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## Introduction

The European security architecture has continuously evolved in the post-Cold War era. The recent White House meeting with Zelensky shows that the United States' redefinition of its global strategic priorities and the resulting fluctuations in transatlantic relations have made Europe's imperative to develop its own security capabilities more visible. The adoption of isolationist policies by the Trump administration brings to the fore the necessity for Europe to substantially autonomise its security strategies, rapidly increase its military capacity within NATO and turn towards reliable regional partnerships (Cook and Casert, 2025).

Regional insecurity, especially in the aftermath of Russia's invasion of Ukraine, has forced the European Union to rethink their traditional security partnerships. In the event of a prolongation of the current war or a settlement favourable to Russia, European defence reflexes will sharpen further, requiring more spending. In this context the rise of Türkiye's military and defence industry has emerged as an alternative and strategic partnership option for Europe (Dalay, 2025). Türkiye's advanced military technologies such as unmanned aerial vehicles (UAV), armoured vehicles and naval projects have the potential to enhance Europe's defence capabilities. Türkiye, with its geographical location and military-industrial capacity is in a position to serve as an example and force multiplier in Europe's defence strategy.

This paper analyses the rise of the Turkish defence industry and more importantly Türkiye's increasing role as a regional security partner for Europe, assessing the role Türkiye can play in European security strategy by focusing on its military-industrial capacity and defence policies, based on strategic autonomy. The first part of the study will discuss the transformation of Europe's security relations with the US and what role Türkiye can play in this vacuum. In the second part, developments in Türkiye's defence industry, domestic production capacity and self-sufficiency level will be analysed in detail. In the third part, the current and potential models of cooperation between the Turkish and European militaries will be evaluated along with the political and military implications of such cooperation.

### **1. Europe's Dependence on the United States and the Search for Strategic Autonomy: Türkiye as a Role Model**

The post-Cold War European security architecture has been heavily dependent on the military power of the United States and its leadership within NATO (Transatlantic Task Force, 2025). This dependence has been the mainstay of the transatlantic alliance, with EU countries focusing on economic development rather than sharing the security burden by allocating extensive defence budgets. Over the last decade, this equation has rapidly

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changed. The shift in US foreign policy priorities towards the Asia-Pacific region and the isolationist discourses of the current US administration have created a perception of a serious security vacuum in Europe (Sabbagh, 2025)

Both Trump presidencies have rang alarm bells in Europe and accelerated the debate for strategic autonomy of the EU, through actions such as his lamentation of the state of NATO and European defence spending and his declaration that “Ukraine is no longer a US issue”, cutting all military aid to the country (Reuters; 2017, Cook & Casert, 2025; Loss, 2025). The European Commission's Strategic Compass for Security and Defence clearly states the EU's goal of developing its own defence capabilities and ‘taking care of its own’ (European External Action Service, 2022). However, this strategic vision is far from creating realistic and operational defence capability in the short-term.

While some member states have increased their military expenditures in recent years, differing threat perceptions and imbalances in defence expenditures among EU countries make it difficult to build a common military capacity and adequate military force projection for collective defence (Cook & Casert, 2025; Scazzieri, 2025). This shortcoming is viewed as especially problematic by Poland and the Baltic states on the EU's eastern flank, where the threat perception is highest (Brzozowski, 2024). In such an environment, the search for bilateral and regional co-operation outside of or complementary to NATO becomes more important. In this context, Türkiye is considered neither entirely as an element of the Western bloc nor directly as an alternative power centre (Coppolecchia, 2024).

Regardless of this status, Türkiye is increasingly recognised as a ‘critical partner’ in the EU's security architecture, given the sheer size of its military and geopolitical position. Türkiye posits a particularly interesting partner as it can maintain its identity as a member of NATO while acting as a ‘security buffer’ on the eastern flank of Europe, due to its autonomous capacity in the defence industry, its geopolitical position and its capacity for direct military engagement (Ash, 2025). Military cooperation with eastern border countries such as Poland and Romania reinforce Türkiye's role as a complementary partner to the EU's security strategy (TVP World, 2024). Moreover, Türkiye's growing influence in defence industry exports, for example in the sale of Bayraktar TB2 unmanned aerial vehicles to Poland, has increased European military dependence on Türkiye within wider modernisation strategy (Ozberk, 2024). Türkiye is therefore uniquely positioned as a partner that can fill critical operational capability gaps, if not a full security alternative for a Europe seeking strategic autonomy (Waldwyn, 2024).

