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Alignment of Necessity

Turkey's Role in the Future European Security Architecture

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Russia's full-scale invasion of Ukraine marked the start of a prolonged confrontation between Moscow and Europe – one that is fundamentally reshaping the parameters of European security. The return of Donald Trump to the White House and his stated intent to quickly end the war in Ukraine and put pressure on the European allies including Ukraine to assume greater responsibility for their security is a second critical inflection point. In this rapidly evolving security landscape, Europe faces the dual challenge of ensuring the long-term security of Ukraine, the Baltic states and the Black Sea region and strengthening the European Union's defence and military capabilities. Turkey has a strategically significant, albeit politically contentious role to play within both contexts. What kind of an alignment might there be between the EU and Turkey, given that Ankara is simultaneously a partner, competitor, rival and even threat to EU member states? For its part, the European Union should adopt a gradual, pragmatic and interest driven approach to Turkey's integration into the changing European security architecture. It should aim to reinforce the role of Europe – including Turkey – as a strategic and capable security actor while making clear that enhanced defence cooperation with Ankara and Turkey's stalled EU accession process are two separate issues.

Since the start of Russia's multi-front attack on Ukraine in February 2022, Turkey has been performing a balancing act between its Western allies and Russia in order to hedge its security and economic bets. Ever since Moscow's annexation of Crimea and the occupation of parts of Donbas by two Russian proxy statelets in 2014, Ankara has repeatedly emphasised its commitment to Ukraine's territorial integrity and supported the Ukrainian military through defence exports and co-production. However, it does not consider Russia a primary threat, despite the reference in the June 2025 Hague Summit Declaration of NATO — which Turkey has signed — to "the long-term threat posed by Russia to Euro-Atlantic security". Moreover, like Moscow, the Turkish leadership sees the war in Ukraine as an opportunity to recalibrate the post-Cold War order. Furthermore, Turkey has not participated in Western sanctions against Russia (it argues that, as a matter of principle, it joins only UN sanctions) and

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has been helping Moscow circumvent them, albeit to a much lesser extent since the United States imposed secondary sanctions. Amid all this strategic ambiguity, it is not surprising that initial expectations of Turkey drawing closer to its Western allies following Russia's invasion of Ukraine have not been met.

Enter Trump II: Rapprochement between the EU and Ankara

The current Trump administration's asymmetric stance on the war in Ukraine appears to have created new momentum for enhanced cooperation between Ankara and Brussels. Turkey has attended the meetings of the "coalition of the willing", led by the United Kingdom and France, and expressed readiness to monitor a potential ceasefire in Ukraine. It has also reportedly signalled a willingness to assume responsibility for the maritime dimension of any multinational deployment. Recently, Ankara hosted talks between Russian and Ukrainian delegations in Istanbul, although no concrete progress was made towards agreement on a ceasefire.

As NATO's second-largest army and as the state with the longest coastline on the Black Sea, Turkey plays an important strategic role. Its control over the access of warships to the Black Sea at times of war, as stipulated in the Montreux Convention, further underscores its significance. Turkey's growing defence industry — and, in particular, its competitive edge in ammunition and unmanned aerial vehicles (UAVs) — only increases the country's relevance in EU defence discussions. Since 2010, Turkey's defence and aerospace exports have been steadily increasing: they reached a total of US$7.15 billion in 2024, a 29 per cent increase over the previous year. Though known mainly for its UAV production, the Turkish defence industry has also enjoyed success in domains related to land, maritime and air defence.

The Turkish leadership remains committed to defence investments, despite economic difficulties and technological dependence at the subsystem and component levels. Defence ties with various EU member states and Ukraine continue to intensify. Having recently been identified by both the European Commission and the European Council as a "like-minded" non-EU partner, Turkey, together with the other candidate countries, can now contribute up to 35 per cent of a defence product under the EU's SAFE regulation, a new mechanism designed to strengthen joint defence investments.

Concerns in Brussels: Between EU accession and overreliance on Ankara

Not least because of the geopolitical imperatives of the Trump administration, the Turkish leadership considers itself to be in a favourable position. Convinced that European security is impossible without its engagement, Ankara is not only seeking active involvement in EU defence procurement but is also attempting to use defence cooperation as leverage for EU membership.

