

MODERNIZATION OF GULF COUNTRIES: INVESTMENTS IN DEFENSE SYSTEMS AND STRATEGIC PARTNERSHIPS

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The Gulf region has emerged as one of the fastest-growing areas in terms of global defense expenditures. Countries in the region are developing military and strategic partnerships with various states in order to protect their energy resources, achieve leadership in regional competition, maintain regime security, and strengthen their national defense capacities. This study aims to examine the military modernization programs pursued by Saudi Arabia, The United Arab Emirates and Qatar countries that are rich in energy resources and economically strong in their efforts to enhance their defense capabilities. Within this framework, the study analyzes with which actors these countries have concluded arms procurement agreements and examines the main characteristics of the defense systems in which they have invested. The primary research question of the study is formulated as follows: *Within the context of modernization-driven military partnerships of Saudi Arabia, The United Arab Emirates and Qatar, which defense systems and weapons have been procured and what are the technical specifications of these military assets?* One of the sub-questions addressed in the study concerns why, despite their high-cost defense investments, the air defense systems of Gulf countries failed to provide effective deterrence against Iran's increasing missile attacks during the war that began on February 28 2026 between The United States-Israel and Iran. In this context, the study aims to answer the research question by examining the investments of Gulf countries in defense systems and their arms procurement agreements.

The Increase in Defense Expenditures and Modernization in The Gulf Countries

In recent years, various developments that have profoundly affected the security structure of the Gulf region have come to the forefront. The military confrontations that began on February 28 2026 between The United States/Israel and Iran triggered a large-scale security crisis as Iran's Islamic Revolutionary Guard Corps carried out extensive strikes against oil facilities, ports and U.S. military bases located in Gulf countries. Among the consequences of this conflict are the diversification of security threats, intensifying power competition among regional actors, disruptions in the supply processes of energy resources, and the deployment of military assets in

strategically significant areas. Furthermore, the increasing military tensions in the region and the uncertain security environment created by Iran's retaliatory attacks against U.S. bases in regional countries have directly influenced the defense policies of Gulf states.¹ These developments have led regional actors to pursue various forms of cooperation aimed at strengthening their security capacities and to increase their investments in advanced defense systems. In response to increasing security threats, Gulf countries seeking to strengthen their national security and rapidly adapt to the process of modernizing their military equipment have exhibited a growing tendency toward armament. According to data published in 2025 by SIPRI (The Stockholm International

¹ ORSAM (Ortadoğu Araştırmaları Merkezi), (2025). "Körfez'de Bölgesel Askerî Gerginlikler ve Ekonomik Çeşitlendirmede İstikrar Arayışı",

<https://orsam.org.tr/yayinlar/korfezde-bolgesel-askeri-gerginlikler-ve-ekonomik-cesitlendirmede-istikrar-arayisi>, (Accessed : 14 Mart 2026).

Peace Research Institute), The United States was Qatar's primary supplier in arms imports during the 2020-2024 period, accounting for 48 percent of total imports. In particular, exports of unmanned aerial vehicles and modern missile systems to Qatar have increased significantly.² Other extra-regional suppliers for Qatar include The United Kingdom, with a 15 percent share and France with 14 percent, from these countries, Qatar has procured fighter aircraft. Within the framework of its Vision 2030 initiative, Saudi Arabia increased its arms imports between 2020 and 2024 in order to diversify its military equipment, particularly focusing on modern and unmanned operational systems. In this context, The United States maintained a leading position with a 72 percent share in Saudi arms imports, while other major suppliers included Italy with 10 percent and France with 6 percent. For the United Arab Emirates, The United States ranked first among its major extra-regional partners in the 2020-2024 period, accounting for 64 percent of arms imports, while a notable increase was observed in the procurement of unmanned combat aerial vehicles from France, which held a 4 percent share.³ During this period, Gulf countries further developed their strategic cooperation and expanding arms procurement relations with The United States, one of the key external actors in the region.⁴

