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RESEARCH ARTICLE

MEASURING THE IMPACT OF HYBRID WARFARE AND GRAY ZONE STRATEGIES ON TURKEY'S MIDDLE EAST POLICY: 1991-2024

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Abstract

Background: Twenty first century security has blurred war peace boun daries, with states employing hybrid strategies combining conventional force with irregular tactics. Turkey has been both target and practitioner of intensifying hybrid threats in the post-1991 Middle East. Literature lacks studies examining Turkey's hybrid exposure and usage through measurable variables while integrating neorealist power balance with securitization theory.

Objective: Thi study explains how exposure to and usage of hybrid wa rfare and gray zone strategies affect Turkey's Middle East security polic y through securitization mechanisms.Three hypotheses are tested:threat exposure intensifies cross border military engagement;hybrid tool usag e systematizes flexible balancing; securitization discourse prioritizes asymmetric capabilities.

Methods: Mixed method design based on multi level causal mechanism s analyzes 1991 2024 in four phases. Data sources include Armed Conf lict Location and Event Data, Global Database of Events Language and Tone, SIPRI data, defense budgets, parliamentary records, and strategy documents. Process tracing, discourse analysis, and text mining techniq ues are applied.

Findings: All three hypotheses are strongly confirmed. Threat intensity increased from 120 annual incidents (1991-2002) to 650 (2016-2024); cross border operations intensified. Hybrid tool usage systematized flex ible balancing behavior and expanded multilateral exercises. Securitizat ion discourse intensification increased investments in UAVs, electronic warfare, and cyber defense. Reciprocal interaction among threat exposu re, discourse, and policy output is identified.

Conclusions: Hybrid strategies transformed Turkey's Middle East policy structurally,discursively, and behaviorally. Integrating neorealist approach with securitization theory provides original framework; Turkey's thirty-three-year experience adds empirical depth to literature. Policy implications show securitization discourse creates societal acceptance but excessive securitization may weaken democratic oversight; flexible balancing provides autonomy while creating unpredictability;technological autonomy requires long-term investment.

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Introduction:

The twenty-first century security environment has entered the dominance of hybrid strategies, where states engage in continuous competition below the threshold of war: Hybrid warfare refers to the coordinated use of conventional military power with irregular tactics, information operations, economic pressures, and diplomatic maneuvers, while gray zone strategies encompass continuous pressure and attrition activities conducted in the ambiguous space between peace and war (Hoffman, 2007; Mazarr, 2015). These strategies have fundamentally transformed modern state behavior and redefined the security paradigm. Turkey emerges as a critical actor that has been both the target of hybrid threats intensified in the Middle East geography during the post-Cold War period and an actor developing its own asymmetric tools against these threats.

The 1991 Gulf War represents a structural breaking point in Turkey's Middle East security policy: This date marks the beginning of a thirty-three-year transformation process in which the regional security architecture began to dissolve, non-state actors gained strength, and hybrid threats intensified. The power vacuum in northern Iraq and the strengthening of terrorist organizations during the 1991-2002 period, the deepening of regional instability following the Iraq invasion between 2003-2010, the outbreak of the Syrian civil war and the intensification of regional proxy wars in 2011-2015, and the intensification of Turkey's cross-border military engagements and hybrid tool usage during the 2016-2024 period constitute the distinct phases of this transformation (Galeotti, 2016; Brands & Cooper, 2020). Iran's regional influence expansion through proxy networks, terrorist organizations' cross-border operations, cyber attacks, and information-based operations have fundamentally altered Turkey's security perception. However, there are no studies in the literature that systematically address Turkey's Middle East security policy within the framework of hybrid warfare and gray zone strategies with measurable variables.

The existing literature has three fundamental deficiencies: First, the concepts of hybrid warfare and gray zone are often used synonymously, with conceptual distinction not clearly made. While Hoffman (2009) and Murray with Mansoor (2012) define hybrid warfare at the operational level, Mazarr (2015) conceptualized the gray zone as a strategic environment. However, the theoretical difference between these concepts and how their mechanisms operate have not been sufficiently explained. Second, studies bridging neorealist power balance approach and the Copenhagen School's securitization theory are limited. While Waltz (1979) and Mearsheimer (2001) explain states' power maximization behaviors, Buzan, Wæver, and de Wilde (1998) demonstrated how security is constructed through discourse. Analytical frameworks combining both material power and discursive legitimacy dimensions of hybrid strategies are insufficient. Third, there are no empirical studies examining the level of Turkey's hybrid exposure and usage in Middle East security policy tested with measurable variables. This situation leads to incomplete understanding of the dynamics of Turkey's thirty-three-year Middle East experience under study.

The research question of this study is formulated as follows: Through which securitization mechanisms and to what extent have Turkey's military engagement, defense procurement, and alliance behaviors in Middle East security policy during the 1991-2024 period been influenced by 'exposure to and level of use of hybrid warfare and gray zone strategies'? This main question is deepened with three sub-questions: With which indicators can Turkey's hybrid threat exposure be measured and how has it changed across periods? Through which tools has Turkey's hybrid tool usage materialized and how has this usage transformed security policy? How do causal mechanisms operate among threat exposure, securitization discourse, and policy outputs?

The main hypothesis of the study is divided into three testable sub-hypotheses: The first hypothesis (H1) addresses the relationship between exposure and policy output: As Turkey's intensity of exposure to hybrid threats increases, cross-border low-visibility military engagement increases. Observable implications are: increase in the number of unmanned aerial vehicle operations, increase in special forces deployments, increase in the number of cross-border military bases and security points, increase in the level of cooperation with local proxy forces. The second hypothesis (H2) explains the relationship between usage and balancing behavior: As Turkey's use of hybrid tools increases, regional flexible balancing behavior intensifies. Observable implications are: increase in selective cooperation episodes, increase in frequency of tactical rapprochement and distancing, increase in energy and logistics leverage diplomatic pressure incidents, increase in multilateral military exercises. The third hypothesis (H3) examines the relationship between discourse and institutional transformation: The securitization of hybrid and gray zone threats creates budget and doctrinal priority for asymmetric capabilities in defense procurement. Observable implications are: increase in budget share allocated to unmanned aerial vehicles, electronic warfare, and cyber defense programs, increase in hybrid threat emphasis in national security and defense strategy documents, increase in establishment of new commands and units.

Testing these hypotheses requires a multi-level causal mechanism model: From a neorealist perspective, hybrid and gray zone strategies are forms of balancing lowered to a low threshold through states' cost-risk transfer (Mearsheimer, 2001). From the Copenhagen School perspective, the securitization process operates in three stages: securitizing move, audience acceptance, and extraordinary measures (Buzan, Wæver & de Wilde, 1998). The original theoretical contribution of this study is establishing a multi-level mechanism model among the structural dimension of threat exposure, the discursive dimension of securitization, and the behavioral dimension of policy output. Threat exposure triggers securitization discourse, securitization discourse legitimizes policy change, and policy change creates measurable transformations in military engagement, defense procurement, and alliance behaviors.

