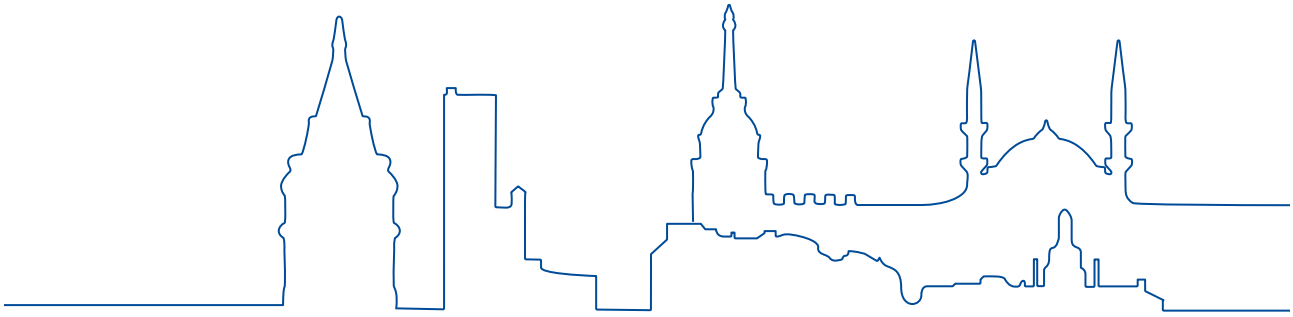


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BETWEEN NATO 3.0 AND ANKARA'S STRATEGIC MOMENT: WHY EUROPE CANNOT BUILD ITS SECURITY ARCHITECTURE WITHOUT TURKEY

Samuele C.A. Abrami, Researcher at CIDOB, 2024/25 Mercator-IPC Fellow
Megan Gisclon, IPC Managing Editor and Researcher

Toward NATO 3.0

One year after the Hague Summit formalized the push for radically higher defense spending, allies arrived in Turkey to face an array of strategic challenges. Russia's war against Ukraine continues to reshape European security. Conflict and instability across the Middle East have reinforced the importance of NATO's Southern flank. At the same time, U.S. President Donald Trump's erraticism has revived long-standing concerns about the future of American engagement in Europe. Against this backdrop, the Ankara Summit was meant to provide reassurance about the future direction of the Alliance itself and of Europe's position within it.

The outcomes partially reflected those expectations. The final declaration reaffirmed collective defense, announced more than USD 50 billion in new procurement initiatives, pledged an additional EUR 70 billion in support for Ukraine in both 2026 and 2027, and reinforced commitments to increase defense spending.[1] More importantly, the summit confirmed a broader transition that has been underway for several years, namely a shift "from burden sharing to strategic delivery"[2]: less about how much allies spend and more about who can provide military capabilities, industrial production, technological innovation, and operational readiness. In many respects, Ankara offered the clearest glimpse yet of what many analysts have begun describing as "NATO 3.0": an Alliance in which European allies assume greater responsibility for conventional defense and defense-industrial production while the United States remains the indispensable strategic anchor.[3]

However, despite the language of unity and collective action toward NATO's 5% spending target, many of the actual outcomes of the summit remain to be seen.[4] The reality is that NATO cannot function at the operational and strategic levels below a certain threshold without Washington's military commitment, and most of Europe is still a long way from spending 5%—let alone duplicating these capabilities—despite recent strides. The final communiqué may have reaffirmed Alliance cohesion, but the real work to strengthen transatlantic relations still lies ahead.

Furthermore, the summit reinforced questions already shaping debates across Europe[5]: how should the continent prepare? Is strategic autonomy achievable through EU-led mechanisms, or would it be more realistic, faster, and more sustainable if it involved external partners in the process? Here is where Turkey enters the debate on the trajectory and effectiveness of a more European NATO.

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The "Winner" of the Summit?

Much of the post-summit commentary focused on one country as the real "winner"[6] of the summit: Turkey. Certainly, the ceremonial fanfare from the Turkish government and the friendship between President Donald Trump and Turkish President Recep Tayyip Erdoğan boosted Ankara's image and political weight within the Alliance.[7] More concretely, the U.S. President's promise to lift the Countering America's Adversaries through Sanctions Act (CAATSA) and thereby reopen discussions on Turkey's possible return to the F-35 program are all positive signs for Turkey, even if these actions require more lengthy Congressional approval and Turkey's ability to relinquish possession of the S-400. Yet, more attentive observers noted that Turkey was central because many of the questions dominating the summit increasingly revolved around it[8]—additionally, because there are no "winners" and "losers" in an alliance that is largely based on consensus among 32 members. That is, Turkey entered the summit from a position of genuine strength, primarily driven by larger structural shifts impacting the Euro-Atlantic region.