Arms Agreements Developed by Gulf Countries with The United States

According to data published by SIPRI in 2026, a significant increase was observed in the volume of arms trade directed toward The Gulf region during the 2021-2025 period. In this context, The United States ranked first with a 42 percent share in military equipment exports to Gulf countries.⁵ Saudi Arabia, which is the most resource-rich country in the region in terms of energy reserves, accounted for 12 percent of total global military equipment imports.⁶ Among The United States' other major arms trade partners in the region, Qatar ranked among the top five importing countries, while The United Arab Emirates was placed eleventh with an approximate share of 2 percent. An examination of SIPRI data indicates that The United States has increased its influence in the region by expanding the shipment of advanced military equipment through its defense agreements with regional countries. While this trend has contributed to the modernization of the Gulf countries' defense capabilities, it has also deepened their mutual dependence on The United States, which is considered a significant security concern.

According to a decision approved by The U.S. Department of State in 2024, a high-value arms agreement was concluded between The United States and Saudi Arabia through the Defense Security

² SIPRI, (2025). "Recent trends in international arms transfers in the Middle East and North Africa". <https://www.sipri.org/commentary/topical-background/2025/recent-trends-international-arms-transfers-middle-east-and-north-africa>, (Accessed: 21 Mart 2026).

³ Tartir- Morsy, 2023: s.5.

⁴ Erboğa, 2023: s.11.

⁵ SIPRI, (2026). "Global arms flows jump nearly 10 per cent as European demand soars".

<https://www.sipri.org/media/press-release/2026/global-arms-flows-jump-nearly-10-cent-european-demand-soars>, (Accessed: 21 Mart 2026).

⁶ The National News, (2026). " US tops global arms supply with Saudi Arabia the main recipient, Sipri data finds.", <https://www.thenationalnews.com/business/2026/03/08/us-tops-global-arms-supply-with-saudi-arabia-the-main-recipient-sipri-data-finds> , (Accessed: 21 Mart 2026).

Cooperation Agency (DSCA). It was stated that the primary objective of this sale was to enhance Saudi Arabia's defense capacity in the field of border security. Within the scope of the agreement, a military sale valued at approximately \$440 million was carried out, including TOW 2A BGM-71E-4B-RF missiles part of the TOW weapons system equipped with guided radio-frequency technology, precision targeting capabilities, and warheads, and capable of being deployed in multiple operational roles.⁷

In a decision approved by The U.S. Department of State in 2025, a high-budget arms sale agreement between the Defense Security Cooperation Agency and the Government of Qatar entered into force. It was stated that the purpose of this agreement was to enhance Qatar's deterrence-based defense and security capabilities against regional threats. Within the scope of the agreement, military equipment valued at approximately \$1.96 billion was sold to Qatar, including MQ-9B unmanned aerial vehicles, the Joint Direct Attack Munition (JDAM) guided air-to-ground munition system integrated into fighter aircraft, BLU-111 multi-purpose bombs used in bombardment operations, and AGM-114R2 Hellfire II missiles, which stand out for their laser-guided precision strike capability and can be launched from unmanned aerial vehicles.⁸

Furthermore, under a decision approved by The U.S. Department of State in 2025, a sales agreement concerning F-16 fighter

aircraft was concluded between The Defense Security Cooperation Agency and The Government of The United Arab Emirates. It was stated that the purpose of this sale was to strengthen the defense partnership between The United States and The United Arab Emirates. Within the framework of the agreement, a deal worth approximately \$130 million was finalized, including the sale of F-16 fighter aircraft and related equipment.⁹ An examination of these agreements indicates that various forms of cooperation have been established between The United States and key actors in The Gulf region, encompassing high-cost military equipment with advanced technological capabilities. In this context, it can be concluded that The United States constitutes one of the most significant strategic partners in the military equipment imports of Gulf countries.