However, there are political risks and questions over the long-term sustainability of military co-operation with Türkiye. From the EU perspective, criticism of Türkiye's societal dynamics

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and diplomatic ambiguity make it difficult to deepen cooperation at the institutional level (Michalski 2024). While the current security environment does to some extent override normative concerns, a strategic alliance with Türkiye remains a double-edged sword. With the added context of the nation already achieving cost-efficient self-reliance in defence, the subject of the following section, it can be argued that European-Turkish military rapprochement is a rational and inevitable strategic choice for a continent striving for security (Dalay, 2025).

## **2. The Rise of Türkiye's Military-Industrial Complex and Self-Sufficiency**

The transformation of Türkiye's military-industrial complex over the last two decades points to a process of evolution that is not only quantitative but also qualitative. The Turkish defence industry, which was largely foreign-dependent in the early 2000s, has now moved closer to self-sufficiency, achieving international competitiveness in certain segments (Sidhu, 2024). This section looks at the progress achieved in national defence strategy and operational examples.

Türkiye's defence exports have increased by 69% in the last five years (SIPRI, 2023). In the same period, the domestic contribution rate to the defence industry increased from 20% to 80% (Licini, 2024). This transformation has accelerated with the development of globally competitive product portfolios by domestic companies such as Aselsan, Roketsan, Havelsan and Baykar (Egeli et al., 2024). Aselsan has significantly reduced Türkiye's dependence on foreign countries in electronic warfare systems, radar technologies, communication and command and control infrastructures (Görgün, 2022). Roketsan has improved the precision strike capabilities of the Turkish Armed Forces (TAF) with its short- and medium-range missile systems, while also gaining a foothold in the global market with missile exports for land and naval platforms (Army Recognition, 2025). As for ground forces, Türkiye remains the biggest army in Europe with 355,200 active personnel and an additional 150,000 paramilitary forces (Warpower, n.d).

However, one of the most remarkable actors in Türkiye's military-industrial complex has been Baykar Technologies due to the company's role in regional conflicts. Baykar played a decisive role in the Azerbaijani army's superiority over Armenian forces during the 2020 Nagorno-Karabakh War. In particular, Bayraktar TB2 unmanned aerial vehicles attracted attention as low-cost but highly effective platforms, with precision strikes against fixed and moving targets being one of the factors that changed the course of the Second Karabakh War (Moriyasu & Tavsan, 2023). The same systems were previously used in northern Syria, notably in Operation Spring Shield in 2020, with high success rates against the Assad regime's armoured elements and air defence systems (Kasapoglu, 2020). The MAM-L and

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MAM-T ammunition developed by Roketsan played a critical role in high-precision attacks during this process (Reynolds & Watling, 2020). These operations have demonstrated the effectiveness of Turkish UAV technology not only in asymmetric warfare environments, but also in conventional theatres of conflict where Europe lacks first-hand experience (Reynolds & Watling, 2020).

Türkiye's drone technologies have emerged as an important force multiplier not only in Karabakh and Syria, but also in the Ukraine-Russia war. Bayraktar TB2 unmanned aerial vehicles, which were actively used by the Ukrainian Armed Forces in the early stages of the war in 2022, affected the course of the war with their precision attacks on Russian armoured convoys and logistics lines, putting pressure on the Russian army both militarily and psychologically (Franke, 2025). In the second year of the war, when TB2s used by the Ukrainian Armed Forces were limited to areas with high electronic warfare capabilities, more advanced platforms and software upgrades developed by Baykar were integrated into the battlefield. Furthermore, Baykar announced its facilities' extension to Kyiv, showing the first signs of Turkish-European industrial engagement with greater security implications (Cook, 2023).

By 2025, the dynamics in the Syrian arena once again demonstrated the effectiveness of Turkish technology. Ongoing low-intensity conflicts entered a new phase in this period, with Turkish-backed SNA (Syrian National Forces) successfully led the Manbij offensive (Toksabay & Spencer, 2024). Air superiority provided by Bayraktar TB2 and Akıncı UAVs facilitated the advance of the ground elements, and the Assad regime's armoured units and command and control centres were systematically targeted (Intelligence Online, 2024). These political developments show that Türkiye's national defence industry projects also have an impact in the geopolitical arena, thus acting as a role model for European investment in defence and a potential partner for regional security.

