion in 1999 to US\$16 Billion in 2014. Turkish Government has previously declared a target of US\$100 Billion trade with GCC countries by 2023.

However, Turkey's relations with the GCC began to deteriorate rapidly soon after the July 2013 military coup in Egypt against Mohamed MORSI, the leader of the Muslim Brotherhood who had

been elected President of Egypt. While Saudi Arabia, and the UAE, asserted that the Muslim Brotherhood was a recruiting vehicle for Sunni terrorist groups in the region, Turkey and Qatar claimed that it was a moderate political Islamist movement that could foster regional stability through participation in the legitimate political process, so they provided region-wide support to the Muslim Brotherhood. Turkey also insisted that MORSI should be returned to power. So as a result of differences over the Muslim Brotherhood issue and the new military government of Egypt, Turkey's relations with the GCC was strained and tensions led to the creation of Saudi-Emirati and Turkish-Qatari blocks.

Due to political dispute

over the Muslim Brotherhood and other issues the differences between Saudis-Emiratis and Turkish-Qataris blocks widened and by accusing Qatar of supporting “terrorism”, Saudi Arabia, the UAE, and Bahrain withdrew their ambassadors from Doha in March 2014. In November 2014, the UAE, Bahrain, and Saudi Arabia made the decision to return their ambassadors to Doha, Qatar after an agreement was reached to resolve an 8 month-long dispute between the GCC states. In response to Saudi Arabia, Bahrain, the UAE and Egypt’s threats, Qatar chose Turkey as an ally and allowed the country to open a military base in its territories. On December 19, 2014, the two countries inked a military cooperation agreement that allows the deployment of the Turkish Armed Forces (TAF) in the State of Qatar. The agreement was ratified by the Turkish Parliament (TBMM) on March 19, 2015 and the first group of Turkish troops arrived in the capital city of Doha on October 4, 2015. As a result of these developments and diplomatic tensions Turkey’s economic ties with GCC countries have suffered a setback.

Impact of the Gulf Crisis and Turkey-Qatar Relations

Though the history of bilateral relations between the State of Qatar and the Republic of Turkey go back 1972, it is a fact that their relations have gained significant momentum after the Gulf Crisis, during

which time Turkey stood firmly with the State of Qatar.

The differences between Qatar and other member states of the GCC erupted again following the May 20-22, 2017, visit of US President Donald TRUMP to Saudi Arabia, during which he expressed substantial support for Saudi leaders. And on June 5, 2017 the Gulf Crisis broke out when a handful of Arab states led by Saudi Arabia (the de facto leader of the GCC) abruptly severed diplomatic relations with the State of Qatar, expelled Qatar’s diplomats, recalled their ambassadors, and imposed a blockade on the country, despite Qatar being a fellow member of the GCC. It is clear that the Gulf Crisis revealed the fragility of the GCC and created a negative impact on existing diplomatic, economic and military relations between Turkey and the GCC.

The Gulf Crisis also shed light on the emerging defense relations between Turkey and Qatar and proved to Qatar how valuable its relationship with Turkey was. Turkey helped its ally to cope with the Saudi-led blockade and prevented a military escalation of the crisis, as both Riyadh and the UAE reportedly had plans to invade Qatar. On June 22, 2017, the Saudi-led group presented Qatar with 13 demands, including severing relations with the Muslim Brotherhood, scaling back relations with Iran, closure of Turkey’s permanent military base in Qatar, termination of military cooperation with

Turkey inside Qatar, and paying reparations for its actions.

However, the State of Qatar refused to meet these demands and agreed with Turkey to increase the size of the Turkish military contingent in the country and to expand the Qatar-Turkey Combined Joint Force Command in Doha with naval and aerial components. On June 7, 2017 the Turkish Parliament (TBMM) ratified two deals on deploying troops in Qatar and training its gendarmerie forces. As part of the expansion plan construction of a new base near the Tariq Bin Ziyad military barracks was launched and completed in August 2019. Turkey also increased food exports to Qatar to replace those previously provided by Saudi Arabia. Qatar, as a small peninsular Gulf state, has struggled to maintain food supplies because of the imposed embargo on the country. According to reports soon after the imposition of the blockade, Turkey dispatched airlift (on June 22, 2017 the then Economy Minister Nihat ZEYBEKÇİ disclosed that 105 cargo planes from Turkey carried aid to Qatar) and naval expeditions and supplied Doha with approximately thousands of tons of food supplies. The sea route had been opened because air transport was insufficient to meet the needs of the population of the State of Qatar.

Turkey-Qatar Economic and Trade Relations

Economic relations

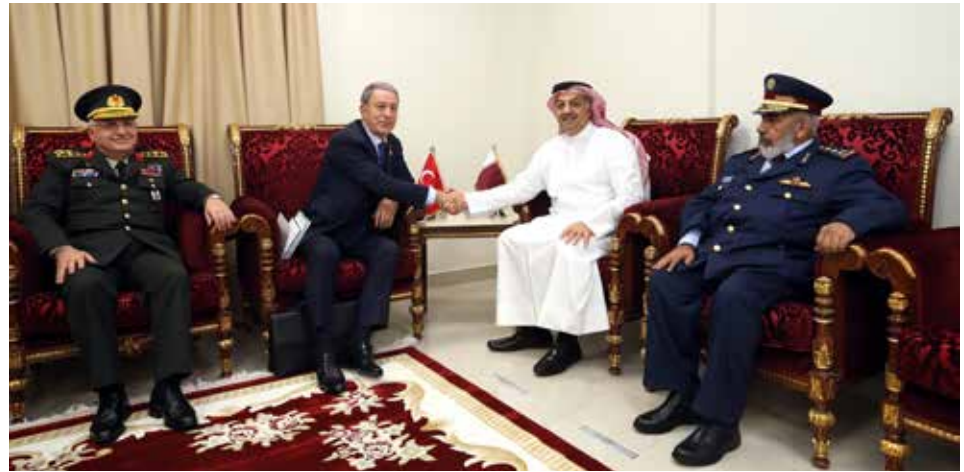
between Turkey and Qatar witnessed substantial development in the 21st century. In line with Turkey’s deepening relations with Qatar, Turkey has become an important destination for Qatari tourists. The volume of Qatari capital investments in Turkey increasing steadily during last two decades. In the 2000s, the total trade volume between the two countries was just US\$38 Million. By 2014, this figure had increased to US\$739 Million and by the end of 2018, trade volume between the two countries increased by 57%, compared to 2017, and reached a level of US\$1.4 Billion. According to Qatar Minister of Commerce and Industry Ali Bin Ahmed Al-KUWARI, the level of trade exchange between the two countries, which doubled by 78.8% to reach about QR 8.7 Billion in 2018, compared to QR 4.8 Billion in 2017, while Qatari exports to Turkey recorded growth of about 99% between 2017 and 2018, and Qatari imports from Turkey grew by about 64.9% during the same period. Qatar ranks first among the Gulf countries in terms of the number of projects undertaken by Turkish contractors.