Military Equipment Trade Developed by Gulf Countries with European States

Gulf countries engage in substantial military equipment trade with The United States and European states in order to establish effective defense capacities against increasingly diverse and complex security threats at the regional level. In this context, there has been a significant rise in the export of modern military equipment from European states to the Gulf region, including unmanned aerial vehicles, fighter aircraft, tanks, and ballistic missiles.¹⁰ One of the primary objectives behind the increase in arms trade from Europe to the

⁷ Defense Security Cooperation Agency, (2024). Kingdom of Saudi Arabia – TOW 2A & TOW 2B Missiles, Transmittal No. 24-11.

⁸ Defense Security Cooperation Agency, (2025). Qatar – MQ-9B Remotely Piloted Aircraft. Transmittal No. 25-16.

⁹ Defense Security Cooperation Agency, (2025). United Arab Emirates – F-16 Sustainment. Transmittal No. 25-25.

¹⁰ Arab Gulf States Institute, (2021). "More Arms, Less Influence? Europe-Gulf Relations Amid Regional Militarization". <https://agsi.org/analysis/more-arms-less-influence-europe-gulf-relations-amid-regional-militarization/>, (Accessed: 21 Mart 2026).

Gulf region is to ensure the security of energy supply originating from the Gulf. At the same time, Europe aims to enhance its influence in the region through defense cooperation with Gulf countries in line with its national interests. In this regard, increasing military equipment imports from Europe has become a strategic priority for Gulf countries, as they seek to reduce their growing dependence on defense cooperation with The United States.¹¹

The United Arab Emirates, in particular, has engaged in cooperation primarily with European defense companies aimed at enhancing the capabilities of its naval forces. This approach is directly linked to the country's objective of ensuring regional maritime security and increasing its control over key maritime trade routes. In 2024, a major agreement valued at approximately \$970 million was concluded between EDGE Group, the national defense company representing The Abu Dhabi administration and Fincantieri, an Italy-based naval equipment manufacturer, involving the production of modern warships.¹² This cooperation is regarded as an indication of The United Arab Emirates' objective to modernize the inventory of its naval forces. In 2025, EDGE signed another significant agreement with the French maritime company CMN Naval, worth approximately \$1 billion, covering amphibious assault vessels, various naval platforms, and related naval equipment.¹³ This development stands out as an important

step toward strengthening The UAE's capabilities in amphibious operations. In 2026, EDGE also approved a joint cooperation agreement with Safran Defense, a France-based manufacturer of advanced defense and smart weapon systems, encompassing long-range missiles and modern weapons technologies.¹⁴ These various agreements and the multifaceted partnerships developed by The United Arab Emirates with European defense companies are considered part of its broader security strategy aimed at enhancing its military capacity through next-generation technological systems.

The Saudi Arabian administration, seeking to reduce its dependence on The United States as its primary defense procurement partner, has been developing comprehensive cooperation with European-based defense companies. In line with this strategy, Riyadh aims both to diversify its network of international partnerships and to increase its influence in the global defense market. It is observed that air defense systems occupy a central priority in Saudi Arabia's defense expenditures. Saudi Arabian Military Industries (SAMI), in an effort to strengthen its position in the global market, engages in various collaborations with European companies at international defense exhibitions. Among these partnerships, agreements with the French aerospace and defense company Safran and the European aerospace corporation Airbus, particularly in the field of air

¹¹ SIPRI, 2026: s.11.

¹² EDGE, (2024). "EDGE Group and Fincantieri Formalise Shipbuilding Joint Venture, MAESTRAL, and Announce 400 Million Euro Order for 10 Naval Vessels". <https://edgegroup.ae/news/edge-group-and-fincantieri-formalise-shipbuilding-joint-venture-maestral-and-announce-400> , (Accessed: 21 Mart 2026).

¹³ EDGE, (2025). "EDGE to Continue Expansion of its Naval Capabilities through Multi-Billion Euro Joint

Venture with CMN NAVAL"

<https://edgegroup.ae/news/edge-continue-expansion-its-naval-capabilities-through-multi-billion-euro-joint-venture-cmn> , (Accessed: 21 Mart 2026).