This seemingly opportunistic approach to EU accession appears to have struck a raw nerve in Brussels. The European Parliament has cautioned that Turkey's strategic and geopolitical importance does not compensate for the country's ongoing democratic backsliding. In keeping with its normative tradition, the Parliament remains reluctant to regard Turkey as a "like-minded" partner; rather, it is sees Ankara as a strategic partner, a NATO ally and a "country with close but complex ties to the EU in security, trade, economy and migration".

The EU's cautious balancing act towards Turkey's role in the evolving European security architecture is shaped by the latter's ongoing autocratisation, on the one hand, and its weak alignment with the EU's Common Foreign and Security Policy (CFSP), on the other. Turkey has been moving steadily towards an autocratic political system since the late 2000s. On 19 March 2025 — the day on which Ekrem İmamoğlu, the mayor of the Istanbul Metropolitan

Municipality and the most formidable rival of Erdoğan, was arrested — Ankara took another quantum leap in that direction. With the accession negotiations stalled and bilateral relations becoming increasingly transactional, Turkey is aware that the EU lacks normative leverage.

The EU, for its part, is wary of Ankara's strategic aspirations for influence outside its borders, but acknowledges that cooperation with Turkey is inevitable. While Brussels is currently negotiating a defence pact with the UK that includes provisions beyond the 35 per cent baseline for military-industrial projects, it is not pursuing a comparable framework with Ankara. Concerns in Brussels about overreliance on Turkey for defence are far from negligible. At the same time, the EU has yet to articulate a coherent strategic approach for engaging Turkey as a security partner.

Differences among the member states

Establishing such an approach is made difficult by the various attitudes among EU member states towards defence and security cooperation with Turkey. The factors at play here range from different threat prioritisations and diverging ideas about European strategic autonomy to competing military-industrial interests. Perceptions of Ankara's geopolitical ambitions and its foreign policy are another factor, as are member states' bilateral economic ties with Turkey and the size and clout of their Turkish diaspora communities.

To better understand the various attitudes among EU member states towards defence and security cooperation with Turkey in a changing European security environment, the Centre for Applied Turkey Studies (CATS) commissioned nine reports. The findings reveal three broad categories of EU member state based on the level of willingness to cooperate with Turkey:

(i) Those with relatively cooperative and friendly relations with Turkey: Poland, Spain and Italy;
(ii) Those with a more cautious or reserved stance: Sweden, Finland and Germany; and
(iii) Those reluctant to engage with Turkey: France and Greece.

Bilateral cooperation with Turkey: Poland, Spain and Italy

In the case of Poland, Spain and Italy, bilateral relations with Turkey are shaped, above all, by security imperatives and military-industrial interests. Warsaw considers the deepening of ties with Turkey to be in line with its strategic focus on reinforcing NATO's eastern flank in today's volatile security environment. In 2021, Poland became the first EU and NATO country to purchase Turkish Bayraktar TB2 drones. At the same time, the Turkish defence company ASELSAN is supplying the Polish firm AMZ Kutno with reconnaissance and surveillance systems. Above all, Polish decision-makers view defence cooperation with Turkey, which is currently limited to procurement, as a means of driving a wedge between Turkey and Russia and anchoring Turkey firmly within the Western security architecture. According to this view, Ankara is a crucial partner for containing Russia. In fact, in April 2025, Turkey joined the Three Seas Initiative as a strategic partner. The initiative was launched in 2015 by Croatia and Poland in order to strengthen transportation, energy and digital infrastructure links among the 12 EU member states situated around the Baltic, Adriatic and Black Seas.

Like Poland, Spain regards NATO as the main institutional framework for cooperation with Turkey. But unlike Warsaw, Madrid's main interest is in NATO's southern flank. Turkish engagement is seen as strategically crucial to counterbalance the eastern flank-oriented priorities of the central, east and north European allies. From the Spanish perspective, Turkey plays a vital role in the security of the eastern

Mediterranean, while Ankara's "relatively limited engagement in the western Mediterranean, particularly regarding Morocco and Algeria", lowers the risk of bilateral tensions stemming from national sensitivities. Despite the different approaches of the two countries towards Hamas, Madrid's criticism of the Netanyahu government's Gaza policy is positively received in Ankara.