Speaking to media in January 2020 Deputy Minister of Foreign Affairs of Turkey, Yavuz Selim KIRAN disclosed that standing at US\$6.4 Billion Qatar’s foreign direct investment in Turkey between 2005 and 2019 represents the 1.2% of Turkey’s cumulative foreign direct investment. Deputy Minister KIRAN also stressed that as of 2019

there were 170 companies with Qatar capital operating in Turkey. "Qatar is the 7th country where Turkish Contracting Industry companies undertake the most projects abroad. The total value of projects undertaken by Turkish companies in Qatar has reached US\$18.3 Billion (many of them related to the 2022 FIFA World Cup soccer tournament). With the project price of US\$1.2 Billion received in 2019, Qatar became the 2nd country with the highest number of jobs after Russia, with a share of 6.6%. Qatar expects to see many more Turkish companies setting up production facilities in Doha.

Speaking at the Qatari-Turkish Economic Forum held in November 2019 in Ankara, Qatar Minister of Commerce and Industry Al-KUWARI underlined that Turkish companies operating in Qatar play an important role in supporting the national economy, where more than 499 Qatari-Turkish joint ventures operate in the fields of trade, contracting and information technology, while the number of companies wholly owned by the Turkish side is 37, which are leading companies working in the fields of construction, and industry.

The volume of exports from Turkey to the State of Qatar has also been increasing steadily since 2002. According to Turkish Exporters' Assembly (TIM) figures, in 2019 Turkish exports to the State of Qatar rose to US\$1.101 Billion from US\$1.018,265 Billion (representing an



8.11% increase) in 2018. The volume of Turkey's exports to Qatar was US\$15 Million in 2002.

Military Cooperation Between Qatar & Turkey

The State of Qatar and Turkey currently maintain strong military ties. Several military cooperation agreements have been signed between the two countries during last decade, and Turkey steadily increase its military equipment exports to the State of Qatar. Turkey's military involvement in Doha dates back to December 2014, when Head of the State of Qatar Tamim Bin Hamad Al-THANI paid an official visit to Turkey. During the visit on December 19, 2014 the two countries signed a comprehensive military cooperation agreement that allows for the deployment of the Turkish Armed Forces (TAF) in the State of Qatar and agreed to set up a bilateral cooperation and consultation group called the Turkey-Qatar High Strategic Committee, headed by the Qatari emir and Turkish President.

Since then the Committee has convened five times – in December 2015, December 2016, November 2017, November 2018, and November 2019 sometimes in Qatar and sometimes in Turkey – to sign framework agreements and memorandums of understanding in different spheres, including the military sphere, with the aim of deepening the collaboration and strengthening the ties between the countries. At the fourth meeting of the High Strategic Committee, held in Istanbul on November 26, 2018 and attended by the Turkish president and Qatari emir, the two countries signed, inter alia, memorandums of understanding on cooperation in the cyber field and the exchange of military delegations, alongside agreements on culture, economy, and trade. The Committee's fifth meeting was held in Doha on November 25, 2019 under the co-chairmanship of the Amir Sheikh Tamim Bin Hamad Al-THANI and Turkish President Recep Tayyip ERDOĞAN and witnessed the signature of 7 agreements in various fields including economy, urbanization, trade,

industry, technology, and standardization to boost bilateral relations.

Under an agreement signed on December 19, 2014 Turkey set up its first permanent military base at Tariq Bin Ziyad military barracks. The establishment of Turkey's first permanent military base, which was named the Qatar-Turkey Combined Joint Force Command in December 2017, in Doha at Tariq Bin Ziyad military barracks, was completed in April 2016. Construction of Turkey's second permanent base near the Tariq Bin Ziyad military barracks was completed in August 2019. The Qatar-Turkey Combined Joint Force Command's new Headquarters was officially opened with a ceremony held on December 14, 2019 with the participation of Turkish Minister of National Defense (MoND) Hulusi AKAR, Chief of Turkish General Staff (TGS) General Yaşar GÜLER and Qatar Deputy Prime Minister and Minister of State for Defense Affairs Dr. Khalid Bin Mohamed Al-ATTIYAH. The new base was named after Khalid Bin Walid. The inauguration of the second Turkish permanent military base in Qatar further



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fortified the bilateral military and defense cooperation between the two nations. The new military base in Doha also reflects Turkey's increasing involvement in the security of the State of Qatar and the Gulf region in general. However, Turkey's increasing military presence in the region has created considerable discomfort among Qatar's neighbors.

Since the eruption of Gulf Crisis in June 2017, cooperation between the Turkish and Qatari militaries has notably intensified through a number of high-level visits, joint training and war games. On June 19, 2017 Turkey-Qatar joint military exercise was carried out at the Tariq Bin Ziyad military barracks. On July 31, 2017, Turkish Gabya Class frigate TCG Gökova, carrying 214 sailors, arrived in Hamad Port for two days of naval exercises with the Qatari Navy. Conducted during August 1-8, 2017 as part of military cooperation agreements between Turkey and Qatar the joint naval exercise, codenamed "Iron Shield" included combat maritime maneuvers. In March 2018, Turkish forces participated in the Qatari Army's "Lion's Den Exercise"; in April 2018 forces from both countries participated the "Sahin 20" joint military exercise in the Gulf; in December 2018 they held the "Al-Khandaq" joint exercise in Turkey, and in February 2019 the Qatari forces participated in the Winter-2019 Exercise, an annual exercise held in the city of Kars in northeastern Turkey. In late April 2019 Qatar's Border Guard held a joint exercise with the Turkish forces in Qatar. Furthermore, in the same