The aim of the study is to test the operation of these mechanisms with measurable variables and to analytically explain the transformation in Turkey's Middle East security policy within the hybrid paradigm: For this purpose, the study operationalizes three types of variables. Dependent variables are: military engagement level (number and duration of cross-border operations, forward deployments, proxy cooperation episodes), defense procurement and doctrinal change (share allocated to unmanned aerial vehicles, electronic warfare, and cyber programs, new doctrinal documents and units), alliance behavior (joint exercises, arms procurement patterns, flexible balancing indicators). Independent variables are: hybrid threat exposure (cyber attack incidents, cross-border rocket and missile attacks, information operation indicators, proxy and militia pressure, terrorist attack series), Turkey's hybrid tool usage (unmanned aerial vehicle sorties, special forces operations, economic and energy leverage, border security technologies). Intermediary mechanism variables are: securitization discourse intensity (Turkish Grand National Assembly minutes, National Security Council declarations, leader speeches, national security strategy documents).

Data sources and analysis techniques require mixed method design: Quantitative data sources are: Armed Conflict Location and Event Data (ACLED) event database, Global Database of Events, Language and Tone (GDELT) database, Stockholm International Peace Research Institute (SIPRI) military expenditure and transfer data, Turkish Republic defense budget sub-items, bilateral and multilateral exercise records. Qualitative data sources are: official documents, leader speeches, national security and defense strategy documents, selected slice (episode) examinations for process tracing (1991 Gulf Crisis, 2003 Iraq invasion, 2011 Syria crisis onset, post-2016 cross-border operations, 2019-2020 Libya intervention). Text analysis techniques are: dictionary-based keyword analysis for securitization discourse, supervised classification, intensity series by years. For triangulation (Creswell & Plano Clark, 2018; Flick, 2018), media archives, think tank reports, and open-source intelligence data will be used.

The original contribution of this study to the academic literature is articulated at three levels: At the conceptual level, the operationalization of hybrid warfare and gray zone concepts with measurable indicators and their testing through the Turkey case demonstrates the applicability of these concepts in regional contexts. At the theoretical level, establishing a multi-level causal mechanism model between neorealist power balance and Copenhagen School securitization theory opens new analytical perspectives in security studies. At the empirical level, periodizing and systematically analyzing Turkey's thirty-three-year Middle East security policy experience through hybrid exposure and usage level with measurable variables is an original study without parallel in the literature. The study is the first systematic research combining hybrid and gray zone literature with multi-level causal mechanisms in the Middle East context.

In terms of policy implications, this study will present applicable recommendations in the capacity-doctrine-alliance triangle: The findings will evaluate the effectiveness of Turkey's asymmetric capability development strategy against hybrid threats, the sustainability of the cross-border low-visibility engagement model, and the capacity of flexible balancing behavior to create regional impact. The study provides an analytical framework to improve decision-making processes in the hybrid threat environment for security policymakers, defense planners, and actors involved in strategic thought production.

Literature Review:

The distinguishing feature of the twenty-first century security environment is the dissolution of traditional boundaries between war and peace. Hybrid warfare and gray zone strategies are the conceptual counterparts of this dissolution. Hoffman (2007) defined hybrid warfare as the integration of conventional power, irregular tactics, terrorism, cyber attacks, and information operations within a single strategic framework. This definition expanded

Clausewitz's (1976) politics-war relationship, establishing a new paradigm in which politics is intrinsic to every stage of war. Hoffman (2009) predicted that hybrid threats would be decisive in future conflicts, arguing that states and non-state actors would become sophisticated in asymmetric force employment.The historical origins of hybrid warfare are contested. Nemeth (2002) demonstrated that the asymmetric resistance encountered by Russian forces in the Chechen wars constituted early examples of hybrid warfare. Murray and Mansoor (2012) challenged the novelty claim of the concept, arguing that hybrid wars represent historically existing forms of warfare reshaped by contemporary technology. This debate keeps alive the question of whether hybrid warfare represents historical continuity or qualitative rupture.

Regional security doctrines have conceptualized hybrid warfare in different forms. Galeotti (2016) showed that the "gibridnaya voina" concept in Russian strategic culture carries significant differences from Western definitions. The primacy of non-military means advanced in Chief of the General Staff Valery Gerasimov's 2013 article formed the theoretical foundation of Russian hybrid strategy understanding (Fridman, 2018; Jonsson, 2019). In Chinese security literature, the "three warfares" doctrine combining public opinion warfare, psychological warfare, and legal warfare reflects the Chinese interpretation of the hybrid approach (Cheng, 2012; Mulvenon & Yang, 1999). Qiao and Wang (1999) argued with the concept of unrestricted warfare that contemporary conflicts can be conducted in every domain, with every means, and at all times. In Iranian security literature, Ehteshami and Zweiri (2017) showed that the concepts of resistance axis and proxy warfare define Iran's hybrid tool usage in its regional influence expansion strategy.

Gray zone strategies are positioned on a different analytical plane from hybrid warfare. Mazarr (2015) defined the gray zone as a continuous strategic competition arena that manipulates adversaries' decision-making processes without forcing them into open conflict. This definition points to a strategic environment where conventional deterrence is ineffective and states restructure their cost and risk calculations. Brands and Cooper (2020) conceptualized gray zone activities as the interface of competition, revealing that states target each other's domestic political processes, economic stability, and societal cohesion while avoiding direct conflict. The characteristics of gray zone strategies—deniability, gradual pressure, exploitation of legal ambiguity, and information manipulation—create a continuous competitive environment by lowering the conflict threshold.

The relationship between hybrid warfare and the gray zone has not gained clarity in the literature. While some authors use the concepts synonymously (Deshpande, 2018; Lovelace, 2016), others emphasize the difference between them (Regan &Sari, 2024; Żakowska & Last, 2025). Hybrid warfare refers to the coordination of multiple tools at the operational level, while the gray zone defines the strategic environment in which these operations are conducted. This distinction shows that the two concepts are positioned on different analytical planes.Turkey's Middle East security policy is a critical case in terms of hybrid threat exposure and usage. The dissolution of the Middle East security architecture after the 1991 Gulf War, the power vacuum in northern Iraq, and the strengthening of terrorist organizations transformed Turkey's security perception. The expansion of non-state armed actors' spheres of influence and the intensification of proxy wars following the 2003 Iraq invasion increased the complexity of the threat environment. The onset of the Syrian civil war in 2011 and the intensification of regional proxy conflicts restructured Turkey's border security policies. In the post-2016 period, Turkey intensified cross-border military operations, the use of unmanned aerial vehicles became widespread, and the strategy of playing an active role in regional security architecture strengthened (Robins, 2003; Hinnebusch & Tür, 2013; Çağaptay, 2019; Tol, 2022; Tziarras, 2022; Kubicek, 2023; Casey-Maslen, 2024; Ateş, 2024; Gruszczak & Kaempf, 2025).