¹⁴ Safran, (2026). " EDGE Group and Safran Join Forces to Disrupt the Smart Weapons Market" <https://www.safran-group.com/pressroom/edge-group-and-safran-join-forces-disrupt-smart-weapons-market-2026-02-23> , (Accessed: 21 Mart 2026).

platforms and equipment procurement, stand out. These developments contribute to the deepening of strategic partnership relations between France and Saudi Arabia. The signing of a high-value agreement worth approximately \$2 billion between Airbus and the Riyadh administration in 2025 is considered a significant indicator of the growing defense cooperation between the two parties.¹⁵ Furthermore, at The World Defense Show held in Riyadh in February 2026, Airbus announced the initiation of new agreements, alongside its decision to make substantial investments aimed at enhancing Saudi Arabia's capabilities in the air domain and strengthening bilateral cooperation.¹⁶ In addition, SAMI concluded a major military cooperation agreement in 2025 with Navantia, a Spanish naval defense company. Within the scope of this collaboration, Saudi Arabia signed a comprehensive procurement agreement with Navantia to modernize its naval inventory, including Avante 2200-class warships, unmanned underwater vehicles, and advanced electronic systems.¹⁷ In 2024, SAMI concluded a sale of short- and medium-range missiles with the Europe-based missile manufacturer MBDA aimed at strengthening Saudi Arabia's strike capabilities.¹⁸ At The World Defense Show held in 2026, MBDA introduced its next-generation missile systems to the Riyadh administration, signaling its intention to participate in high-value defense

agreements.¹⁹ In this context, Saudi Arabia allocates substantial revenues from its oil exports to modernizing its defense infrastructure through various collaborations with European defense companies. This approach lays the groundwork for achieving its long-term objective of maintaining military superiority in The Gulf region.

Qatar has adopted the strategic goal of restructuring its local defense infrastructure to accommodate next-generation military technologies. Accordingly, it has become an important procurement partner for Europe-based defense companies. Barzan Holdings, Qatar's primary defense-focused investment entity, develops extensive partnerships at international defense exhibitions to acquire modern unmanned military technologies produced by European firms. In this framework, a strategic partnership was established in 2020 between Barzan Holdings and Aerolis, a United Kingdom-based manufacturer of next-generation aerial platforms. Within the scope of this cooperation, Barzan made significant investments in unmanned aerial vehicles, fighter aircraft, and other advanced air platforms developed by Aerolis. In 2026, Barzan and Aerolis signed various agreements totaling approximately \$902.96 million, including the integration of next-generation defense platforms into the inventory of the Qatar Armed Forces.²⁰

¹⁵ Arab News, (2025). " Saudi Arabia, France discuss \$2.6bn aviation sector investment potential amid flurry of deals ".

<https://www.arabnews.com/node/2604903/amp> , (Accessed: 22 Mart 2026).

¹⁶ Saudia Press Agency, (2026). " Industrial Center, Airbus Sign Memorandum on Localizing Aviation Industry in Saudi Arabia". <https://www.spa.gov.sa/en/N2507630> , (Accessed: 22 Mart 2026).

¹⁷ Defense Arabia, (2024). " Saudi Arabia Expands Naval Fleet with Navantia Contract". <https://english.defensearabia.com/saudi-arabia-signs->

[contract-for-advanced-naval-vessels/#.](#) (Accessed: 22 Mart 2026).

¹⁸ Defense Arabia, (2024). "MBDA supporting Vision 2030 at WDS 2024". <https://english.defensearabia.com/mbda-supporting-vision-2030-at-wds-2024/> , (Accessed: 22 Mart 2026).

¹⁹ Defensehere, (2026). " MBDA supports Saudi Vision 2030 at WDS 2024". <https://defensehere.com/en/mbda-supports-saudi-vision-2030-at-wds-2024>, (Erişim Tarihi: 22 Mart 2026).