month the Turkish Air Force (TurAF) participated in the "FALCON-21 Exercise" with the Qatari Air Force. In June 2019, the Qatari Air Force participated in the 15-day Anatolian Eagle Exercise in Turkey. On March 8, 2020 the Turkish Ministry of National Defense announced that the Qatar-Turkey Joint Military Exercise "Invincible Sentry 2020 (Al-Hares Al-Mane 2020)" hosted by Qatar has been kicked off with the participation of Turkish troops. According to a MoND announcement Turkey participates in the Exercise with two Commando Teams from the Qatar-Turkey Combined Joint Force Command, one Special Forces Team from Turkish Special Forces Command and one SAT (Underwater Offence) Team personnel from Turkish Naval Forces Command. Turkish troops also participate in the "Impregnable Guard 2020" military drill, which is organized by the Qatari Joint Special Forces in partnership with the Ministry of Interior, the Internal Security Force (Lekhwiya), and the Amiri Guard. The "Impregnable Guard 2020" exercise commenced on March 8th and run through March 27, 2020 along with Jordan, Morocco, Pakistan, the Sultanate of Oman and the US. The drill aims to prepare and train the participants to respond to any cross-border security threat.

In order to strengthen the existing cooperation and collaboration between the two-Armed Forces, frequent meetings took place over the years between the Defense Ministers and

the Chiefs-of-Staff of the two countries since beginning of the Gulf Crisis. For instance, on November 4, 2017, Qatar Defense Minister Khalid Al-ATTIYAH met with his Turkish counterpart at the time, Nurettin CANIKLI, to discuss strengthening of military and defense cooperation between the countries as well as the situation in the Gulf. On March 25, 2019 the Chief of Staff of Qatar Armed Forces Lieutenant General (Pilot) Ghanem Bin Shaheen Al-GHANIM met with the Chief of TGS General Yaşar GÜLER in Ankara, Turkey. During the meeting a number of issues of mutual interest were discussed, including means of enhancing and developing bilateral relations and cooperation in defense and military fields. General Al-GHANIM also met Turkish MoND Hulusi AKAR in the presence of General GÜLER and Qatari Ambassador to Turkey, Salem Bin Mubarak Al-SHAFI. During his stay in Ankara, Al-GHANIM also paid a visit to Commander of the Turkish Special Forces. In May 2019, Qatar Defense Minister Al-ATTIYAH met in Qatar with his Turkish counterpart Hulusi AKAR, and the two met again in August 2019, this time in Turkey. In September 2019 Qatari Defense Minister Al-ATTIYAH and the Chief of Staff of Qatar Armed Forces Lt. Gen. (Pilot) Al-GHANIM met with the Chief of TGS General Yaşar GÜLER to discuss the military relationship between Turkey and Qatar. On November 6, 2019 at the Turkish Ministry of Defense the Chief of Staff of Qatar Armed

Forces Lt. Gen. (Pilot) Al-GHANIM met separately with Turkish MoND AKAR and Chief of TGS General GÜLER. During the meetings, they discussed aspects of joint military co-operation between the two sides. On November 29, 2019 the Chief of Staff of Qatar Armed Forces Lt. Gen. Al-GHANIM met with the Commander of Turkish Special Forces, Major General Ömer Ertuğrul ERBAKAN, and his accompanying delegation in Doha, Qatar. The meeting discussed military topics of mutual interest. On December 13, 2019 accompanied by Chief of TGS General GÜLER, Turkish MoND AKAR visited Qatar. During the visit he met with the Libyan Government head to discuss the recent maritime deal between Turkey and Libya. He also attended the inauguration ceremony of the Qatar-Turkey Combined Joint Force Command's new Headquarters in Doha. On December 23, 2019 a Qatari Navy delegation paid a visit to Turkish Naval Forces Command's Yıldızlar Surface Training Center Command to get firsthand information on the Fire and Damage Control Training Simulator and the Bridge Combat Information Center Simulator Systems. On February 4, 2020 the Chief of Staff of Qatar Armed Forces Lt. Gen. Al-GHANIM met with Commander of the Turkish Naval Forces (TNFC) Admiral Adnan ÖZBAL in Doha, Qatar. During the meeting, they reviewed the military relations between the two countries and means of enhancing and developing



Chief of TGS General GÜLER and the Chief of Staff of Qatar Armed Forces Lieutenant General (Pilot) Al-GHANIM met at TGS Headquarters in Ankara on February 19, 2020

them. A number of senior officers of the Armed Forces also attended the meeting. On February 13, 2020 Commander of the Qatari Emiri Navy Major-General (Navy) Abdullah Bin Hassan Al-SULAITI received Commander of the TNFC Admiral Adnan ÖZBAL.

On February 19, 2020 the second Qatari-Turkish High-Level Military Dialogue Meeting concluded in Ankara. The delegation of the State of Qatar to the meeting was chaired by the Chief of Staff of Qatar Armed Forces Lt. Gen. Al-GHANIM, while the Turkish side was chaired by Chief of TGS General GÜLER according to reports the meeting discussed a number of issues related to the military cooperation between the two countries and ways of promoting and enhancing them. On the sidelines of the meeting, Lt. Gen. Al-GHANIM also met with Turkish MoND AKAR. During the meeting, the two sides are said to have reviewed a number of issues related to military cooperation between the two brotherly countries and means of developing them.

Turkish Defense & Aerospace Industry Export Figures

Starting in 2010 in an effort to increase defense cooperation with Islamic countries, Turkey turned its attention to the Middle East and North Africa (MENA) to export fast intervention boats, rockets/missiles, ammunition and armored vehicles. During recent years, leading Turkish companies such as Anadolu Shipyard, Aselsan, ARES Shipyard, Baykar Makina, BMC, FNSS, Havelsan, Meteksan Defense, Nurol Makina Sanayi (NMS), Otokar, Roketsan, TUSAS, TEI, Vestel Savunma and Yonca-Onuk JV have been quite active particularly in the Middle East and Gulf countries. Acting as partners not suppliers towards the Middle East and Gulf countries, Turkish defense sector companies have dramatically increased their exports and have started to sign high-value export contracts, thanks to the proactive foreign policy, aggressive marketing efforts and state-of-the-art, NATO-

standard compliant and cost-effective products.