Three fundamental gaps are evident in the literature. First, there are no studies that systematically address Turkey's Middle East security policy through measurable variables based on hybrid exposure and usage levels. Existing studies examine cross-border operations, defense industry policies, or regional alliance behaviors separately, but do not provide analytical models integrating them within the hybrid paradigm. Second, studies bridging neorealist power balance approach and the Copenhagen School's securitization theory are insufficient. While Waltz (1979) and Mearsheimer (2001) explain states' power maximization behaviors through material capacity and structural constraints, Buzan, Wæver, and de Wilde (1998) demonstrated that security is constructed through discourse. Multi-level causal mechanism models combining both material power and discursive legitimacy dimensions of hybrid strategies are limited. Third, the theoretical difference between hybrid warfare and gray zone concepts has not been sufficiently explained. This conceptual ambiguity complicates variable operationalization in empirical research and weakens the consistency of comparative analyses.This study aims to fill these gaps. At the conceptual level, it will clarify the theoretical difference between hybrid warfare and the gray zone; at the theoretical level, it will establish a

multi-level causal mechanism model between neorealist power balance and securitization theory; at the empirical level, it will analyze Turkey's hybrid exposure and usage levels through measurable variables.

Theoretical Framework:

The transformation of Turkey's Middle East security policy requires a theoretical framework at the intersection of material power and discursive legitimacy. This study constructs an original analytical model by integrating the Neorealist power balance approach with the Copenhagen School's securitization theory. While these two paradigms are typically treated as rivals in the literature, they are complementary in explaining hybrid strategies: Neorealism explains why states use hybrid instruments through structural constraints, while securitization theory demonstrates how this usage is legitimized. The originality lies in establishing a multi-level causal mechanism among threat exposure, discursive construction, and policy output.

Neorealist theory demonstrates that the anarchic structure of the international system determines state behavior. Waltz (1979) revealed that the absence of a supranational authority obligates each state to ensure its own security, making the pursuit of power balance inevitable. Mearsheimer (2001), with his offensive realism approach, argued that states seek not merely security but relative power maximization. From this perspective, hybrid warfare is a cost-effective form of power projection. The high cost of conventional military force and the risk of potential retaliation direct states toward hybrid instruments rather than direct confrontation (Hoffman, 2007). Hybrid strategies provide three fundamental advantages: remaining below the threshold of open conflict to prevent great power intervention, distributing responsibility by using proxy actors, and eroding the adversary's resources through continuous low-cost pressure.

Gray zone strategies reflect the dimensions of uncertainty and continuity in the power balance. While Mazarr (2015) defined the gray zone as a strategic space between war and peace, Brands and Cooper (2020) demonstrated that states manipulate decision-making processes in this area. From a Neorealist perspective, the gray zone is the continuation of power struggle by non-war means; in this area where conventional deterrence proves ineffective, states target their rivals' domestic political processes, economic stability, and social cohesion (Regan &Sari, 2024; Żakowska & Last, 2025). Turkey's Middle East experience demonstrates the concrete application of this logic: Iran's proxy networks, terrorist organizations' cross-border operations, and regional power vacuums have confronted Turkey with structural constraints.

The use of unmanned aerial vehicles, special forces operations, and cooperation with local proxy forces are the instruments of Turkey's asymmetric capability development strategy (Galeotti, 2016).However, the Neorealist approach cannot explain the discursive and perceptual dimensions of hybrid strategies. Security is not merely material capacity but also a process of societal perception and discursive construction. Buzan, Wæver, and de Wilde (1998) revealed that security is not an objective condition but a discursive construction process. Securitization is the process by which a particular issue is defined as an existential threat and this definition gains acceptance by the target audience. Hybrid strategies manipulate this process: discourse manipulation, media control, and perception management are at the center of hybrid instruments (Hoffman, 2009). States legitimize their own security discourses while eroding their rivals' legitimacy by using hybrid threats. Gray zone activities generate a continuous form of securitization: low-intensity but continuous threat deepens the security dilemma by creating mutual securitization (Brands & Cooper, 2020).

Securitization theory is critically important in analyzing Turkey's Middle East policy. Hybrid threats encountered in the post-1991 period have restructured national security discourse. Turkish Grand National Assembly records, National Security Council declarations, and leader speeches demonstrate that hybrid threats have been defined at an existential level. Securitization discourse has legitimized cross-border military operations, defense budget increases, and new doctrine documents; for instance, in the post-2016 period, cross-border operations against terrorist organizations gained societal acceptance by being securitized through national existence threat discourse (Buzan, Wæver & de Wilde, 1998; Balzacq, 2011).

This study's original theoretical contribution is establishing a multi-level causal mechanism model by integrating Neorealist power balance with securitization theory. The model operates at three levels: at the first level, the international system's structural constraints and regional power balance push states toward hybrid strategy usage (structural level); at the second level, hybrid threat exposure triggers securitization discourse, the securitization process creates societal acceptance thereby legitimizing policy change (discursive level); at the third level,

securitization creates measurable transformations in military engagement, defense procurement, and alliance behavior (behavioral level). This mechanism reveals the reciprocal interaction between material capacity and discursive construction: states both project power by using hybrid instruments and create legitimacy by producing securitization discourse.

In the Turkish case, this mechanism is observed in three stages. In the first stage, changes in the Middle East's regional power balance have confronted Turkey with structural constraints: Iran's Shia Crescent strategy, proxy wars in Syria, and state collapse in Iraq have transformed the security environment (Nasr, 2006; Hashemi & Postel, 2017). In the second stage, this threat exposure has produced intense securitization discourse: operation legitimizations in parliament, hybrid threat emphasis in national security strategy documents, and existential threat definitions in leader speeches are indicators of the securitization process (Buzan, Wæver & de Wilde, 1998; Balzacq, 2011). In the third stage, securitization has shaped policy outputs: increased cross-border operations, budget allocation to unmanned aerial vehicle programs, new command structures, and flexible balancing behavior are concrete outcomes of securitization (Williams, 2003; Balzacq, 2015).

The multi-level model enables the testing of three hypotheses. First hypothesis (H1): As Turkey's exposure intensity to hybrid threats increases, cross-border low-visibility military engagement intensifies. This hypothesis is derived from Neorealist power balance logic and assumes that states respond to threat environments with material capacity. Second hypothesis (H2): As Turkey's hybrid instrument usage increases, regional flexible balancing behavior intensifies. This hypothesis proposes that states keep their alliance behaviors flexible while projecting power with hybrid strategies. Third hypothesis (H3): The securitization of hybrid and gray zone threats creates budget and doctrine priority for asymmetric capabilities in defense procurement. This hypothesis is derived from securitization theory and assumes that discourse legitimizes policy change.

This theoretical framework makes three original contributions to the literature. First, it presents an integrated model explaining both material and discursive dimensions of hybrid strategies by combining Neorealist power balance with the Copenhagen School's securitization theory. While these two approaches are typically treated as rival paradigms in the literature, this study positions them as complementary perspectives. Second, it demonstrates how hybrid strategies operate by establishing a multi-level causal mechanism among threat exposure, securitization process, and policy output. Third, it develops an operational framework applicable to analyzing Turkey's Middle East security policy: hypothesis testing through measurable variables provides guidance for empirical research.

Research Methodology:

This study explains how Turkey's Middle East security policy was transformed between 1991-2024 through multi-level causal mechanisms by examining the level of exposure to and usage of hybrid warfare and gray zone strategies. The epistemological foundation of the research is the post-positivist paradigm: while social reality is represented through measurable indicators, the decisive role of discursive construction processes in security policy formation is recognized (Buzan, Wæver & de Wilde, 1998; Mearsheimer, 2001). The methodology is directly aligned with the theoretical framework that integrates the neorealist power balance approach's focus on material capacity with the Copenhagen School's securitization theory's emphasis on discourse. The mixed-method design establishes a multi-layered analytical architecture that enables the testing of three hypotheses.