Turkey has been a NATO member since 1952 and currently has the second-largest army in NATO: an army that is not only sizeable but also battle-tested and exceedingly capable. While its strategic importance has rarely been questioned, over the years its quest for strategic autonomy through an erratic foreign policy has created rifts with its Western allies. However, more recent geopolitical shifts seem to have quietly realigned their position[9]—or at least, mutual necessities. Since February 2022, Turkey has, in some ways, effectively returned to a role reminiscent of its original Cold War function within NATO: helping contain Russian influence and preventing other threats from the South. Ankara supplied military assistance to Ukraine, strengthened defense-industrial cooperation with Kyiv, and enforced the Montreux Convention to restrict the passage of belligerent warships through the Turkish Straits. However, contrary to this position, it also maintained political and economic channels with Moscow and refused to join Western sanctions. This balancing act has often frustrated allies, but it also provides Turkey with leverage that few NATO members possess.[10] At the same time, Ankara has expanded its role across theaters increasingly relevant to European security, from Syria and Libya to the South Caucasus and the wider Middle East. What makes it crucial today is that, compared to its unilateral approach to national interests a few years ago, Turkish officials are now promoting multilateral engagement to build shared regional diplomatic and security structures that better complement U.S. and European interests.[11]

Still, in an era when alliances are becoming more fluid, geography and presence alone do not explain Turkey's growing weight. As NATO adapts to a more demanding strategic environment, European governments are searching for military capabilities and industrial production that Turkey can provide.[12] Indeed, over the last two decades, Ankara has built a defense sector capable of producing high-end drones and other unmanned capabilities, armored vehicles, naval platforms, munitions, and increasingly sophisticated aerospace technologies at scale. Defense and aerospace exports surpassed USD 10 billion in 2025 and now reach markets across the globe, while companies such as Baykar, ASELSAN, Roketsan, and TUSAŞ co-produce aerospace, missile, and naval systems with European partners.[13] As European countries seek to expand production and address shortages exposed by the war in Ukraine, Turkish capabilities are becoming increasingly difficult to ignore. The prominence of the Defense Industry Forum during the summit, in which Turkish companies featured prominently,[14] reflected precisely this turn. Moreover, the Trump administration's recent sale of GE F110 engines to Turkey to complete the production of Ankara's own indigenous fifth-generation fighter jet, the TAI KAAN, also enhances its strategic capabilities—soon making it the only European NATO member to produce a fifth-generation aircraft.[15]

Ankara's direction of travel is clear: at least in Washington, many policymakers increasingly view Turkey less through the lens of past disputes and more through the lens of strategic necessity. From a European perspective as well, this offers a window of opportunity to reengage constructively with

Turkey. However, it also epitomizes the broader dilemmas confronting the EU. On the one hand, the Ankara summit reinforced discussions that, for quite some time now, have taken place in Brussels and European capitals about whether and how to include Turkey in the emerging European security architecture. On the other hand, it did not remove the EU's perception that Turkey is also a country whose democratic trajectory, disputes with Greece and Cyprus, and history of friction with both the EU and within NATO continue to generate mistrust.

More specifically, the Ankara Summit exposed an increasingly difficult question for the EU: how to deal with a partner that has become more relevant, more capable and, in many respects, more indispensable, while remaining politically controversial and only partially integrated into the institutional frameworks shaping the continent's defense future.

More Indispensable, Still Under-Integrated

Over the past decade, relations between Ankara and many European capitals have been shaped by political tensions, democratic backsliding, disputes in the Eastern Mediterranean, and the gradual collapse of Turkey's EU accession process. Yet precisely as Turkey's relationship with Europe has become more politically problematic, its strategic value has increased. The Ankara Summit highlighted this contradiction in unusually clear terms.[16] Europe increasingly relies on Turkish contributions to advance many of its security objectives yet still struggles to define Turkey's place within the institutional design devised to support those objectives.

The paradox is that Turkey's integration into Europe's security architecture is already taking place. It is happening through industrial partnerships, procurement decisions, technology transfers, and operational cooperation. The Italy-Turkey cooperation through the Leonardo–Baykar partnership and other joint projects,[17] Spain's unspoken yet rising defense collaboration,[18] the UK's new defense agreement,[19] and France's surprising openness to Turkey's acquisition of the SAMP/T[20] all point in the same direction: European governments increasingly treat Turkey as a security partner whose capabilities are difficult to ignore.