Emerging as a new arms exporter that can provide more efficient, low cost, combat proven, and less problematic products for arms buyers, the Turkish Defense & Aerospace Industry has managed to put 5 firms (Aselsan [52nd], TUSAŞ [69th], STM [85th], BMC [85th] and Roketsan [89th]) on the list of the world's 100 largest defense companies in 2019. According to export figures revealed by the Defense and Aerospace Exporters' Association (SSI) and the Turkish Exporters' Assembly (TIM), the Turkish Defense and Aerospace Sector has increased exports by 34.6% during 2019 compared to 2018. According to figures Turkey has realized US\$2,741 Billion worth of defense and aerospace exports to 164 countries around the globe in 2019. According to data released by TIM, the total weight of products exported by the Turkish Defense & Aerospace Industry during January 1st - December 31st of 2019 was around 44,315 tons. The annual turnover of the Turkish Defense & Aerospace

Industry also rose to US\$9 Billion in 2019. The exports of Turkish Defense and Aerospace Industry are expected to exceed US\$3 Billion by the end of 2020.

According to data collected by the Stockholm International Peace Research Institute (SIPRI), during 2015-2019 with a share of 0.8% Turkey ranked 14th on the list of the 25 largest major arms exporters of the world. Turkey was the 25th largest exporter in 2011. Turkey notably increased its arms exports (specifically armored vehicles and naval vessels/boats) to the Middle East and Gulf countries, which are among the major markets for Turkish Defense & Aerospace Sector sales, during 2013 - 2019 and this trend is expected to last also in 2020. According to TIM's figures during January 1st - December 31st of 2019, the Turkish Defense & Aerospace Industry has exported around US\$710,145 Million (which was at around US\$311,187 Million in 2018 and US\$131,52 Million in 2017) worth of military equipment to the Middle East and Gulf countries. According to TIM's data as of December 31st, 2019 the list of the top 15 countries that imported defense and aerospace products from Turkey is composed of; the US (US\$816,623 Million), Oman (US\$ 297,199 Million), Germany (US\$256,868 Million), Qatar (US\$186,168 Million), UAE (US\$132,229 Million), Ukraine (US\$119,237 Million), Azerbaijan (US\$88,676 Million), the Netherlands (US\$75,125 Million), the

UK (US\$60,604 Million), Bahrain (US\$40,813 Million), India (US\$40,630 Million), Pakistan (US\$40,175 Million), Poland (US\$33,675 Million), France (US\$31,884 Million) and Italy (US\$24,720 Million).

According to TIM figures, the total arms exports carried out by the Turkish Defense & Aerospace Industry soared by 5% during the first two months of 2020 and reached US\$348,697 Million. With a total of US\$62,187 Million in purchases the Middle East countries took a 17.8% share in Turkey's arms exports during January 1 – February 29, 2020.

Exporting its defense products to 164 countries around the world Turkey is targeting to become a top six country in the world in terms of defense and aerospace exports. On December 4, 2019 the Presidency of Defense Industries (SSB), the procurement authority under the Turkish Presidency, issued the "Strategic Plan 2019-2023," document, which states that the Turkish Defense and Aerospace Sector's annual turnover will rise to US\$26,9 Billion in 2023, from US\$8,761 Billion in 2018. According to the "Strategic Plan 2019-2023," document Turkey plans to boost its defense and aerospace (both military and commercial) exports to US\$10.2 Billion by 2023, from US\$2,188 Billion in 2018 and by 2023, the local content rate in defense and aerospace projects will reach to 75% up from 65% in 2018, according to the plan.

Turkish Defense & Aerospace Industry Exports to Qatar

Apart from close political and personal ties between Qatari and Turkish leadership, the defense sector has been one of the key areas to bolster cooperation and partnership between these two brotherly countries. Despite a strong presence in Qatar by the US and France, Turkey also plays an active role in Qatar's private and defense sectors. Qatar is interested in diversifying its defense and security procurement and has appreciated Turkey's approach for joint production, research and development, and easy technology transfer. Qatar has started to sign large-scale contracts with Turkish suppliers for the procurement of state-of-the-art, NATO-standard compliant and cost-effective defense and aerospace equipment for the Qatar Armed Forces.

The first formal agreement between the Turkish MoND and the Qatar Ministry of Defense for the procurement of defense and aerospace equipment from Turkey was signed during the IDEF '11 Fair. The Memorandum of Understanding (MoU) formed in May 2011 covered the direct procurement of US\$120 Million worth of military equipment in the span of a year from Turkish companies. Under this agreement the Kale/Baykar partnership was awarded a contract in 2011 for the supply of 10

x Bayraktar GÖZCÜ Mini UAV Systems (each has 4 air vehicles) valued at US\$2,5 Million. The acceptance tests of GÖZCÜ Mini UAVs were completed in February 2012 in Qatar. These Mini UAVs, which are Turkey's first exported Unmanned Air Vehicles, were manufactured in accordance with Qatar's desert climate. Having an operational range of 15-25 km, the GÖZCÜ Mini UAV is capable of reaching a maximum of 12,000 feet. Within the scope of the MoU valued at US\$120 Million, Qatar also placed an order for 3 x MRTP 34 and 3 x MRTP 16 Fast Intervention Boats to Yonca-Onuk JV Shipyard (with a disclosed value of Euro52 Million) and for an AW139 Helicopter Simulator Training Center to Havelsan with a value of around US\$50 Million. Under the MoU Qatar also procured an undisclosed number of vehicle-based RF Jammer systems from Turkish firm Atel Telecommunication in 2012. As part of the MoU, a free SSB Office, acting as liaison offices, arranging contracts between local authorities and Turkish companies was allocated within the Qatari Emiri Navy Command's premises in Doha.