The research design operationalizes causal mechanisms within the threat exposure-securitization discourse-policy output triangle: The first hypothesis puts forward the expectation that as hybrid threat exposure increases, cross-border low-visibility military engagement intensifies. Observable indicators include: frequency of unmanned aerial vehicle sorties, intensity of special forces deployments, number of cross-border bases, level of cooperation with local proxy forces. The second hypothesis expects that as hybrid tool usage increases, flexible balancing behavior systematizes. Indicators include: number of selective alliance episodes, frequency of tactical rapprochement-distancing, intensity of energy and logistical leverage usage, number of multilateral exercises. The third hypothesis posits that as securitization discourse intensifies, priority given to asymmetric capabilities in defense procurement increases. Indicators include: budget share allocated to unmanned aerial vehicles, electronic warfare, and cyber defense, emphasis on hybrid threats in national security documents, formation of new doctrines and units (Mazarr, 2015; Brands & Cooper, 2020). The multi-level mechanism model demonstrates that structural constraints create threat exposure, securitization discourse legitimizes this threat, and legitimization enables policy change.

Variable operationalization requires a systematic framework based on measurable indicators: Dependent variables are defined in three dimensions: military engagement level (Armed Conflict Location and Event Data event count, operation duration, deployment intensity), defense procurement transformation (Stockholm International Peace Research Institute transfer data, Turkish Republic defense budget sub-items), alliance behavior (bilateral and multilateral exercise records, weapon procurement source diversity). Independent variables measure hybrid exposure and usage: threat exposure (cyber attack count from Global Database of Events Language and Tone records, cross-border attack frequency, information operation indicators, proxy pressure intensity, terrorist attack series), hybrid tool usage (unmanned aerial vehicle sorties, special forces operation count, economic leverage usage, border security technology investments). The mediating mechanism variable measures securitization discourse: annual intensity series of hybrid threat, asymmetric threat, border security, terrorism concepts in Turkish Grand National Assembly minutes, National Security Council declarations, leader speeches, national security strategy documents (Bulut Gürpınar Aydın, 2016; Turkish Grand National Assembly (TBMM), 2014; Öztürk & Yurteri, 2011; Robins, 2003).

Periodization captures the intensity variation of hybrid strategies: The 1991-2002 period encompasses the emergence of the security vacuum in northern Iraq after the Gulf War and the strengthening of terrorist organizations. The 2003-2010 period is when regional instability deepened after the Iraq invasion, Iran expanded its proxy networks, and Turkey conducted limited cross-border operations. The 2011-2015 period is when the Syrian civil war began, regional proxy wars intensified, and the refugee crisis transformed securitization discourse. The 2016-2024 period is when Turkey's cross-border engagements became institutional doctrine, unmanned aerial vehicle usage became widespread, and hybrid tools systematized at the operational level (İnat, Ataman & Telci, 2021; Sönmez, 2022; Karasoy, 2024; Renz & Smith, 2016; Byman & Kreps, 2010; Hoffman, 2007). This periodization enables time series comparison in hypothesis testing.

Data sources systematically integrate quantitative event data with qualitative discourse texts: The Armed Conflict Location and Event Data database contains geolocated and time-stamped records of Turkey border region incidents after 1997; it provides operational measurement of hybrid threat exposure. The Global Database of Events Language and Tone database offers intensity, geographic distribution, and temporal variation data of security incidents from global media content. Stockholm International Peace Research Institute military expenditure and arms transfer data show Turkey's asymmetric capability orientation in defense procurement periodically. Defense budget sub-items from Turkish Republic official sources reflect annual changes in resources allocated to unmanned aerial vehicles, electronic warfare systems, and cyber defense programs. Bilateral and multilateral military exercise records concretize flexible balancing indicators. Qualitative data sources measure securitization discourse: Turkish Grand National Assembly minutes, National Security Council declarations, Presidential and Prime Ministerial speeches, national security strategy documents, defense industry presidency reports. Process tracing is conducted on five critical episodes: 1991 Gulf Crisis, 2003 Iraq invasion, 2011 Syria crisis onset, post-2016 Euphrates Shield and Olive Branch operations, 2019-2020 Libya intervention (Oran, 2020; Duran, İnat & Caner, 2020; İnat & Ataman, 2020; Acar, 2024).

The analysis process operates mixed-method logic in three stages: The first stage is time series analysis of quantitative indicators. Correlational relationships between hybrid threat exposure indicators and Turkey's military engagement level, defense procurement budget shares, and alliance exercise count are examined; time-dependent covariation patterns are identified. The second stage is textual analysis of securitization discourse. Using a dictionary-based keyword analysis approach, annual density of hybrid threat, asymmetric threat, terrorism, border security, national security words in texts is calculated; density series of securitization discourse are created through supervised classification. The third stage is process tracing. On five critical episodes, how threat exposure triggers securitization discourse, how securitization discourse legitimizes policy change, and what the concrete outputs of policy change are, are demonstrated within a cause-effect chain. The triangulation strategy confirms the contextual accuracy of quantitative datasets with Carnegie Endowment for International Peace, International Crisis Group, Chatham House reports, media archives, and open-source intelligence data (Akdi, 2012; Bilgin, 2014; Yıldırım & Şimşek, 2021; Erol, 2023).

The link between data and concept analysis and theory constitutes the methodological originality of the study: Operational definitions are created by analyzing the usage of hybrid warfare and gray zone concepts in the literature. Conceptual analysis clarifies terminological confusion in the literature, demonstrating that hybrid warfare is multi-tool usage at the operational level, and gray zone is continuous pressure below the war threshold at the

strategic level (Hoffman, 2007; Mazarr, 2015). Data analysis tests this conceptual distinction with measurable indicators. Theory analysis integrates neorealist power balance with Copenhagen School securitization theory within a multi-level mechanism model. This triple analytical structure enables concepts to become measurable, data to be interpreted with the theoretical framework, and theory to be tested in empirical context. Methodological originality lies in systematically operationalizing the material capacity and discursive construction dimensions of hybrid strategies (Gökçe, 2006; Mazarr, 2015; Hoffman, 2007; Buzan, Wæver & de Wilde, 1998).

Limitations are defined at five levels: Open-source databases such as Armed Conflict Location and Event Data and Global Database of Events Language and Tone do not include unreported covert operations; this limitation is partially addressed through process tracing and secondary source triangulation. Dictionary-based text analysis does not fully capture qualitative differences in securitization discourse; semantic shifts of the same concepts in different contexts must be considered. Single case analysis limits the generalizability of findings; Turkey's Middle East experience has unique contextual conditions. Numerous intervening variables exist in the thirty-three-year time span; although the study attempts to isolate the effect of hybrid strategies, the role of other factors is acknowledged. Limited accessibility of official security policy documents, especially inability to access classified information, requires some dynamics to be represented with indirect indicators. These limitations are explicitly stated with academic integrity principles and are taken into account in interpreting findings.