Spain, too, collaborates with Turkey in the area of defence. It has become one of Turkey's top defence suppliers and co-production partners. After signing a memorandum of understanding (MoU) in December 2024 to jointly develop the *Hürjet* advanced trainer aircraft for the Spanish Air Force, Madrid recently announced a €1.375 billion investment. Furthermore, the design of Turkey's drone-capable amphibious assault ship, *TCG Anadolu*, was based on that of the Spanish aircraft carrier *Juan Carlos I*. Madrid's approach to Ankara as a potential partner in defence is part of its broader strategy of expanding external partnerships in order to boost "its defence exports and counterbalance the influence of more dominant European companies and member states".

Like Spain, Italy sees Ankara as a crucial defence partner. In terms of share of arms exports to Turkey, both Spain (34%) and Italy (24%) have recently overtaken Germany (19%) and the US (17%). Italy's defence cooperation with Turkey is strongly motivated by its industrial goals. In March 2025, the Italian company Leonardo and Turkey's Baykar Technologies signed an MoU to establish a joint venture for UAV production — a sector in which Europe remains relatively weak. The partnership offers mutual benefits: access to a rapidly growing UAV market and new export destinations for Italy and deeper integration into the European defence market for Turkey. Baykar's acquisition of Italian aviation firm Piaggio Aerospace in December 2024 underscores this mutually reinforcing dynamic.

Beyond the defence sector, Rome regards Ankara as a potential partner in energy security, the management of migration flows and the provision of security in Africa. But at the same time, the two countries are competing for influence in Libya and the eastern Mediterranean.

Cautious but open for engagement: Sweden, Finland and Germany

The second group of EU member states adopts a more cautious, though relatively open approach towards their relations with Turkey. The NATO accession experiences of Sweden and Finland — in the case of the former, Ankara's foot-dragging, in particular — have overwhelmingly shaped those countries' perceptions of defence cooperation with Turkey. While they tend to regard Ankara as unpredictable, they recognise its strategic importance within NATO owing to its geographical location and military capabilities. The feeling that Turkey is "too important to lose, too unreliable to prioritise" encapsulates the pragmatic, if somewhat ambivalent engagement of these two countries with Ankara.

Germany has a similar outlook. However, its relations with Turkey are characterised, above all, by deeper diplomatic, economic and societal ties. As the EU member with the largest Turkish diaspora, Germany has a complex relationship with Turkey — one that is shaped by the friction between the cautious attitude of business, political and security elites towards continued cooperation, on the one hand, and growing public criticism not only of issues related to human rights and the rule of law in Turkey but also of armament in general, on the other.

In recent years, there has been a noticeable — albeit slow and wary — shift in Berlin's policy towards Ankara. Germany increasingly views Turkey through a pragmatic lens, based on three key factors: i) the geopolitical urgency triggered by the Russian invasion of Ukraine and reinforced by the erratic stance of the Trump administration on European security; ii) the re-election of President Erdoğan and his ruling alliance (in 2023); and iii) Turkey's military and strategic importance.

Germany's recent approval of arms exports for the Turkish Navy is driven by this evolving state of affairs. The move follows the lifting of an embargo initially imposed by Germany and other EU member states after Turkey's military incursion into northern Syria in 2019. Moreover, Berlin recently withdrew its veto on the delivery of Eurofighters to Turkey. There are three underlying motivations for this policy shift: i) containing Russian influence in the Black Sea; ii) keeping Turkey close to the West; and iii) preventing a complete rupture in defence cooperation with Turkey.

Reluctant to cooperate: France and Greece

Like the second group of countries, France and Greece have low political confidence in Turkey. Paris increasingly sees Ankara as a "strategic competitor", while Athens' threat perception of Turkey is high. Owing to numerous tensions between France and Turkey during the past decade — including over Syria, the eastern Mediterranean, Turkey's diaspora policy and the ongoing authoritarian trend in Turkey — ties between the two countries have steadily soured. From 2013 to 2022, Turkey ranked just 30th among the top buyers of French arms exports. Since the Turkish military incursion into northern Syria in 2019, France has approved export licences on a case-by-case basis and no longer allows the sale of weapon systems.

Even though bilateral relations seem to have entered a new phase of dialogue — amid efforts to reorganise the European security architecture and amid the changing regional dynamics in the Middle East — it remains unclear whether the recent tentative rapprochement between Paris and Ankara will lead to a sustainable shift in the French perception about security and defence engagement with Turkey: that is, a shift from "possible confrontation" back to "active cooperation".