Turkey's arms sales to Qatar increased steadily during 2014 – 2019. According to export figures revealed by TIM and SSI, Qatar is also progressing on the list of the top 15 countries that import defense and aerospace products from Turkey. While it was the 8th largest importer/

recipient of the Turkish Defense and Aerospace industry products in 2014, Qatar ranked 4th both in 2018 and in 2019. According to data collected by TIM, Qatar imported US\$52,783 Million worth of military equipment from Turkey in 2014, US\$10,375 Million in 2015, US\$52,277 Million in 2016, US\$24,484 Million in 2017 (ranked 12th in the list), US\$83,455 Million (this represents a 240.85% increase compared to 2017) in 2018 and US\$186,168 Million (represents a 123.08% increase compared to 2018) in 2019. According to SSI data as of 2019, 15 Turkish Defense and Aerospace Sector companies have been exporting its products to Qatar. According to reports since the Gulf Crises, that erupted in June 2017, Qatar has spent more than US\$25 Billion on military procurements and according to TIM's data the total value of Turkish defense exports to Qatar realized during 2017-2019 merely amounted to US\$295 Million. Turkey aspires to have a bigger share in Qatar's defense and security procurements in the coming years.

Speaking at Aselsan Union of Forces Summit held on February 5, 2019 at ATO Congressium Center in Ankara, Turkey, Turkish MoND Hulusi AKAR, disclosed that Turkey has recently signed a contract with Qatar for the sale of FIRTINA Self Propelled Howitzers (SPHs). MoND AKAR did not share any figure about the number of FIRTINA



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The New Generation FIRTINA-II SPH was displayed at MoND's Booth at IDEF'19

SPHs to be delivered to Qatar Armed Forces. It is believed that the contract covers New Generation FIRTINA (also dubbed FIRTINA-II) SPHs, which are under production at 1st Main Maintenance Factory Directorate located in the Sakarya province of northwest Turkey. On December 14, 2018 Aselsan secured a contract valued at US\$194,6 Million to deliver Fire Control Systems for the 140 FIRTINA-II SPHs ordered for the Turkish Land Forces Command.

With a Presidential Decree (Decree No: 481) signed by President ERDOĞAN on December 10, 2018 and issued in the Official Gazette on December 21, 2018 as part of the ALTAY MBT Serial Production Project the 1st Main Maintenance Factory Directorate, Turkey's top Main Battle Tank maintenance and

modernization factory was transferred to BMC, a joint Turkish-Qatari venture that manufactures armored vehicles. The Qatari Government owns 49.9% of BMC. Under the deal, which represents another landmark in Turkish-Qatari defense cooperation, BMC will make an initial investment of US\$40 to US\$50 Million to modernize the MBT assembly and production unit. BMC plans to convert the military factory into a mass production unit for the ALTAY MBT, Turkey's first indigenous, new-generation MBT. The plant will be under lease to BMC for a period of 25 years, according to the deal. However, the Turkish Government's decision to privatize and lease of the 1st Main Maintenance Factory Directorate operated under the MoND-controlled General Directorate of Military

Factories (AFGM) to the private company BMC drew strong criticism in Turkish public opinion and in the end it was decided to transfer the 1st Main Maintenance Factory Directorate to ASFAT Inc. According to Turkish media the transfer procedure took place during the second half of 2019. It is stated that ASFAT, which undertook the transfer, either directly rented the factory to BMC or let BMC to run it within certain conditions, periods, and restrictions. Since its purchase by Turkish and Qatari (Barzan Holdings) partners for US\$360 Million following a tender held in an early 2014, BMC has been working as part of the strategic partnership between Turkey and Qatar.

In October 2018 it was reported that after receiving assurance that there would be no export restrictions, state-owned Machines and Chemical Industries Board (MKEK) signed a contract to procure 20 powerpacks (including 5TDFMA-1 engines) from UkrOboronProm (Ukrainian Government's Defense Industry Enterprise) for the FIRTINA-II SPHs. These 20 powerpacks were supposed to be installed in the Qatari Emiri Land Force's FIRTINA-II SPHs. However, according to recent reports Turkey find a new European engine provider for FIRTINA-II SPHs and series production would start soon during the first half of 2020.

Activities of Turkish Defense and Aerospace Industry Companies in Qatar

In order to strengthen the existing cooperation and collaboration in the defense industry between Turkey and the Middle East and Gulf countries MUSIAD (Independent Industrialists' Businessmen's Organization) and the SSB decided to organize country specific exhibitions in selected countries. In this context the Turkish Defense & Aerospace Sector's first event aimed at one specific country, High-Tech Port by MUSIAD Qatar, a high level, advanced and strategic technology exhibition, was organized during October 6-8th, 2015 in Doha under the auspices of Turkish President Recep Tayyip ERDOĞAN and the Head of State of Qatar Sheikh Tamim Bin Hamad Al-THANI. 67 Turkish and Qatari companies showcased their latest innovations in the defense industry at the High-Tech Port by MUSIAD Qatar.

In order to create awareness in the Middle East and Gulf countries of the Turkish Defense and Aerospace Industry capabilities, the Presidency for Defense Industries (SSB) has been supporting national participation in defense exhibitions in this region. In this context, Turkey participates in important defense and aerospace exhibitions organized

in the Middle East and Gulf region such as IDEX/ NAVDEX (UAE), DIMDEX (Qatar), SOFEX (Jordan) and Bahrain International Air Show (BIAS) and key players from the Turkish defense sector are brought together in a national pavilion.

Offering great export opportunities for the Turkish Defense and Aerospace Industry products, Turkey has been participating in the DIMDEX Exhibition, which has been held every two years since 2008, at a “National Level” with the support and coordination of the SSB since 2010. Turkey has been steadily expanding its participation and stand area at the Doha International Maritime Defense Exhibition and Conference (DIMDEX) reaching 33 companies occupying 2,413 square meters of the fairground in 2018. Turkey attended DIMDEX 2016 with 24 firms and 1,295 square meters of the fairground under the coordination of the SSB. At DIMDEX 2018, which was held during 12-14 March 2018, Turkey’s leading defense & aerospace companies won contracts worth US\$800 Million, of which around US\$500 Million went to Turkish private shipyards. Meanwhile in March 2018 it was revealed that Qatar signed an agreement with Turkey to build a training center for Qatar’s marine special forces. Under the contract awarded within the scope of DIMDEX 2018, Turkish firm MDS Defense Technologies and Construction Inc. would establish “BUROQ Special



Marine Operations” Training in the Zekreet Zone. The contract was signed by the Commander of the Joint Special Forces, Major General Hamad Bin Abdullah Al-Fetais AL-MARRI, MDS Chairman İlyas AYWACI and Board Member İzzet ÖZGÜMÜŞ. With new training center the training needs of 200 military personnel would be met seamlessly and completely. It was to be established on approximately 130 acres of land. The aim of the new Naval Special Forces Training Center is to train elite units such as SAS (Underwater Defense) and SAT (Underwater Offence). The new Naval Special Forces Training Center will house various buildings and equipment such as an administration building, a 50-meter indoor shooting range and simulation center, a multipurpose training center and a parachute training area, a training area for urbanized terrain, a bomb

training area, a cargo ship prepared for anti-terror and fire training, a pentathlon training area, a port for zodiac boats, a 200-person sleeping quarters for soldiers, a 50-person sleeping quarters for officers, a dining hall, and weapons and ammunition warehouses. Meanwhile during DIMDEX 2018, Piri Reis University, a maritime institution, also signed an agreement to establish an academy for the Qatari Emiri Navy.