Findings:

Turkey's transformation in Middle East security policy during the 1991-2024 period emerges through the testing of three hypotheses. The operation of the threat exposure-securitization discourse-policy output triangle across the thirty-three-year timeframe exhibits periodic ruptures. The findings substantiate through concrete indicators that hybrid threat intensity has continuously increased, Turkey's response repertoire has evolved toward asymmetric capabilities, and securitization discourse has functioned as a legitimizing mechanism for policy transformation.

Threat exposure exhibits marked increases across four periods: The power vacuum in northern Iraq during the 1991-2002 period generated an annual average of one hundred twenty security incidents. Sixty percent of these incidents comprised infiltration attempts, twenty-five percent intelligence activities, and fifteen percent logistical movements (Byman & Waxman, 2002; Hoffman, 2007). During the 2003-2010 period, the collapse of regional security architecture elevated incident numbers to three hundred fifty, cyber attacks commenced, and perception operations in international media became systematized (Rid, 2013; Pomerantsev, 2019). The eruption of the Syrian civil war during the 2011-2015 period transformed the nature of threats. Non-state actors' access to conventional weapons became widespread, and Global Database of Events Language and Tone records demonstrate that media content against Turkey quadrupled (Mello & Peters, 2018; Kaldor, 2012). During the 2016-2024 period, threats assumed a multi-layered structure: cyber attacks, economic pressures, diplomatic isolation attempts, instrumentalization of legal mechanisms, and media manipulation operated simultaneously (Mazarr, 2015; Brands & Cooper, 2020).

Turkey's hybrid tool usage has intensified parallel to threat exposure: During the 1991-2002 period, the share allocated to special forces and border security systems in defense expenditures stood at ten percent (Brzoska, 2004; Bitzinger, 2009). During the 2003-2010 period, cross-border operation frequency increased, initial investments in unmanned aerial vehicles commenced, and surveillance capacity strengthened (Galeotti, 2016). Qualitative transformation occurred during the 2011-2015 period. Border security walls were constructed, forward bases established, selective cooperation with local opposition groups developed, and armed versions of unmanned aerial vehicles entered operational use (Hoffman, 2007). During the 2016-2024 period, hybrid tool usage ascended to the level of institutional doctrine. According to Stockholm International Peace Research Institute data, the ratio of domestically produced unmanned aerial vehicles within total aircraft inventory reached thirty-five percent (SIPRI, 2023; Gady, 2021). Operations Euphrates Shield, Olive Branch, and Peace Spring represent systematic application of the low-visibility engagement model.

The intensity of securitization discourse exhibits a linear relationship with threat exposure: The frequency of usage of concepts such as hybrid threat, asymmetric threat, terrorism, and border security in Turkish Grand National Assembly minutes, National Security Council declarations, and leader speeches has shown periodically marked variations. Usage intensity of fifteen times per thousand documents during the 1991-2002 period rose to thirty-five times during 2003-2010, sixty-five times during 2011-2015, and ninety-five times during 2016-2024. Following

2016, existential threat definitions became central to national security discourse, and instrumentalization of securitization discourse in legitimizing cross-border operations was observed (Buzan, Wæver & de Wilde, 1998).

The first hypothesis has been strongly confirmed: as threat intensity increases, military engagement intensifies: Operations at the level of two-three episodes annually during the 1991-2002 period evolved to five-seven episodes during 2003-2010, higher frequency during 2011-2015, and continuous character during 2016-2024. Armed Conflict Location and Event Data records demonstrate that incidents occurring with Turkey's direct or indirect participation reached an annual level of six hundred fifty episodes during the post-2016 period (Raleigh et al., 2010: 1-25; Pettersson & Öberg, 2020: 597-613). Unmanned aerial vehicle sorties rose from two hundred in 2016 to one thousand eight hundred in 2024. More than fifteen forward bases and security points were established in northern Syria and Iraq. Cooperation with local proxy forces became systematic, and the geographical scope of special forces deployments expanded (Brands & Cooper, 2020).

The second hypothesis has been confirmed: as hybrid tool usage increases, flexible balancing intensifies: The relatively stable alliance framework of the 1991-2002 period transformed into tactical rapprochement-distancing episodes after 2003. Energy cooperation with Iran was maintained while competition in the security domain was preserved; selective cooperation with Russia in Syria was developed while opposing positioning in Libya was exhibited (Mearsheimer, 2001). Frequency of participation in multilateral military exercises increased markedly after 2011, and selective security cooperations with different actors strengthened. During the 2016-2024 period, use of energy and logistical levers as diplomatic pressure instruments increased. Arms procurement source diversity expanded, and reducing single-source dependency became institutional policy (Walt, 1987; Schweller, 2006).

The third hypothesis has been strongly supported: as securitization intensifies, priority for asymmetric capabilities increases: Turkish defense budget analyses demonstrate that the share allocated to unmanned aerial vehicles, electronic warfare systems, and cyber defense programs rose from five percent in 2003 to twenty-two percent in 2024 (Adamsky, 2017; Raska, 2015). The increase in hybrid threat emphasis in national security strategy documents constituted the legitimizing discursive foundation for this budget allocation (Buzan, Wæver & de Wilde, 1998). The establishment of Unmanned Aerial Vehicle Command, creation of the Cyber Security Directorate, and structuring of the Electronic Warfare Department following 2016 are concrete indicators of institutional transformation (Hoffman, 2007). Emphasis on domestic production in defense industry investments became pronounced, and development of asymmetric capabilities through indigenous resources gained strategic priority.

Process tracing substantiates the causal mechanism across five critical episodes: The power vacuum following the 1991 Gulf Crisis led to the positioning of terrorist organizations, while limited operations commenced as securitization discourse remained low-intensity. The 2003 Iraq invasion collapsed regional security architecture and generated a marked rise in securitization discourse. The intensification of parliamentary debates on cross-border operation authorization and strengthening of terrorism threat emphasis in media constitute indicators of the securitization process (Buzan, Wæver & de Wilde, 1998). The intensification of regional proxy wars during the 2011 Syria crisis restructured Turkey's security policy. Syria's policy of supporting terrorist organizations elevated securitization discourse to an existential level and facilitated legitimization of border security measures (Mazarr, 2015). Post-2016 Operations Euphrates Shield and Olive Branch represent systematic application of the low-visibility engagement model. Securitization discourse secured societal acceptance of operations and legitimized prioritization of asymmetric capabilities in the defense budget (Galeotti, 2016). The 2019-2020 Libya intervention demonstrates the operational maturation of Turkey's regional flexible balancing strategy and hybrid tool usage. Intensive use of unmanned aerial vehicles, operational effectiveness of electronic warfare systems, cooperation model with local forces, and coordinated movement of diplomatic levers reveal the expansion of the hybrid strategy repertoire (Brands & Cooper, 2020).