However, such relationships are also a liability, since these partnerships develop mostly at the bilateral level rather than through the EU's multinational programs. Turkey is therefore becoming part of Europe's security architecture de facto but not yet de jure. Concretely, this means that Turkish technologies, companies, and capabilities are gradually becoming embedded within European defense supply chains while Turkey remains largely excluded from many of the political and financial instruments driving Europe's defense transformation. The EU's EUR 150-billion SAFE program is perhaps the clearest example. Although on paper non-EU countries are eligible for the program, Turkey remains excluded from cooperation.[21] As Ankara sees it, Europe wants access to Turkish capabilities without fully integrating Turkey into the frameworks that regulate them. Instead, from Brussels' viewpoint, part of the problem stems from enduring political disputes around Ankara's democratic backsliding that, reinforced by the arrest of Istanbul's opposition mayor Ekrem İmamoğlu and the Turkish government's continued judicial attacks on the main opposition party,[22] continue to shape negative perceptions of Turkey across many European capitals. Yet part of the problem also lies within Europe itself, with a lack of internal consensus over foreign and security policies[23] and with Greece and Cyprus remaining able to block Turkish participation in key initiatives.[24]

The geopolitical environment, though, increasingly favors Turkey and exposes Europe's credibility.[25] Trump's return has reinforced a more transactional understanding of alliances, while Europe itself has entered what can best be described as a crisis-driven mood. Security concerns today receive greater attention than they did a decade ago, when democratic conditionality occupied a much more central place in EU–Turkey relations. This does not mean that democracy and the rule of law no longer matter. It implies that criticism that once dominated discussions about Turkey now coexists with a growing awareness of the country's strategic value.[26]

The challenge is therefore not whether political concerns should disappear but whether Europe can develop frameworks capable of sustaining strategic cooperation despite recurring disagreements.[27]

The Way Ahead to Solve the Conundrum

Ultimately, this is not simply a debate about Turkey. It is a debate about Europe itself. If European governments genuinely intend to build a stronger European pillar within NATO, can that effort include restrictive, protectionist EU structures? Or does a more credible European security architecture require more EU-led efforts to incorporate key non-EU NATO Allies, such as Turkey, Canada, Norway, and the United Kingdom? The NATO summit did not entirely answer this question, but it made it considerably harder to avoid. Certainly, the number of new, innovative defense initiatives that included or were even led by these four non-EU allies—ranging from the Canadian-led Defense, Security, and Resilience Bank to Turkey and the UK's participation in a new multinational High Visibility Project to pool and share a fleet of Airbus A400M military aircraft—showcased the centrality of these states for enhancing European security writ large.

Ankara exposed a new predicament: that "European security and EU security might no longer be the same thing."[28] As governments debate strategic autonomy, rearmament, and a stronger European pillar within NATO, they are increasingly confronted with the limitations of an exclusively EU-centered approach to security. Many of the actors most relevant to Europe's future defense sit outside the Union and its programs. Significantly, some European capitals already appear to be moving toward a wider understanding of security. Italian Defense Minister Guido Crosetto recently argued that Europe's response should not be confined to the boundaries of the European Union but should instead develop within an authentically continental framework that includes partners such as the United Kingdom, Norway, Turkey, and Ukraine.[29] Whether this vision ultimately prevails remains uncertain, but it reflects a growing awareness that Europe's security challenges are outpacing its institutional machinery and past cleavages.

Turkey sits at the center of this debate. On the one hand, it has spent years building room for maneuver through strategic autonomy, regional activism, and a rapidly expanding defense industry. On the other hand, it remains deeply connected to the wider Western defense ecosystem through technology, industrial partnerships, certification, markets, and most importantly, NATO membership. The relationship is increasingly one of mutual dependence. Turkey has become too important for Europe to treat as strategically peripheral. It remains too integrated into the wider Euro-Atlantic system to pursue complete separation from it.

For years, Europe treated Turkey primarily as a difficult neighbor, anchoring almost every discussion to the accession process and to the many disputes that progressively eroded mutual trust. Continuing along this frozen path risks producing the worst of both worlds: a strategically indispensable partner that remains politically under-integrated. At the moment, Turkey-EU relations seem stuck in a situation of "managed pragmatism," functional cooperation where necessary, political distance where possible.[30] Here, the problem of Turkey's democracy might limit a truly European defense cooperation. But, as former CHP leader Özgür Özel recently wrote, "Turkey's European partners must learn to look beyond the current government."[31]

This means broadening the horizon and considering the current strategic alignment as a springboard rather than a temporary, detached issue: to go beyond membership-related cleavages and implement structured, sustainable forms of cooperation through newly institutionalized pillars. If fostering democratic resilience in Turkey is viewed as integral to Europe's broader long-term strategic interests,[32] Europe may increasingly need to think of Turkey not simply as a problem to manage but as part of the solution—and eventually build the institutional mechanisms to reflect that reality.

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