The 7th edition of DIMDEX Exhibition was scheduled to be held during March 16-18, 2020 in Doha, however on March 3, the organizing committee announced that after consulting with public health officials and the Government of the State of Qatar regarding the status of the event, it was decided upon to cancel the event due to spreading corona virus. “Though the risk to the

general public in Qatar remains low, our primary concern remains the health and welfare of all residents and visitors to Qatar and for this reason the event will no longer be held,” as stated in the press release issued by the organizing committee.

Anadolu Shipyard

During DIMDEX 2018 the Qatari Emiri Navy placed an order for two Cadet Training Ships (CTS) to Turkish private shipbuilder Anadolu Shipyard. According to Anadolu Shipyard, the 90-meter vessels will displace 1,950 tons and will feature a helipad for a medium-size helicopter. The vessels, which will have the capacity to provide training for up to 72 naval cadets and are scheduled to be delivered in 36 months, are also set to be capable of performing offshore patrol duties.

Aselsan

Established in 1975 as a communication electronics company, Aselsan has grown into the largest defense electronics company in Turkey, one of the 100 largest defense companies (52nd in 2019) in the world. Aselsan already completed the delivery of three 12.7mm STAMP and three 30mm STOP/MUHAFIZ Remote Controlled Stabilized Naval Weapon Systems to the Qatari Emiri Navy and they were integrated on Yonca-Onuk JV's MRTPI6 and MRTP34 Class Fast Intervention Boats. Aselsan also delivered a further six 12.7mm STAMP Systems to Qatar and they were integrated on six MRTP20 boats ordered during DIMDEX 2016. During the DIMDEX 2018 Exhibition, Yonca-Onuk JV secured a contract from the Qatari Emiri Navy to deliver four MRTP24/U Special Operation Craft (SOCs) and four MRTP24/U Fast Missile Craft (FACs). Construction of the MRTP24/U SOC, which would be the Qatari version of the Turkish Navy's new SAT Boat design, started in 2019. The MRTP24/U SOC will be armed with one of Aselsan's 12.7mm STAMP Remote Controlled Stabilized Naval Weapon System. Whereas the MRTP24/U FACs will be fitted with a pair of STAMP Remote Controlled Stabilized Naval Weapon Systems as well as Aselsan's remotely controlled BORA Low Altitude/Short Range Naval Air Defense System to be armed with MBDA's Mistral missile. At the end of 2018, MBDA successfully demonstrated the use of the Mistral missile against



Aselsan's IGLA SAM Launcher System Mounted NMS YÖRÜK 4x4 was inw National Day Parade in Qatar, Doha

fast boats such as FIACs (Fast Inshore Attack Craft).

Aselsan's 12.7mm STAMP and 30mm STOP/MUHAFIZ Systems are also being integrated on a total of 26 HERCULES Fast Patrol Boats (11 x 24m ARES 80, 10 x 34,5m ARES 110 and 5 x 48,5m ARES 150) ordered in March 2014 and March 2018 by the Qatari Coasts and Borders Security Department from ARES Shipyard. An agreement regarding the procurement of 12.7mm STAMP and 30mm STOP/MUHAFIZ Remote Controlled Weapon Systems for the needs of the Qatar Coast Guard Command was signed between Aselsan and ARES Shipyard on December 28, 2016. Under the €20 Million contract awarded in January 2018 for the first batch of 17 boats covered the deliveries of 29 x 12.7mm STAMP and 12 x 30mm STOP/MUHAFIZ Remote Controlled Weapon Systems. Having established an office (Aselsan-Qatar Project Office) in Doha, Qatar Aselsan also exported

an undisclosed number of STAMP-2 and SARP RCWSs to Qatar and some of the SARP RCWSs were already integrated on Renault VAB 4x4 Wheeled Armored Vehicles in Qatar Armed Forces service. The Qatar Armed Forces also utilize the DargonEye Integrated Electro-Optic (EO) Sensor System of Aselsan. It incorporates basically: Thermal Imaging Sensor, Laser Range Finder, Color Day Camera, GPS and DMC. According to the Aselsan 2019 Activity Report, the company completed delivery of around 200 DragonEye EO Sensor Systems to Qatar and Turkish Armed Forces in 2019.

On June 8, 2018 Aselsan secured a contract valued around US\$150 Million from Nurol Makina to deliver an undisclosed number of SARP RCWSs (including SARP-Dual and SARP-ZAFER), SERDAR Anti-Tank Missile Launching Systems and IGLA SAM Launcher Systems to equip Qatar Emiri Special Forces' NMS/YORUK 4x4 Wheeled

Armored Vehicles (WAVs). Deliveries will take place in 2020.

Meanwhile under a contract awarded by the Qatar MoD on October 11, 2017 Aselsan completed the delivery of the Integrated Mobile Border Security System to the Qatar Armed Forces on March 12, 2018. The System includes a tactical vehicle based on Mercedes Benz fitted with the ACAR Land Surveillance Radar, ARYA E/O Sensor Systems, SECANS Security Management Software and İŞBİR's Tactical Silent Cabinet Generator system. Also at DIMDEX 2018, Aselsan signed a technology transfer deal with Qatari military technology firm Barzan Holdings (which owns 49% of BMC), covering the establishment of a joint venture 'BARQ' (Arabic for "lightning") in Qatar for the local production of Aselsan's stabilized remote weapon systems and electro-optical reconnaissance and surveillance systems for the Qatar Armed Forces.