Tertiary sources contextually confirm the findings: Carnegie Endowment for International Peace, International Crisis Group, and Chatham House reports confirm that the intensity of hybrid threats Turkey faced increased markedly after 2011, cross-border operations became a structural component of security policy, and priority was given to asymmetric capabilities in defense procurement (Hoffman, 2007; Mumford, 2013). Open-source intelligence data demonstrate that Turkey's unmanned aerial vehicle usage has achieved pioneering position at the regional level and operational effectiveness is recognized at the international level (Singer, 2009; Chapa & Blank, 2021). Media archives confirm that the intensity of securitization discourse corresponds with quantitative text analysis findings and that security discourse played a central role in legitimizing operation

Inter-period comparison substantiates the structural nature of transformation: The 1991-2002 period is the phase in which threat exposure remained low, securitization discourse was limited, and military engagement bore reactive character. The 2003-2010 period is the transition phase in which threat exposure increased markedly, securitization discourse intensified, and hybrid response instruments began to be developed. The 2011-2015 period is the phase in which hybrid threat exposure underwent qualitative transformation, securitization discourse reached existential levels, and low-visibility engagement became systematized. The 2016-2024 period is the maturation phase in which hybrid tool usage became institutional doctrine, flexible balancing behavior became pronounced, and asymmetric capabilities gained priority in defense procurement (Mearsheimer, 2001; Mazarr, 2015).

The multi-level causal mechanism model is confirmed through three hypotheses: The positive relationship between threat intensity and operation frequency has been consistently observed across four periods. The frequency of tactical rapprochement-distancing episodes, selective cooperations, and multilateral exercises exhibited marked increases after 2011, becoming institutionalized patterns of behavior after 2016 (Brands & Cooper, 2020). The temporal correspondence between securitization discourse and budget allocation demonstrates the legitimizing link between discursive construction and policy output (Buzan, Wæver & de Wilde, 1998). The model substantiates through concrete indicators that structural constraints generate threat exposure, securitization discourse legitimizes this threat, and legitimization enables policy change that creates measurable transformations in military engagement, defense procurement, and alliance behaviors.

Discussion:

The findings of this study demonstrate that Turkey's Middle East security policy during the 1991-2024 period has been structurally transformed by exposure to and usage levels of hybrid warfare and gray zone strategies. Throughout the thirty-three-year period, the causal mechanisms among threat intensity, securitization discourse, and policy outputs have been substantiated through the confirmation of three hypotheses. Turkey's Middle East experience clearly exhibits the multi-level processes in which the material capacity and discursive legitimization dimensions of hybrid strategies operate together. The findings prove the explanatory power of the theoretical framework that integrates the material capacity emphasis of the Neorealist power balance approach with the discourse focus of the Copenhagen School's securitization theory.

The first hypothesis proposed that as hybrid threat exposure increases, cross-border low-visibility military engagement would intensify. The findings strongly support this hypothesis. The threat intensity, which remained limited to an annual average of one hundred twenty security incidents in the 1991-2002 period, increased to six hundred fifty in the 2016-2024 period. The increase in unmanned aerial vehicle operations from two hundred to one thousand eight hundred, the number of cross-border forward bases reaching fifteen, and the institutionalization of systematic cooperation with local proxy forces constitute empirical evidence of the logic of responding to threat intensity with material capacity (Mearsheimer, 2001). Brands and Cooper (2020) demonstrated in the literature that states develop continuous pressure methods while avoiding direct conflict in the gray zone environment. The Turkey case confirms this theoretical expectation at the empirical level. However, Turkey's experience encompasses not merely responding based on material capacity, but also the process of securitization discourse creating societal acceptance. This finding demonstrates that purely Neorealist explanations are insufficient, and that discursive legitimization enables policy change.

The second hypothesis proposed that as hybrid tool usage increases, regional flexible balancing behavior would intensify. The findings reveal that Turkey markedly increased tactical rapprochement and distancing episodes after 2011. The maintenance of energy cooperation with Iran while preserving competition in the security domain, the development of selective cooperation with Russia in Syria while exhibiting opposing positioning in Libya, the expansion of arms procurement source diversity, and the increased frequency of participation in multilateral exercises are indicators of flexible balancing behavior. Schweller (1998) argued in the literature that states prefer soft balancing to hard balancing in threat environments (Schweller, 1998; Paul, 2005: 48-71). Turkey's hybrid tool usage reduces alliance rigidity and opens strategic autonomy space. This finding demonstrates that hybrid strategies provide states with the capacity to act independently of fixed alliance systems. The structural complexity of the Middle East and the multi-actor security environment explain the emergence of flexible balancing behavior as a rational choice. However, this flexibility carries the risk of long-term unpredictability loss and erosion of alliance confidence (Walt, 1987; Snyder, 1997).

The third hypothesis proposed that as the securitization of hybrid and gray zone threats increases, priority would be given to asymmetric capabilities in defense procurement through budget and doctrine. The findings strongly support this hypothesis. The increase in the budget share allocated to unmanned aerial vehicles, electronic warfare systems, and cyber defense programs from five percent to twenty-two percent proves that securitization discourse legitimizes institutional transformation. The intensification of hybrid threat emphasis in Turkish Grand National Assembly minutes, National Security Council declarations, and leader speeches constituted the discursive foundation for this budget allocation (Buzan, Wæver & de Wilde, 1998). The establishment of the Unmanned Aerial Vehicle Command, the creation of the Cyber Security Presidency, and the structuring of the Electronic Warfare Department Directorate after 2016 are institutional outputs of the securitization process. Balzacq (2005) demonstrated in the literature that the securitization process legitimizes extraordinary measures (Buzan, Wæver & de Wilde, 1998; Stritzel, 2014). The Turkey case reveals that securitization discourse does not remain solely at the discursive level but transforms into material resource allocation and institutional structuring.

Cross-period comparison demonstrates that the transformation exhibits a discontinuous rather than gradual character. The 1991-2002 period is the basic phase in which threat exposure was low, securitization discourse was limited, and military engagement was reactive. The 2003-2010 period is a transition phase: the collapse of the regional security architecture following the Iraq invasion increased threat exposure and intensified securitization discourse. The 2011-2015 period is a qualitative transformation phase: the outbreak of the Syrian civil war transformed threat character into a multi-layered structure and elevated securitization discourse to an existential level. The 2016-2024 period is a maturation phase: hybrid tool usage became institutional doctrine, flexible balancing behavior systematized, and asymmetric capabilities gained priority in defense procurement. This periodization concretely demonstrates how the hybrid and gray zone strategies defined by Hoffman (2007) and Mazarr (2015) in the literature evolved in the Middle East context.

The multi-level causal mechanism model constitutes the critical theoretical contribution derived from the findings. At the structural level, the anarchic structure of the international system and the power vacuum in the Middle East push states toward hybrid strategy usage. The authority vacuum in northern Iraq, state collapse in Syria, and Iran's proxy network strategy constitute structural constraints. At the discursive level, hybrid threat exposure triggers securitization discourse, and the securitization process creates societal acceptance, legitimizing policy change. At the behavioral level, securitization creates measurable transformations in military engagement, defense procurement, and alliance behavior. This model integrates the Neorealist power balance approach developed by Waltz (1979) and Mearsheimer (2001) with the Copenhagen School securitization theory established by Buzan, Wæver, and de Wilde (1998). In the literature, these two paradigms are generally treated as rival approaches. This study proves that both approaches are complementary perspectives and that hybrid strategies encompass both material capacity and discursive legitimization dimensions.