### **3. Ongoing Projects in the Turkish Defence Sector**

Türkiye's self-sufficiency strategy in the defence industry has not only been limited to production and technology development but has also been strengthened through international cooperation and export. In particular, the cooperation agreement signed by Baykar with the Italian company Leonardo in 2025 is an important step in Türkiye's integration into the European defence industry network. This agreement covers both joint development projects in electronic systems and joint market share strategies of UAV technologies (Leonardo, 2025). Türkiye is also expecting to deliver Bayraktar drones to Croatia and Kirpi II/Cobra II armoured vehicles to Romania and Bosnia-Herzegovina, expanding its military footprint in the Balkans (Waldwyn, 2025).

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These advancements are visible in the air, the ANKA and AKSUNGUR UAVs developed by TAI (Turkish Aerospace Industries) have found effective use in long-range reconnaissance and attack missions, increasing Türkiye's influence in the UAV sector (Ozberk, 2022). TAI is also expecting to roll out the upgraded version ANKA-3 alongside the training aircrafts HÜRKUŞ-2 (Hoyle, 2025; Kokcu, 2025). The National Combat Aircraft (NCA) KAAN project, developed by TAI, aims to place Türkiye among a limited number of actors in the fifth-generation fighter jet segment and is considered as another important component of technological autonomy strategy (Ozberk, 2024). At the same time, Baykar is developing the unmanned combat aerial vehicle (UCAV) as part of Project MIUS (Airforce Technology, 2024).[1]

The naval domain also provides concrete results. Savunma Teknolojileri Mühendislik (STM) has expanded Türkiye's domestic production capabilities in the field of naval forces through its corvette and submarine projects, with the Ada-class corvettes developed as part of the MİLGEM project contributing to Türkiye's export capacity (Defence Industry Europe, 2023; Nugent, 2023). One of the projects at the centre of this transformation is the TCG Anadolu. Inspired by the design of Spain's Juan Carlos I class amphibious assault ship (LHD), TCG Anadolu was developed jointly by Sedef Shipyard and the Spanish company Navantia, joining the Turkish Naval Forces inventory in 2023 (TurDef, 2023). TCG Anadolu is not only an amphibious assault ship but also the world's first 'drone carrier' capable of carrying unmanned aerial vehicles (Mizokami, 2023). This feature increases Türkiye's long-range reconnaissance and strike capacity in the Mediterranean, Aegean and Black Seas, and strengthens the concrete military foundations of the 'Blue Homeland' doctrine (TurDef, 2025).

The TCG PİRİREİS submarine is the first platform developed within the scope of Türkiye's New Type Submarine Project (NTSP) and was produced in cooperation with German ThyssenKrupp Marine Systems (TKMS) (Moyeuvre, 2024). However, the local contribution rate of Turkish companies to the project also shows that the submarine depends on Türkiye's own engineering infrastructure (Aslan & Öncel, 2024). PİRİREİS and the following submarines have Air-Independent Propulsion (AIP) technology and offer long-term operational capability in shallow and deep waters (Moyeuvre, 2024). These platforms increase Türkiye's strategic submarine deterrence in the Mediterranean and Aegean Seas, while also increasing its effectiveness in NATO's submarine fleet.

One of Türkiye's most ambitious naval platform projects is the National Aircraft Carrier (MUGEM) project, which is in the planning and design phase (Miltarnyi, 2024). MUGEM is planned to be a full-size aircraft carrier capable of carrying both manned combat aircraft and

[1] In Turkish: Muharip İnsansız Uçak Sistemi and in English: Combatant Unmanned Aircraft System

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unmanned aerial platforms. The project is considered to have the potential to carry Türkiye's regional power projection to transoceanic levels. Last but not least, land forces are also part of this nationalising project. Fourth generation ALTAY battle tanks, as part of The National Tank Production Project[2], are expected to start production in 2025 (Calkaya & Avcioglu, 2025). The current M60T tanks are also undergoing a modernisation process (Army Recognition, 2024). Ground forces are further expected to be reinforced with armoured ground vehicles such as ALPAR and ARMA II (Kasapoğlu & Özkaraşahin, 2024; Otokar, 2024).