ARES Shipyard

Following tough competition with 18 international shipyards ARES Shipyard secured a US\$55 Million contract on March 26, 2014, to deliver a total of 17 HERCULES Fast Patrol Boats from advanced composites in three configurations (five 24m ARES 80, 10 34.5m ARES 110 and two 48.5m ARES 150) to the Qatari Coasts and Borders Security Department. Deliveries started in October 2016 and ARES Shipyard managed to complete the delivery of the boats in late 2018 (20 months before the date specified in the contract). In December 2017, the handover ceremony for the ARES 150 HERCULES (QC901) Offshore Patrol Vessel, which is 48.5m meters in length and the ARES 110 HERCULES (QC812) Fast Patrol Boat (FPB), which is 34.5 meters in length, was held with the participation of officials from the Qatari Coasts and Borders Security Department and the Ministry of Interior in Antalya.

During DIMDEX 2018, ARES Shipyard received a follow-on contract to deliver three 48.5m ARES 150 Offshore Patrol Vessels and six 24m ARES 80 Special Operation Boats, to be armed with Aselsan's 12.7mm STAMP and 30mm STOP/MUHAFIZ Remote Controlled Stabilized Naval Weapon Systems. With this order while the total number of ARES Shipyard boats to enter the Qatari Coasts and Borders Security Department by the end of 2020 has been



increased to 26 and the total value of company's business volume in Qatar has reached US\$500 Million. ARES Shipyard also conducted negotiations with the Qatari Emiri Navy for the sale of two 27m long (+2 options) boats with an aluminum body. Within the scope of the contract, the boat personnel would be trained in Qatar, and the Qatari Emiri Navy will receive maintenance support for 6 years. ARES Shipyard also secured a contract from a Qatar state tourism company for the construction of 18 (8+10) ARES 17 CF luxury passenger ferries. The first two boats were delivered in April 2014 and deliveries of the first batch of 8 ferries were completed in January 2015.

Baykar Makina

As pointed out above Baykar Makina entered the Qatar market in March 2012 with the delivery of 10 x Bayraktar GÖZCÜ Mini UAV Systems (each has 4 air vehicles) that were ordered in 2011 under a US\$2.5 Million contract. During DIMDEX 2018, Baykar Makina secured a contract for the delivery of

three BAYRAKTAR TB2-S Armed UAV Systems with six aircraft, FLIR payloads, three Ground Control Stations and a UAV Training Simulator to the Qatari Emiri Air Force Reconnaissance and Surveillance Centre Command, within a one-year schedule. Having entered Qatar Emiri Air Force service during the first half of 2019, the BAYRAKTAR TB2-S Armed UAVs are armed with Roketsan's MAM-L and MAM-C smart munitions. Under the contract Baykar Makina also set up a UAV Operation Center and network-based data tracing and archiving software for the Qatari Emiri Air Force. Baykar Makina provided a 4-month long training activity in Edirne, Turkey to 55 Qatari Emiri Air Force personnel including UAV Pilot, Payload (probably CMX-15) Operator and Maintenance crew, who operate and fly BAYRAKTAR TB2-S Armed UAVs. The company also provides 2-year logistic support to the Qatari Emiri Air Force for the operation of BAYRAKTAR TB2-S Armed UAVs.

BMC

BMC, a Turkish-Qatari joint venture that manufactures armored vehicles, previously delivered 40 KIRPI MRAPS equipped with a Dodaam RCWS to Qatar. During Doha International Maritime Defense Exhibition and Conference (DIMDEX 2018), which was held at the Qatar National Convention Center in Qatar's capital Doha on March 12-14, 2018, BMC secured a new contract to deliver 50 KIRPI-II MRAPs and 35 AMAZON 4x4 Multipurpose WAVs to Qatar. Deliveries of the vehicles that were fitted with Aselsan's SARP RCWS were completed in 2018.

On March 12, 2019 Vice Chairman of the Justice and Development Party (AKP) Ali İhsan YAVUZ disclosed that in accordance with the agreement Qatar will buy up to 100 ALTAY MBTs from Turkey and 40 of them would be delivered to the Gulf country in the first phase. However, Defense Turkey spoke to a BMC official during the IDEF '19 Fair and the official disclosed that there was no formal contract for the purchase at that time.

Havelsan

In December 2012 Havelsan secured a contract valued around US\$49 Million for the establishment of an AW139 Helicopter Simulator Training Center in Qatar for the Qatari Emiri Air Force. Under the contract Havelsan designed, developed and delivered one AW139 Full Mission Simulator (FMS), one Flight and Navigation Procedures Trainer, one Cabin Crew Trainer Simulator, a Debriefing System and a Tactical Control Center for AW139 Helicopters. The all-weather AW139 FMS provides high-resolution satellite imagery of Qatar's 11,000km² land and medium-resolution imagery for the entire Gulf area (100,000km²). In addition to this AW139 Simulator Training Center (TCC), operated by Havelsan, also included were Computer Based Training Classes, Debriefing Rooms and Infrastructure Facilities. As part of the AW139 Simulator Training Center Project, which aimed to meet the training requirements of the Qatari Emiri Air Force AW139 Helicopter pilots, the first delivery took place in June 2015. The TCC was among the first product delivered to Qatar by Havelsan. It was followed by the Flight and Navigation Procedures Trainer and the Cabin Crew Trainer Simulator. Production and Factory Acceptance Tests (FAT) of the AW139 FMS had already been completed in 2015 but since the construction of the AW139 Simulator



The cockpit view of Havelsan's AW136 Full Flight Simulator

Training Center was not completed at that time it was decided upon to provide training service to the Qatari Emiri Air Force AW139 Helicopter pilots at Havelsan facilities with the AW139 FMS. Chief of Staff of Qatar Armed Forces Lt. Gen. Al-GHANIM paid a visit to Havelsan facilities in August 2016 and performed a flight in the AW139 FMS. During his visit Lt. Gen. Al-GHANIM also met and talked with Qatari Emir Air Force pilots and trainers who had received Simulator Orientation Training at Havelsan facilities. 50 pilots from the Qatari Emiri Air Force were trained at Havelsan facilities for a total of 600 flight hours. Havelsan shipped the 47-ton AW139 FMS (manufactured with a local content rate of 70%) to Qatar on December 22, 2016. The official inauguration ceremony for the AW139 Helicopter Simulator Training Center took place on November 5, 2017. The Site Acceptance Tests (SATs) of the AW139 Simulator Training Center were completed in mid-2018. According

to Havelsan, at least a thousand pilots can be trained with the AW139 Helicopter Simulator Training Center annually.