The Turkey case's original contribution to the literature is the operationalization of hybrid and gray zone concepts with measurable indicators. While Hoffman (2007, 2009) defined hybrid warfare at the conceptual level, Mazarr (2015) conceptualized the gray zone as a strategic environment. However, how these concepts should be tested in empirical contexts has not been adequately explained in the literature. This study carries conceptual discussions to the empirical plane by representing threat exposure, hybrid tool usage, and securitization discourse with measurable variables. The systematic use of Armed Conflict Location and Event Data, Global Database of Events Language and Tone, and Stockholm International Peace Research Institute data demonstrates that hybrid strategies can be tracked with quantitative indicators. In the literature, authors such as Galeotti (2016) and Brands and Cooper (2020) discuss hybrid and gray zone strategies at the conceptual level but do not provide operational measurement frameworks (McCulloh & Johnson, 2013; Renz & Smith, 2016). This study presents a methodological framework for future research by combining conceptual discussions with operational indicators.

The findings reveal that Turkey's emphasis on indigenous production in defense procurement combines with asymmetric capabilities. The development of unmanned aerial vehicles with indigenous resources, the indigenization of electronic warfare systems, and the establishment of cyber defense capacity with national capabilities are indicators of the strategy to reduce technological dependency. In the literature, the role of technology transfer in security policy is discussed, but the quest for technological autonomy in the context of hybrid strategies is not sufficiently examined (Fridman, 2018; Chivvis, 2017). Turkey's experience demonstrates that effective response to hybrid threats requires technological autonomy. However, technological autonomy carries the risk of cost

increase and operational effectiveness loss in the short term. In the long term, technological autonomy provides strategic flexibility against external pressures.

The intensification of securitization discourse creates the risk of counter-securitization at the societal level. Roe (2004) demonstrated in the literature that excessive securitization weakens democratic oversight mechanisms and creates societal polarization (Feaver & Lorber, 2017; Bitzinger, 2017). In Turkey's experience, the definition of hybrid threats at an existential level may lead to security policies becoming removed from public debate. Securitization discourse, while facilitating policy change in the short term, carries the risk of erosion of societal consensus in the long term. This finding requires rethinking the normative dimension of securitization theory: is securitization always legitimate, under what conditions should it be limited? This question has not been adequately answered in the literature (Buzan, Wæver & de Wilde, 1998; Balzacq, 2011).

The proliferation of flexible balancing behavior reduces the predictability of the regional security architecture. Turkey's tactical rapprochement and distancing episodes with different actors both create opportunities and generate uncertainty. Walt (1987) argued in the literature that states' threat balancing behavior exhibits predictable patterns (Schweller, 1994: 73-102; Paul, 2004). The Turkey case demonstrates that hybrid strategies intensify flexible balancing behavior and weaken fixed alliance systems. However, excessive flexibility may question long-term strategic credibility. Regional actors' inability to predict Turkey's future behavior may increase cooperation costs. This dynamic requires questioning the limits of flexible balancing.

The study's limitations should be evaluated at five levels. First, open-source databases do not include unreported covert operations. Due to the nature of hybrid strategies having deniability characteristics, some activities do not appear in data sets. Although the process tracing and triangulation strategy partially mitigates this limitation, comprehensive measurement is not possible. Second, dictionary-based text analysis cannot fully capture the contextual differences of securitization discourse. The fact that the same concepts carry different meanings in different political contexts is a limitation of quantitative text analysis. Third, single case analysis restricts the generalizability of findings. Turkey's Middle East experience carries unique contextual conditions: factors such as NATO membership, European Union accession process, search for legitimacy in the Islamic world, and regional power claim make direct transfer of findings to other cases difficult. Fourth, there are numerous intervening variables in the thirty-three-year time span. Although the study attempts to isolate the impact of hybrid strategies, the role of factors such as global financial crises, regional civil wars, and leadership changes cannot be fully controlled. Fifth, the limited accessibility of classified security documents requires some dynamics to be represented with indirect indicators. These limitations require careful interpretation of findings and that future research fill these gaps.

Three directions are recommended for future research. First, comparative case analyses should be expanded. Turkey's experience should be compared with regional powers such as Israel, Iran, and Saudi Arabia to examine how hybrid strategies operate in different political systems (George & Bennett, 2005; Collier, 2011: 823-829). Second, the impact of hybrid strategies at the societal perception level should be measured through surveys and focus group studies. This study measured securitization discourse based on institutional documents, but perception change at the societal level requires separate examination. Third, the long-term effects of hybrid strategies should be monitored. This study covers the 1991-2024 period, but the long-term effects of hybrid strategies on regional stability, state capacity, and societal cohesion have not yet fully emerged. Future research should evaluate these effects with a decadal perspective.

Policy implications should be discussed at three levels. First, merely increasing military capacity against hybrid threats is insufficient. The findings demonstrate that securitization discourse creates societal acceptance. Policymakers should develop transparent communication strategies to strengthen the legitimacy of security policies. Excessive securitization carries the risk of weakening democratic oversight mechanisms in the long term. Therefore, it is critically important that security discourse remains within the boundaries of societal consensus. Second, flexible balancing behavior provides strategic autonomy while creating unpredictability loss. Policymakers should balance tactical flexibility with strategic consistency and strengthen strategic communication to allies. Third, the pursuit of technological autonomy in asymmetric capabilities is a rational choice, but it brings cost increases in the short term. Policymakers should consider indigenous technology development programs as long-term investments and carefully manage the transition process to minimize operational effectiveness loss.

This study has explained how hybrid warfare and gray zone strategies transformed Turkey's Middle East security policy through multi-level causal mechanisms. The findings have proven with concrete indicators the reciprocal interaction among threat exposure, securitization discourse, and policy outputs. The integration of Neorealist power balance with Copenhagen School securitization theory has presented an original theoretical framework explaining both the material and discursive dimensions of hybrid strategies. Turkey's thirty-three-year Middle East experience has added empirical depth to the hybrid and gray zone literature and carried conceptual discussions to the operational plane. The study has established methodological and theoretical foundations for the systematic examination of hybrid strategies in security studies.

Conclusion and Recommendations:

This study has explained how Turkey's Middle East security policy during the 1991-2024 period was transformed by exposure to and usage of hybrid warfare and gray zone strategies through multi-level causal mechanisms. The reciprocal interaction among structural constraints, securitization discourse, and policy outputs throughout the thirty-three-year period has materialized through the confirmation of three hypotheses. A comprehensive answer has been provided to the research question of "through which securitization mechanisms and to what extent the level of exposure to and usage of hybrid warfare and gray zone strategies affect Turkey's Middle East security policy." Findings have demonstrated with measurable indicators that as threat intensity increases, military engagement intensifies; as hybrid tool usage increases, flexible balancing behavior systematizes; and with the intensification of securitization discourse, priority is given to asymmetric capabilities in defense procurement.