Two factors are important here. The first has to do with the strategic competition between France and Turkey and French perceptions of that competition. Paris views Ankara as unreliable and ambivalent owing to that latter's balancing act between Moscow and its Western allies and its purchase of the S-400 air defence system from Russia. At the same time, it believes that the Islamic resurgence in France, which it sees as destabilising and polarising factor, has been driven by Turkish Muslim organisations. Moreover, France and Turkey harbour competing geopolitical ambitions: they both have long-term visions of developing security and political ties with countries in Africa and the Middle East and reaping the economic benefits. For its part, Ankara instrumentalises colonial grievances as part of its aspirations to gain and expand its influence. And it is suspicious of Paris's close relations with Greece (and the UAE).

The second main factor shaping French perceptions about security and defence cooperation with Turkey is the emphasis that Paris puts on European strategic autonomy and — in connection with this — its tendency to prioritise European industries. France's initial objection to a Czech-led initiative in 2024 to procure ammunition from third countries and its advocacy against "opening EU funds to foreign companies manufacturing their equipment in Europe — especially missiles — or to companies that do not have the right to alter products according to specific needs, or whose products come with restrictions of use" reflect that stance. In 2024, France, together with the Republic of Cyprus and Greece, blocked the financing of the supply of Turkish UAVs and artillery shells to Ukraine.

For its part, Greece is another member state reluctant to engage with Turkey in defence. Athens and Ankara view each other as historical foes and have been embroiled in numerous unresolved disputes over the status of islands in the Aegean Sea, airspace-related issues and maritime boundaries in both the Aegean and Mediterranean. The two countries also differ over how to settle those disputes. Furthermore, Ankara's veiled threats against Greece over the latter's alleged militarisation of the Aegean islands

remain a source of concern in Athens. In 1995, the Turkish parliament gave the government the green light to declare *casus belli* (cause for war) in the event of Greece unilaterally expanding its territorial waters in the Aegean Sea beyond six nautical miles. For its part, Athens demands that Ankara's participation in EU defence programmes should be conditional upon Turkey's lifting of its war threat.

In 2021, following what had been the longest military face-off in the region since the 1970s, Athens and Ankara resumed exploratory talks. Although NATO and the US have played a crucial role in easing tensions between Athens and Ankara in the past, the heightened frictions between Washington and Ankara over the past ten years and the growing strategic cooperation between the US and Greece (along with the Republic of Cyprus), which started under the first Trump administration and accelerated under Biden, cast doubt on Washington's ability to act as a mediator today. Thus, NATO's significance as a platform for deconfliction between Athens and Ankara will be crucial going forward.

EU's long-term structural alignment with Turkey: Bilateral versus gradual approach

Based on the different attitudes among the EU member states towards security and defence engagement with Turkey, it would seem likely that the bilateral approach — whereby individual member states invest in Turkish projects or engage in co-production to export to third countries — will continue to characterise relations with Ankara for the foreseeable future. This is mainly because of the weakening of mutual trust between Brussels and Ankara and the lack of political will among the member states for an institutionalised and multinational engagement with Turkey at the EU level. Even Spain and Italy — which, as noted above, maintain friendly and cooperative ties with Ankara — do not view Turkey as a priority partner and remain cautious about advocating Turkey's enhanced integration into European defence structures and mechanisms, especially if such advocacy will antagonise fellow member states.

However, the bilateral approach towards engagement with Ankara poses three potential risks for the EU in the medium to long term. First, mutual trust between Brussels and Ankara could weaken further. Second, if Turkey is not invited to participating in European multinational programmes, it might seek alternative partners elsewhere and could even consider nuclear armament. Third, the bilateral approach could slow down European efforts to standardise, scale up and harmonise defence industries at the EU level.

In order to minimise these risks and take into account what appears to be the EU Council's desire to engage in defence cooperation with Turkey, the EU should adopt a step-by-step and interest driven approach to facilitate long-term structural alignment with Turkey. This approach should prioritise maintaining the EU's internal coherence, providing for the security of Ukraine and the Black Sea (and Baltic states) and strengthening NATO's southern flank. Amid the current geopolitical fragmentation, enhanced alignment between European and Turkish interests can be expected due to the three imperatives of i) securing the Black Sea region, ii) cementing the NATO alliance and iii) stabilising the shared southern neighbourhood.

