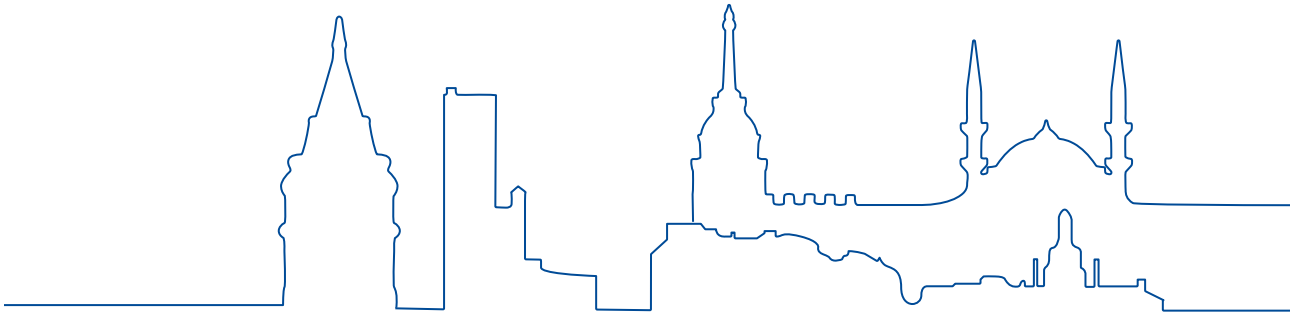


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EUROPE'S DEFENSE AWAKENING AND ITS STRATEGIC PARTNERS: ANY PLACE FOR TURKEY?

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"Re-Arm Europe" Beyond the EU

Donald Trump's return to the White House has sent shockwaves across European capitals, reshaping what had long been taken for granted: that, regardless of its leadership, Washington would unconditionally align and support Europe's strategic and security needs. Yet, the new U.S. administration's erratic stance on NATO, the temporary—then resumed—halt in arms deliveries to Ukraine, and the exclusion of European leaders from critical negotiations have all reinforced a stark reality: Europe must take responsibility for its own defense.[1] In response, European leaders have acted with unprecedented determination and unity. The Re-Arm Europe initiative launched by the Commission in March 2025, a landmark EUR 800 billion investment in military capabilities, aims to fortify the continent's defense autonomy.[2] Yet, while ambitious, this effort faces significant challenges. Financial disagreements among EU members, bureaucratic constraints, and the sheer scale of building a European military framework independent of the U.S. raise doubts about how it can be implemented.

Nonetheless, some of Europe's biggest players are stepping up. Germany has announced plans to restructure its fiscal policy and boost military spending to 3% of GDP, while French President Emmanuel Macron has signaled a potential expansion of France's nuclear deterrent within Europe. Meanwhile, countries like Italy, Belgium, and Spain have reaffirmed their commitment to meeting NATO's 2% defense spending target. Still, as the Re-Arm Europe's documents highlight, Europe cannot afford to overlook the importance of external security partners to speed up this initiative.[3] This reality was already acknowledged at the "Securing Our Future" summit in London on March 2, where European leaders met to discuss increased military support for Ukraine. The formation of a "coalition of the willing," including non-EU countries like the UK, Canada, and Turkey, signaled a growing consensus that there cannot be a solid and sustainable European security architecture without extending it beyond EU borders.[4]

While including the first two countries is certainly less surprising and challenging, it is worth exploring how, despite remaining political cleavages, Turkey can be integrated into this emerging security architecture. Among the many agreements that are making headlines are the recent strategic deals between Italy and Turkey. Could such moves represent a springboard for a new cooperation framework at the EU level?

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A Matter of Facts: Turkey's Strategic Relevance for Europe

NATO's Secretary General Mark Rutte has continuously emphasized that "involving non-EU allies in EU defense industrial efforts is vital for the security of Europe" and urged leaders to put aside differences with Ankara to boost security synergies.[5] He was recently echoed by Polish Prime Minister Donald Tusk, who repeated his intentions "to make the European perspective increasingly viable for Turkey and taken seriously by all partners in Europe, both in the field of defense and the defense industry."[6]