The first hypothesis predicted that as hybrid threat exposure increases, cross-border low-visibility military engagement would intensify. Findings strongly supported this hypothesis. Threat intensity, which remained limited to an annual average of one hundred twenty security incidents in the 1991-2002 period, increased to six hundred fifty in the 2016-2024 period. The increase in unmanned aerial vehicle operations from two hundred to one thousand eight hundred, the number of cross-border forward bases reaching fifteen, and the institutionalization of systematic cooperation with local proxy forces are empirical evidence of the logic of responding to threat intensity with material capacity. Mearsheimer's offensive realism approach posits that states pursue relative power maximization. Turkey's Middle East experience confirms this theoretical expectation through asymmetric instruments: the high cost of conventional military power and the risk of possible retaliation have triggered orientation toward low-visibility engagement tools. However, this finding goes beyond mere material capacity increase. The creation of societal acceptance by securitization discourse has provided political legitimacy for military engagement and enabled policy change.

The second hypothesis proposed that as hybrid tool usage increases, regional flexible balancing behavior would intensify. Findings revealed that Turkey significantly increased episodes of tactical rapprochement and distancing in the post-2011 period. The maintenance of energy cooperation with Iran while preserving competition in the security domain, the development of selective cooperation with Russia in Syria while exhibiting opposing positioning in Libya, the expansion of weapon procurement source diversity, and the increased frequency of participation in multilateral exercises are indicators of flexible balancing behavior. Hybrid strategies provide states with the capacity to act independently of fixed alliance systems. The structural complexity of the Middle East and the multi-actor security environment carry the risk that rigid alliance ties limit strategic autonomy; in this context, flexible balancing emerges as a rational choice. However, the long-term cost of this flexibility must be carefully evaluated: unpredictability loss and erosion of alliance confidence bring strategic communication gaps.

The third hypothesis argued that as the securitization of hybrid and gray zone threats increases, budgetary and doctrinal priority would be given to asymmetric capabilities in defense procurement. Findings strongly confirmed this hypothesis. The increase in the budget share allocated to unmanned aerial vehicles, electronic warfare systems, and cyber defense programs from five percent to twenty-two percent demonstrates that securitization discourse has legitimized institutional transformation. The intensification of hybrid threat emphasis in Turkish Grand National Assembly minutes, National Security Council communiqués, and leader speeches has constituted the discursive foundation of this budget allocation. The establishment of the Unmanned Aerial Vehicle Command, creation of the Cyber Security Presidency, and structuring of the Electronic Warfare Department Directorate after 2016 are institutional outputs of the securitization process. The Copenhagen School has shown that the securitization process legitimizes extraordinary measures. The Turkey case concretely reveals that securitization discourse does not remain only at the discursive level but transforms into material resource allocation and institutional structuring.

Cross-period comparison demonstrates that the transformation has been qualitative rather than gradual. The 1991-2002 period is the basic phase where threat exposure is low, securitization discourse is limited, and military engagement is reactive. The 2003-2010 period is a transition phase: the collapse of the regional security architecture following the Iraq invasion increased threat exposure and intensified securitization discourse. The 2011-2015 period is a qualitative transformation phase: the outbreak of the Syrian civil war transformed threat nature into a multi-layered structure and elevated securitization discourse to an existential level. The 2016-2024 period is a maturation phase: hybrid tool usage has become institutional doctrine, flexible balancing behavior has systematized, and asymmetric capabilities have gained priority in defense procurement. This periodization concretely demonstrates how hybrid and gray zone strategies evolved in the Middle East context.

The theoretical contribution of the study becomes evident at three levels. First, the integration of neorealist power balance approach with Copenhagen School securitization theory has provided an original framework explaining both material and discursive dimensions of hybrid strategies. While these two paradigms are generally addressed as competing approaches in the literature, this study has positioned them as complementary perspectives and established a multi-level causal mechanism model. Second, the multi-level model established among threat exposure, securitization process, and policy output has shown how structural constraints transform into policy change through discursive legitimization. Third, the operationalization of hybrid warfare and gray zone concepts with measurable variables and their testing through the Turkey case has proven the applicability of these concepts in regional contexts. The study has established methodological and theoretical ground for the systematic examination of hybrid strategies in security studies.

The empirical contribution of the research is the systematic analysis of Turkey's thirty-three-year Middle East security policy experience through periodization based on hybrid exposure and usage level with measurable variables. While there are studies examining Turkey's Middle East policy in the literature, these studies address cross-border operations, defense industry policies, or regional alliance behaviors separately. This study is the first systematic research integrating these elements within the hybrid paradigm. The systematic use of Armed Conflict Location and Event Data, Global Database of Events Language and Tone, and Stockholm International Peace Research Institute data has demonstrated that hybrid strategies can be tracked with quantitative indicators. The study has provided a methodological framework for future research by combining conceptual discussions with operational indicators.

Policy implications must be discussed at three levels. First, merely increasing military capacity against hybrid threats is not sufficient. Findings show that securitization discourse creates societal acceptance; in this context, policymakers should develop transparent communication strategies to strengthen the legitimacy of security policies. Excessive securitization carries the risk of weakening democratic oversight mechanisms in the long term; therefore, it is critically important that security discourse remains within societal consensus boundaries. Second, flexible balancing behavior provides strategic autonomy while creating unpredictability loss. Policymakers must balance tactical flexibility with strategic consistency and strengthen strategic communication to allies. Third, the pursuit of technological autonomy in asymmetric capabilities is a rational choice but brings cost increases in the short term. Policymakers should evaluate domestic technology development programs as long-term investments and carefully manage the transition process to minimize operational effectiveness loss.

The study's limitations are defined at five levels. First, open-source databases do not include unreported covert operations; this limitation has been partially addressed through process tracing and secondary source triangulation. Second, dictionary-based text analysis does not fully capture qualitative differences in securitization discourse; semantic shifts of the same concepts in different contexts must be considered. Third, single case analysis limits the generalizability of findings; Turkey's Middle East experience carries unique contextual conditions. Fourth, numerous intervening variables exist in the thirty-three-year time span; although the study attempts to isolate the effect of hybrid strategies, the role of other factors is acknowledged. Fifth, limited accessibility to official security policy documents, particularly the inability to access classified information, has required the representation of some dynamics through indirect indicators.

Future research can develop in three directions. First, comparative case analyses should be conducted. Turkey's experience can be compared with Iran's, Saudi Arabia's, and Israel's use of hybrid strategies to provide a more comprehensive analysis of regional dynamics. Second, content analysis of securitization discourse should be deepened; the use of machine learning techniques in discourse analysis can enable more precise tracking of

conceptual shifts and meaning changes. Third, the long-term effects of hybrid strategies should be monitored; this study covers the 1991-2024 period, but the long-term effects of hybrid strategies on regional stability, state capacity, and societal cohesion have not yet fully emerged. Future research should evaluate these effects with a decadal perspective.

In conclusion, this study has explained how hybrid warfare and gray zone strategies transformed Turkey's Middle East security policy through multi-level causal mechanisms. Findings have demonstrated with concrete indicators the reciprocal interaction among threat exposure, securitization discourse, and policy output. The integration of neorealist power balance with Copenhagen School securitization theory has provided an original theoretical framework explaining both material and discursive dimensions of hybrid strategies. Turkey's thirty-three-year Middle East experience has added empirical depth to hybrid and gray zone literature and has brought conceptual discussions to the operational level. The study has established methodological and theoretical ground for the systematic examination of hybrid strategies in security studies and has contributed to future research building upon these foundations.

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