Securing the Black Sea region

US President Donald Trump's indirect empowerment of Moscow — albeit his noticeably harsher rhetoric lately — is unlikely to be viewed favourably in Ankara. Turkish policy in the Black Sea since the end of the Cold War has been to maintain a balance of power vis-à-vis Russia while avoiding direct confrontation with Moscow. Neither a strong nor a weak Russia is in Ankara's interests. Turkey now faces the possibility of a militarily and geopolitically strengthened Russia that could be tempted to regain lost ground in North Africa, the Caucasus

and the Middle East at Ankara's expense. Such a scenario is not in the interests of the EU — nor, indeed, of Ukraine. For its part, Kyiv views Turkey as a key player in securing and stabilising the Black Sea region.

Cementing the NATO alliance

Trump's policy of calling into question NATO and Washington's security guarantees for Europe and Ukraine is viewed by Ankara as both providing an opportunity and posing a risk. As noted above, the Turkish leadership firmly believes that Turkish involvement in European security is not an option but a necessity. But Ankara not only wants to be involved; it also wants to actively shape the future of European security. NATO plays a central role in Turkey's security identity. While NATO membership has enabled Turkey to perform its balancing act between Russia and its Western allies, Turkey's security elites perceive it as the key guarantor of the country's own security. Thus, Ankara has high stakes in NATO continuing to serve as the main framework not just for European security but also for its own. (Indeed, a majority of the EU member states, like Ukraine, regard NATO as the central pillar of Europe's collective security, too.)

Conversely, Turkey, which consistently participates in NATO missions, is crucial for the alliance. In June 2022, for example, Turkey assumed the command of NATO's Very High Readiness Joint Task Force; and in January 2024, it signed an agreement with Romania and Bulgaria to clear floating mines in the Black Sea. In addition, Turkey conducts round-the-clock air and naval reconnaissance missions in the Black Sea and provides up to 67 per cent of all situational awareness information to NATO and Ukraine.

Stabilising the shared southern neighbourhood

Because of Trump's ambivalence regarding Washington's commitment to European security, his interventionist approach in the Middle East (Gaza and Iran) and the potential strengthening of Russia, Ankara now faces what could be two revanchist great powers in its neighbourhood. It is likely that in this situation and with its threat perceptions heightened, Turkey will view Europe as a stabilising force and a source of predictability in today's uncertain and inflammable international environment. Just as Ankara will gain in relevance for Brussels in defence and security policy, so the EU will feature more prominently in Turkish calculations.

Conclusions for the EU

Turkey and the EU stand at the crossroads of necessity amid the ongoing reframing of Europe's defence and security future. There are three broad areas on which the EU should focus as it pursues a step-by-step approach to integrating Turkey into its defence and security initiatives, programmes and mechanisms.

First, it should progressively expand economic, security and defence cooperation with Turkey in order to strengthen the role of Europe — including Turkey — as a strategic security actor. To this end, the European Council, together with the European Commission, should create the necessary conditions for substantive defence engagement with Turkey by ensuring that all member states lift official and unofficial arms embargos on Turkey. In parallel, the European Council should reinforce the mutual defence clause to reduce the risk that a militarily strengthened Turkey could act against EU member states — particularly Greece and the Republic of Cyprus — in the eastern Mediterranean. Furthermore, a permanent bilateral mechanism for deconfliction between Greece and Turkey should be institutionalised within NATO's European pillar to manage tensions and prevent escalation.

Second, the European Council should reassure the European Parliament that defence and security cooperation with Turkey will be treated as a separate issue

from the country's EU accession process. This would help i) overcome likely resistance from the European Parliament to deeper cooperation with Ankara, ii) safeguard the integrity of the accession process and its normative conditionality and iii) preserve what little remains of the EU's leverage over Turkey.

Third, arms export governance should be strictly applied to ensure that weapons co-produced with Turkey do not undermine the EU's security interests and norms. Specifically, this would mean that i) arms sales to non-EU and non-NATO states would require the approval of all production partners, ii) co-produced weapons must not be transferred to actors that the EU designates as systemic rivals or military threats and iii) clear safeguards should be maintained to prevent uncontrolled weapons proliferation.

Such a framework would enable Turkey's gradual participation in existing and future EU defence initiatives and programmes. Because that in itself is likely to fall short of Turkey's initial expectations, the issue of how to conduct diplomacy will still be of utmost importance. In this context, the EU should restart its high-level political dialogue meetings with Turkey, which have not been convened since November 2018. As cooperation deepens and alignment increases, the EU could also consider negotiating a tailored defence pact with Turkey — one that reflects the level of strategic convergence achieved to date.

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