Indeed, despite political tensions, Turkey is already a de facto defense partner for Europe.[7] Over the past decade, Ankara has significantly advanced its defense industry, becoming a global leader in unmanned aerial vehicles (UAVs), armored vehicles, naval platforms, and missile systems.[8] In 2024, Turkish defense exports reached USD 7.2 billion, a 29% increase from the previous year. More importantly, Turkey has moved beyond exports, forging deep bilateral defense ties with EU countries. Turkish-built military vessels for Portugal, armored vehicle deliveries to Romania, and UAV contracts across Eastern Europe showcase Ankara's growing defense footprint. Strategic technology partnerships are also emerging: Spain is acquiring 24 Hürjet advanced trainer jets from Turkey, and Germany has greenlit a Turkish facility for artillery ammunition production after also lifting the ban on the sale of Eurofighter jets.[9]

Nowhere is this deepening security partnership more evident than in Italy-Turkey defense cooperation. Rome and Ankara have embarked on a strategic partnership that could serve as a blueprint for broader EU-Turkey collaboration.[10] At the heart of this partnership is a 50-50 joint venture between Baykar and Leonardo, headquartered in Italy. This agreement focuses on the co-design, development, and production of advanced UAVs, leveraging Baykar's expertise in drone technology and Leonardo's dominance in European defense certification and mission systems. The European UAV market, valued at USD 100 billion, represents a critical sector where Turkey can play a leading role in boosting European capabilities and increase its defense exports.

The first tangible result of this collaboration will be an upgraded variant of Baykar's Akinci drone, featuring a 1.5-ton payload capacity—unprecedented for European UAVs. Beyond drones, Baykar's growing industrial footprint in Italy, including its acquisition of Piaggio Aerospace, signals Ankara's long-term commitment to European defense markets. Italian Defense Minister Guido Crosetto has hailed this partnership as a turning point for European innovation, positioning Italy and Turkey as key players in the continent's security setting.[11] More broadly, this collaboration aligns with Europe's push for strategic autonomy, reducing dependency on non-European suppliers while integrating an already capable defense partner into the continent's evolving military-industrial complex.[12]

Springboards for New Cooperative Frameworks?

While stating that "Trump is making Europe great again"[13] might be too bold, U.S. actions have undeniably created an extraordinary syntony among European leaders, resulting in fast-paced, ambitious, and—to some extent—unprecedented initiatives. This context creates opportunities for establishing new cooperation formulas with Turkey. Driven by a dose of pragmatism and realism, EU institutions are suddenly back to reevaluating Ankara as a strategic partner and, after years of caution, as a candidate country. Yet, Turkey's formal integration into the EU's defense architecture remains fraught with challenges.

Greece and Cyprus remain staunch opponents of closer EU-Turkey defense ties, as seen in Greece's veto of EU-funded Turkish drone deliveries to Ukraine. To avoid such deadlocks, Brussels should institutionalize structured cooperation mechanisms, such as coalition-based security initiatives, allowing willing EU members to engage Turkey on defense without requiring full unanimity.[14]

Ankara also maintains a delicate balancing act between Moscow and the West, and Russia is likely to resist Turkey's deeper integration into EU defense projects, particularly in Ukraine. A clear EU framework is needed to define the limits of Turkish involvement, ensuring Ankara remains a valuable potential mediator but that its defense cooperation does not trigger excessive Russian retaliation.[15] Another key obstacle is trust. Turkey's rule-of-law issues remain a sticking point for many European policymakers. While security concerns have led to increased pragmatism, trust remains fragile. Meaningful steps from Turkish leadership in this direction could help rebuild confidence and ensure that growing defense cooperation does not overshadow fundamental EU principles.

Although Turkish leadership's push for full EU membership is unlikely to materialize, recent defense agreements highlight a realistic, interest-driven path forward. Turkey's participation in EU defense procurements and reconstruction schemes should not be seen as a political concession but rather as a strategic necessity for both sides. Europe faces an unprecedented security crisis. The U.S. withdrawal from its traditional security commitments has left the EU scrambling to fill the void, and time is not on its side. Given its growing defense-industrial base, geostrategic position, and existing ties with EU member states, Turkey is uniquely positioned to contribute to Europe's security efforts in a meaningful way.

However, this partnership must be strategically institutionalized. The EU needs to move beyond ad hoc bilateral deals and create formalized defense cooperation frameworks that would allow Turkey to engage in a structured, predictable manner. Ankara, in turn, must demonstrate that its security ambitions align with European interests, not just its own geopolitical calculations and pursuit of strategic autonomy.[16] The coming years will determine whether Europe and Turkey can forge a sustainable defense relationship—one that is not dictated by fleeting crises but built on mutual interests and strategic necessity. If managed pragmatically, this could mark the beginning of a more durable and productive partnership that starts from but is not necessarily limited to the security realm.

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