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EVALUATION NOTE

TÜRKİYE'S ROLE IN THE CHANGING EUROPEAN DEFENSE ARCHITECTURE

Recently, significant shifts in the European security architecture have placed Türkiye at the center of discussions regarding the continent's evolving security dynamics. The ongoing war in Ukraine has reshaped regional threat perceptions, compelling European nations to reassess their defense policies and strategic dependencies. This reassessment has gained further urgency with the re-election of former U.S. President Donald Trump, whose previous tenure was marked by calls for European nations to increase their defense spending and reduce their reliance on the United States for security guarantees. Given these developments, European states are now exploring alternative security arrangements, reinforcing their defense capabilities, and seeking to diversify their strategic partnerships.

Türkiye's Growing Diplomatic Engagements

Türkiye's geographic location has always been central to its security role. Positioned at the intersection of Europe, the Middle East, and Asia, it acts as a bridge between regions while also serving as a frontline defense for NATO. This is particularly relevant as European security concerns have shifted in the wake of Russia's war in Ukraine. Since the onset of the Ukraine war, Türkiye has positioned itself as a mediator, maintaining dialogue with both Kyiv and Moscow. Its involvement in facilitating prisoner exchanges and negotiating the Black Sea Grain Initiative highlights Ankara's effectiveness as a diplomatic intermediary. Recent statements by Foreign Minister Hakan Fidan and President Erdoğan reaffirm Türkiye's readiness to host negotiations between Ukraine and Russia, underscoring its support for Ukraine's territorial integrity. This balanced approach enhances Türkiye's standing as a stabilizing force in European security.

¹ <https://www.tepav.org.tr/en/ekibimiz/s/1472>

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Not only in the context of the Ukraine-Russia war, but also in the context of the emerging EU security architecture, Türkiye seems to be increasingly positioning itself as a critical actor in the European security architecture. The meeting between President Erdoğan and Polish Prime Minister Donald Tusk, who currently holds the Presidency of the Council of the European Union, along with statements from the Netherlands advocating for Türkiye's inclusion in European security discussions, have further intensified debates on Ankara's role in this domain. Türkiye's invitation to the EU leaders' summit can be interpreted as a reflection of Europe's efforts to expand partnership mechanisms in security policies. During his visit, President Tusk said that, he brought a "clear proposal for Türkiye to take on the greatest possible co-responsibility" for peace in Ukraine and regional stability. Also, in his remarks on Türkiye's EU accession process, President Tusk stated that, he hopes this process will finally become "realistic and tangible," signaling a potential new phase in Türkiye-EU relations.

Europe vs. President Trump

Following President Donald Trump's second term, EU-U.S. security relations have experienced significant strain, prompting Europe to reassess its defense posture. Trump's expressed skepticism over NATO's collective defense principle, suggesting a potential reevaluation of U.S. commitments if other members do not increase their defense spending, has raised concerns among European allies. French President Emmanuel Macron's 2019 assertion that NATO was experiencing "brain death" has gained renewed relevance, highlighting the need for a more autonomous European defense strategy. In response, the European Union has initiated measures to bolster its defense autonomy, including the appointment of Lithuania's Andrius Kubilius as the first European Commissioner for Defense and Space. This new role is designed to enhance European military manufacturing capacity in the face of external threats. Recently, European Commission President Ursula von der Leyen unveiled the "ReArm Europe" initiative, proposing up to €800 billion to strengthen Europe's defense infrastructure. These developments underscore a pivotal moment in transatlantic relations, as Europe seeks to fortify its security architecture amidst evolving U.S. foreign policy dynamics.

Moreover, in recent years, European states have increased their practical efforts to increase their own defense capacities by reducing their dependence on the United States. Initiatives such as the European Defense Industry Strategy (EDIS) in March 2024 and the Permanent Structured Cooperation (PESCO) in 2017 were developed to strengthen Europe's security independence. However, Türkiye has been systematically excluded from these frameworks, largely due to political disputes with Greece and Cyprus.

Türkiye's Strength in Defence

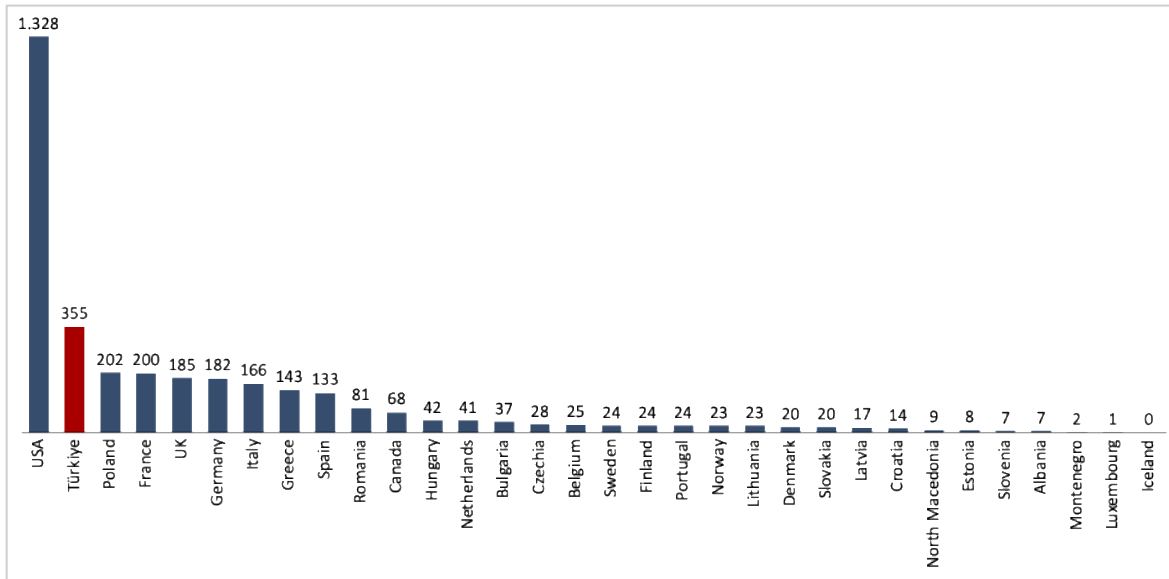
Over the past two decades, Türkiye has invested heavily in developing its own military technology, reducing dependence on foreign suppliers. Its defense industry has become one of the fastest growing in the world, producing advanced military equipment such as drones, warships, and armored vehicles. The Bayraktar TB2 drone has gained international recognition for its effectiveness in conflicts in Ukraine, Libya, and Nagorno-Karabakh.