²⁰ Breaking Defense, (2026). " Barzan exec talks new business plan, unveils agreements and new platforms".

These agreements are regarded as the development of a long-term strategic partnership aimed at enhancing Qatar's defense capabilities. In 2026, The State of Qatar procured the GM200 MM/A and GM400a systems from the Ground Master radar series, developed by the French defense company Thales Group, to enhance its airspace attack detection capabilities.²¹ These radar systems are expected to provide the Qatar Air Force with a significant advantage in detecting threats originating from unmanned aerial vehicles. In this context, Qatar has focused on modern radar systems capable of countering unmanned aerial vehicles threats to strengthen its air defense capabilities. In 2022, Qatar also signed various agreements with the Germany-based defense company Rheinmetall, covering counter- unmanned aerial vehicles systems designed to enhance the security of the country's air defense domain.²² The State of Qatar develops diverse collaborations with Europe-based defense companies to modernize its armed forces and align them with advanced technologies. These partnerships primarily focus on the procurement of unmanned aerial vehicles, radar systems, and AI-supported military technologies. This development demonstrates that Qatar is not only increasing its offensive capabilities but also expanding its extra-regional strategic partnerships and adopting a comprehensive approach to the long-term development of its defense industrial infrastructure.

<https://breakingdefense.com/2026/01/barzan-exec-talks-new-business-plan-unveils-agreements-and-new-platforms/>, (Erişim Tarihi: 22 Mart 2026).

²¹ Defense C4, (2026). "Qatar Strengthens Airspace Defense with Thales' Ground Master Radars". <https://www.c4defence.com/en/qatar-thales-gm400-gm200-radar-contract/>, (Erişim Tarihi: 22 Mart 2026).

Conclusion

In conclusion, Saudi Arabia, The United Arab Emirates and Qatar, seeking to adapt to the evolving security architecture of the Gulf region, are pursuing security policies aimed at diversifying their strategic partnerships. Within this framework, these countries have increasingly collaborated with Europe-based defense companies in recent years, aiming to reduce their dependence on The United States, which has historically been the region's primary military supplier. Through this multidimensional partnership strategy, Gulf states are modernizing their defense infrastructure and enhancing the effectiveness of their armed forces through the acquisition of next-generation military technologies. However, the insufficient military expertise and training programs required for the effective utilization of these modern systems represent a significant structural deficiency. The war that began on 28 February 2026 between The United States, Israel and Iran negatively affected the defense security of Gulf countries through an increase in retaliatory attacks targeting their military infrastructure. Systemic security challenges emerged during attempts to intercept and prevent ballistic missile attacks launched from Iran throughout the conflict. Furthermore, the functionality of Gulf states' defense systems and military equipment in the field was called into question in response to Iran's intensified attacks. This situation indicates that Gulf countries have largely based their defense

²² Qatar News Agency, (2022). "The Armed Forces Sign a Number of Cooperation Agreements in the Military Fields". <https://qna.org.qa/en/news/news-details?id=0074-the-armed-forces-sign-a-number-of-cooperation-agreements-in-the-military-fields&date=23/03/2022>, (Accessed: 22 Mart 2026).

modernization on a technology procurement-focused strategy, while elements such as military expertise, comprehensive training programs, and sufficient personnel remain underdeveloped. High-cost defense investments, when not supported by specialized military units have a limited impact on the battlefield. When these elements are lacking, even extensive investments fail to achieve the expected deterrent effect. Moreover, the lack of prior testing regarding how newly acquired defense systems are to be operationally employed raises significant concerns, including preparedness for regional-scale conflicts. As observed in this war, the ballistic missile attacks launched by Iran against Gulf states demonstrated that these defense systems could be breached despite substantial investments, thereby questioning the deterrence value of the deployed technologies. This situation underscores that the effectiveness of defense capacity depends not only on technology-focused investments but also on knowledge, experience, and military expertise. Otherwise, defense systems alone do not generate a meaningful deterrent effect against retaliatory attacks during the course of a conflict.

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