Türkiye's military-industrial transformation is progressing in line with its goals of minimising external dependence and gaining flexibility in defence capacity. However, complete national autonomy is unfeasible, as many projects still require external knowledge or components to be imported in the first batches (Egeli et al., 2024). Moreover, Turkish defence companies primarily target the Gulf countries within stability in the MENA (Middle East North Africa) region, especially in the Levant, diverting Türkiye's military focus away from Europe (Besenyó & Málnássy, 2022). Nonetheless, the Turkish Government acknowledges the growing necessity of Turkish defensive capabilities for European security, thus the initiative to extend and improve European defence remains (Aktan, 2025).

#### **4. European-Turkish Military Cooperation: Opportunities, Deepening Patterns and Strategic Risks**

With the increased threat of Russian aggression towards Europe, Türkiye has become an increasingly critical actor in the European security architecture. The deepening of this partnership offers both opportunities and risks. The first step in furthering military cooperation between Europe and Türkiye is to increase the number of existing joint projects between both defence industries. The Baykar-Leonardo agreement in particular is a clear model for this cooperation. Joint R&D projects will not only increase the pace of Türkiye's technological development but also enable European countries to benefit from low-cost and effective solutions (Ash, 2025). Türkiye's field experience and UAV technology could be further disseminated to EU countries under the NATO umbrella through joint exercises and capacity building programmes (Türkgenç, 2025).

Aligning existing naval platform cooperation with Spain with EU defence industry PESCO (Permanent Structured Cooperation) projects would further enhance Türkiye's contribution to European strategic autonomy (Ülgen et al., 2024). Türkiye's naval vessel capacity makes an important contribution to NATO's southern flank, necessitating cooperation with Europe on critical missions such as energy security in the Mediterranean and the protection of

[2] In Turkish: MİTÜP – Milli Tank Üretimi Projesi

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maritime trade routes. Türkiye's power sphere in the Black Sea and Mediterranean region remains crucial for European bilateral cooperation, as Ankara finds itself at unease with Russian naval expansion towards Crimea (Isachenko & Kaymak, 2024).

Although this might seem a strategic move, challenges persist. For the EU, public and political opposition to Türkiye are factors that prevent rapprochement from advancing at the institutional level. Tensions with Greece and Cyprus make political consensus among EU members difficult (Coşkun, 2025). For Türkiye, its role in NATO is integral, while as for the EU an emphasis on normative power and shared values excludes Ankara under its current ideological position (Coşkun, 2024). But both actors now have something to trade. Türkiye can leverage arms exports and a failed negotiator role as tried in 2022 and 2024, whereas the EU can guarantee a strategic ally against Russia or at least secure weapon transfers to Ukraine (Pierini, 2025).

## **Conclusion**

This paper discussed the growing role of Türkiye's rising defence sector in European security context. Turkish Armed Forces remain a crucial regional actor and a growing powerhouse in European security, considering the ongoing growth of the defence sector. However, political challenges are to be considered before drawing conclusions. An important factor is the tendency for Türkiye's foreign policy axis to assert independence from the West. Internally, the political instability and ongoing social unrest puts the EU in doubt as whether Turkey can be reliable in long-term with the EU's sociopolitical agenda. Another pressure point is the vague diplomatic links between Ankara and Moscow, hindering the possibility of establishing a long-term strategy for Ukraine.

Despite this, pragmatic security needs force the EU and Türkiye to increase cooperation at the operational level. Countries that prioritise direct security threats within NATO, such as Poland, the Baltic countries and Italy, are more open to bilateral defense cooperation with Türkiye. Poland's Bayraktar TB2 procurement and Italy's involvement in the TCG Anadolu process via Navantia are examples of this pragmatic approach. Türkiye can integrate the experience gained from the TCG Anadolu and MILGEM projects into joint patrol and force projection missions within Europe's Mediterranean security concept. In particular, the operational compatibility of the European UAV fleet (Eurodrone) with Turkish systems could be discussed.

Türkiye's rise does not negate the fact that in some technological fields Türkiye is still dependent on foreign sources. Especially in critical areas such as jet engines, long-range air defence systems and nuclear technologies, the need for external resources continues.



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Exclusion from the F35 programme and the ongoing renewal of F16s pose important challenges for Turkish air superiority. Nevertheless, Türkiye's defence industry policy aims to reduce these dependencies in the medium and long term in line with the vision for national and domestic production.

Türkiye stands as a potential partner and an important example for EU members trying to achieve national autonomy in defence. While the EU has the means and the wind behind it to bolster defence spending, redesigning such a strategy to include Türkiye alongside other partners at the regional level will both increase NATO's power and contribute to the EU's strategic autonomy goals.

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