Türkiye has also made strides in naval and aerospace technology, launching the TCG Anadolu, its first amphibious assault ship, and working on the KAAN fifth-generation fighter jet. These advancements have positioned Türkiye as a rising power in global arms production. However, despite these developments, Türkiye remains reliant on Western technology for key components in its defense projects.

Not only in the defense industry but also in terms of military power, Türkiye stands out among NATO countries. Türkiye became a member of NATO in 1952, during the early years of the Cold War. Its accession was driven by both security concerns and geopolitical strategy, as Turkey sought protection against Soviet expansionism while NATO aimed to strengthen its southeastern flank. Since joining, Türkiye has actively participated in numerous NATO missions, reflecting its commitment to collective security. During the Korean War, even before officially joining NATO, Türkiye deployed troops under the UN Command, showcasing its reliability as an ally. Later, Türkiye contributed to peacekeeping efforts in Bosnia and Kosovo during the 1990s under NATO-led operations. In Afghanistan, Turkey played a crucial role in ISAF (International Security Assistance Force) from 2001 to 2014 and later in Resolute Support Mission until 2021, focusing on training Afghan forces. Additionally, Turkey participated in NATO's Libya intervention in 2011 and has been involved in various maritime security operations, such as Operation Sea Guardian. Türkiye's contributions highlight its strategic importance within the alliance, balancing regional security concerns with NATO's broader objectives.

Another point is, Türkiye holds the second-largest share of active military personnel in NATO in 2025, contributing 10.3%—nearly double that of Poland (5.9%), France (5.8%), UK (5.4%) and Germany (5.3%). Only the U.S., with 38.6%, surpasses it significantly.

Graph 1. Estimated number of active military personnel in NATO in 2025, thousand, by member state



Source: Global Firepower, TEPAV visualizations

Challenges and Opportunities for Türkiye's Future in European Defense

While Türkiye's strategic importance is increasingly recognized in European security discussions, deep-seated political and trust issues continue to hinder full-scale integration. Türkiye's NATO membership, defense industry advancements, and diplomatic initiatives make it a valuable security partner, yet lingering tensions—ranging from democratic backsliding concerns, unpredictable foreign policy (until recently) to unresolved disputes with Greece and Cyprus—complicate its path toward institutionalized defense cooperation with the EU.

Trump's return to the White House further adds to the unpredictability of Türkiye's position within Europe's security framework. If the U.S. reduces its security commitments to NATO and Ukraine, European countries may be compelled to forge stronger defense ties with Türkiye, regardless of ongoing political disputes. However, if security cooperation remains limited to a transactional relationship rather than evolving into a deeper strategic alignment, Türkiye's role in European security may continue to be defined by short-term partnerships rather than long-term integration.

For instance, The United Kingdom (UK), despite its exit from the EU, has maintained a strong presence in European security through bilateral defense agreements and partnerships with key European states. In a similar way, Türkiye could position itself as a crucial security partner for the EU despite the longstanding challenges in Türkiye-EU relations. The war in Ukraine and growing geopolitical uncertainties have created a security landscape where non-EU countries like the UK and Türkiye are increasingly relevant. Both the UK and Türkiye applied to participate in PESCO, with the UK's application being accepted in 2021, while Türkiye's was rejected due to political and strategic obstacles. While the UK is seen as a natural partner, Türkiye continues to face challenges, including EU member-state vetoes on its participation in initiatives like PESCO and defense-related procurement. In response, Türkiye has shifted its strategy toward bilateral security and defense partnerships, particularly with the UK, Spain, and Italy as a way to bypass institutional barriers. This transactional approach, while not ensuring full integration into Europe's autonomous defense framework, could still allow Türkiye to play a role akin to the UK - as an independent but indispensable defense partner for European security in the near future.

Last but not least, Türkiye's rapprochement with the EU creates a delicate balance in its relations with Russia, a key economic and geopolitical partner. While Türkiye stands on the threshold of deeper security cooperation with Europe, its economic ties with Russia, especially in the energy sector, present significant constraints. Notably, Russia is Türkiye's largest supplier of natural gas, accounting for approximately 40% of its imports. Additionally, the two nations collaborate extensively in nuclear energy, exemplified by the construction of the Akkuyu Nuclear Power Plant. Given these substantial energy dependencies, Türkiye is likely to maintain a balanced relationship with Russia while advancing its strategic interests with Europe.

Ultimately, the nature of Türkiye-EU relations will depend on whether both sides can overcome their mutual distrust and establish a more institutionalized framework for cooperation. If security becomes an avenue for rebuilding political ties and fostering greater trust, it could pave the way for a renewed discussion on Türkiye's EU accession process. Conversely, if tensions persist and cooperation remains transactional, security may become just another area

where Türkiye and the EU engage selectively, without resolving their broader political disagreements.