Considering Qatar as one of its strategic partners, Havelsan opened its first Middle East office in Doha, Qatar in August 2017. On August 21, 2017 Havelsan secured a contract from the Qatar MoD for the establishment of a Joint Warfare Training Center, which would serve all units of the Qatar Armed Forces and would be able to provide C4I services. In the Joint Warfare Training Center (JWTC), under development by Havelsan, wargame, Computer Assisted Exercise (CAX), planning and simulation-based procurement activities shall be carried out. The Joint Warfare and Training Center (JWTC) consists of the following software and systems: Havelsan ETE3 Software (H.ETE3), Havelsan Social Media Simulation Software (H.SMS), a Television Studio and Newspaper Printing Center, a Data Center, a Simulation Software

and Joint Operations Center. Computer assisted exercise and war-game systems serve to improve the capabilities of command staff and headquarters in a cost-effective manner. Systems and software that allow the commander, headquarters and leader personnel to imagine and decide on any situation they may encounter during a real operation, enable planning and execution of maneuver, fire support, air defense, command-control etc. processes in battlefield function areas under realistic conditions. The JWTC, a force multiplier at the strategic level for the Armed Forces, is planned to be completed and put into service within the year 2020.

In 2019 Havelsan established a new company in Qatar, named 'Havelsan Qatar'. In 2019 Havelsan signed a contract to establish a Data Center for the Qatar Armed Forces. The high-tech Qatar Data Center Project that includes end-to-end engineering,

procurement, installation and commissioning of the Qatar Armed Forces Data Center in Doha/Qatar, will strengthen the company's presence in Qatar. In June 2019 Havelsan also signed a cooperation agreement with Jaidah Group, one of the leading international companies of Qatar in the fields of energy, telecommunication, automotive and security, cyber security solutions. With the agreement signed in Doha, the Qatar-based Jaidah Group will benefit from Havelsan's experience in cyber security and will improve its cyber security capabilities by taking advantage of Havelsan's products and solutions. Within the scope of the agreement, Havelsan will establish a Cyber Security Center for the Jaidah Group in Qatar and will make its cyber security platform available to Jaidah Group. Under the agreement Havelsan will cooperate with Qatar universities for the localization of Havelsan's solutions. In line with the agreement Havelsan will transfer its technologies in the field of cyber security to Jaidah Group. Qatar has been a victim of cyber security breaches in the past and has thus worked to strengthen its cyberspace and relating data. In May of 2017, for example, Qatar News Agency suffered a major security breach. This breach published false articles and released private emails to the public and caused diplomatic tensions and an economic embargo between Qatar and other GCC countries.



Nurol Makina

In 2017 Nurol Makina (NMS) secured a contract from Qatar for the delivery of 342 EJDER YALÇIN 4x4 tactical wheeled armored vehicles (WAVs). Nurol Makina started its EJDER YALÇIN deliveries during the second half of 2017 and in December 2017, Qatar displayed for the first time its EJDER YALÇIN 4x4 WAVs at the Qatar National Day Parade in Doha. The displayed vehicle was fitted with Aselsan's SARP-Dual RCWs. At the National Day Parade in December 2017 Qatar also revealed the two prototypes of NMS 4x4 WAVs that were equipped with Aselsan's SERDAR Anti-Tank Missile Launching Systems and IGLA SAM Launcher Systems. During DIMDEX 2018, Nurol Makina signed a Memorandum of Understanding (MOU) regarding the purchase of 214 NMS 4x4 Wheeled Light Armored Vehicles with Barzan Holdings. The MoU was signed by Major General Hamad Bin Abdullah Al-FETAIS Al-MARRI, Commander of the Qatari Joint Special Forces; Dr. Anil KAREL, Deputy General Manager of Nurol Makina; and

Mohammed Jaber LABDA, Programs Director of Barzan Holdings, at a ceremony held on the second day of the Exhibition. The NMS 4x4 Wheeled Light Armored Vehicles of the Qatar Emiri Special Forces were fitted with Aselsan's SARP RCWs, SERDAR Anti-Tank Missile Launching Systems and IGLA SAM Launcher Systems. Nurol Makina started series production of NMS 4x4 WAVs in June 2018.

Roketsan

Roketsan delivered an unspecified amount of MAM-L and MAM-C smart micro munitions to Qatar for use on BAYRAKTAR TB2-S Armed UAVs.

Yonca-Onuk Shipyard

During the DIMDEX 2018 Exhibition, Yonca-Onuk secured a contract from the Qatari Emiri Navy to deliver four MRTP24/U Special Operation Craft (SOCs) and four MRTP24/U Fast Missile Craft (FACs). The construction of MRTP24/U SOC, which would be the Qatari version of Turkish Navy's new SAT Boat design, started in 2019. The MRTP24/U SOC are being

armed with one Aselsan's 12.7mm STAMP Remote Controlled Stabilized Naval Weapon System. Whereas the MRTP24/U FACs will be fitted with a pair of STAMP Remote Controlled Stabilized Naval Weapon Systems as well as Aselsan's remotely controlled BORA Low Altitude/Short Range Naval Air Defense System to be armed with MBDA's Mistral missile. At the end of 2018, MBDA successfully demonstrated the use of the Mistral missile against fast boats such as FIACs (Fast Inshore Attack Craft).

Yonca-Onuk JV Shipyard had previously delivered three MRTP16 Class, three MRTP34 Class (Qatar was the first customer for this class) and 4 MRTP20 Class Fast Intervention Boats (FIBs, ordered in 2015 under a US\$44 Million contract) to the Qatar Emiri Naval Forces. Meanwhile construction and delivery phase for the additional six MRTP20 FIBs that were ordered during DIMDEX 2016 under a €41 Million contract was completed in 2019. The boats were armed with Aselsan's 12.7mm STAMP and 30mm STOP/MUHAFIZ Remote Controlled Stabilized Naval Weapon Systems ■