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Could defence cooperation generate a spillover effect for Türkiye–EU relations?

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INTRODUCTION

The need to strengthen Europe’s autonomous defence capabilities has become increasingly urgent in response to the ongoing existential threat from Russia and growing uncertainty surrounding US security commitments to Europe. Consequently, EU member states have stepped up defence spending and launched EU-level initiatives such as the ReArm Europe Plan / Readiness 2030. These developments have also encouraged closer cooperation between the EU and European non-EU NATO allies, notably the United Kingdom, Türkiye and Norway. In this evolving context, Türkiye’s geopolitical relevance to the EU has grown significantly. With NATO’s second-largest army and a strategic geographic position, the country offers considerable potential for enhanced cooperation. Yet substantial political constraints continue to hinder the realisation of that potential.

Türkiye–EU relations remain structurally complex. Although EU leaders increasingly refer to Türkiye as a ‘partner’, the country is still formally a candidate for EU membership and is therefore de facto more than just a partner. However, accession negotiations are effectively frozen due to democratic backsliding, including longstanding concerns over the rule of law and fundamental freedoms. This creates a structural policy dilemma for the EU: how to deepen cooperation with Türkiye in critical strategic domains while accession remains stalled, political divergences persist and no clear long-term vision exists for the relationship.

Since the 2015 migration crisis triggered by the Syrian civil war, relations have become increasingly transactional. Yet this approach has clear limitations, restricting both strategic depth and long-term sustainability. Rapid geopolitical shifts and intensifying security competition

require more durable forms of cooperation that extend beyond issue-specific bargaining. In this context, trust, predictability and a minimum degree of shared values remain essential to the EU’s pursuit of strategic autonomy.

Defence cooperation is one of the most sensitive and strategically consequential domains of that goal. More than other policy areas, it requires long-term planning as well as a high degree of trust, predictability and political alignment. While Türkiye’s military capabilities, expanding defence industry and readiness to contribute to a new European defence architecture represent significant assets, the political concerns outlined create serious obstacles.

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Türkiye has signalled its ambition to play a central role in the EU’s emerging defence architecture, including through participation¹ in Security Action for Europe (SAFE), the EU’s new financial instrument designed to strengthen joint capabilities and integrate defence industries. Statements by several EU leaders² have likewise underlined Türkiye’s strategic importance

for European defence.³ Nevertheless, cooperation has progressed rather slowly. Türkiye is still excluded from SAFE, while Canada, a non-European NATO ally, has formally joined the programme.

Against this backdrop, this policy brief explores why Türkiye–EU defence cooperation is advancing more slowly than both sides would like and explores the conditions under which it could reach its full potential. It also asks whether, under more favourable political circumstances, defence cooperation could generate a spillover effect comparable to the European Coal and Steel Community in the 1950s, with broader implications for Türkiye–EU relations and beyond.

STATE OF PLAY

Defence cooperation between Türkiye and the EU offers clear mutual benefits, and Ankara’s potential contribution could significantly increase Europe’s capacity to ensure its long-term security. However, such cooperation cannot be viewed in isolation from the broader context of Türkiye–EU relations. The EU tends to prioritise partners it considers trustworthy, predictable and like-minded. Although the slow pace of cooperation generates frustration and criticism on the Turkish side, the underlying rationale shaping EU policy also warrants careful analysis. While the EU is often criticised for slow progress and short-sightedness, it is equally important to examine the deeper factors that continue to constrain closer cooperation as well as the opportunities for advancing full-fledged defence cooperation.

Obstacles to full-fledged defence cooperation

For Türkiye and the EU, strengthening defence cooperation ultimately depends on the ability to prioritise a shared future through joint investment in areas that enhance the strategic autonomy of both sides. This is not merely a policy option but an emerging necessity. Yet achieving it remains highly challenging. The current state of Türkiye–EU relations constrains deeper engagement, meaning that defence cooperation cannot be considered in isolation from the broader political context of Türkiye–EU relations. The obstacles affecting defence cooperation are not standalone problems; rather, they are manifestations of the structural tensions shaping the broader relationship. As long as these constraints persist, the full potential of defence cooperation will remain difficult to realise.

1) Fundamental democratic principles

Although some argue that the EU has deprioritised democratic concerns in its engagement with Türkiye,⁴ democratic issues remain a central obstacle to meaningful progress.⁵ While Brussels has often sought to avoid confrontation with the Turkish government and relied on transactional cooperation, genuine normalisation cannot occur without concrete steps towards democratisation.

The prospect of a new wave of democratisation has been articulated by opposition actors in Türkiye; however, substantial reforms under the current government

appear highly unlikely. In the short term, the overriding priority must therefore be the preservation of Türkiye’s democratic character. Recent developments, including the imprisonment of the main opposition’s presidential candidate Ekrem İmamoğlu since March 2025, have further intensified these concerns.

For meaningful cooperation in highly strategic areas such as defence, Türkiye’s continued anchoring within the democratic camp remains essential. This should also be a priority for the EU, particularly if its strategic autonomy agenda is to offer a credible alternative to the global outlook associated with US President Donald Trump and the governance models advanced by authoritarian regimes such as Russia, China and Iran.

One positive element in this context is the commitment of the main opposition party, the Republican People’s Party (CHP), and its presidential candidate to democracy and the EU perspective. This includes a clear strategy to return to the EU accession process and pursue democratic reforms should they come to power.⁶ The path to the next elections is likely to be extremely challenging given the growing pressure on the opposition. Nevertheless, it appears resilient and potentially stronger than at the time of its 2024 local election victory.

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2) Predictability

The EU’s pursuit of strategic autonomy reflects a growing awareness of the risks of relying on unpredictable allies. Declining confidence in the durability of US security guarantees has reinforced this view. In this context, predictability has become a prerequisite for deeper defence cooperation.

From the EU’s perspective, concerns about the unpredictability of Turkish foreign policy continue to shape risk assessments and limit the scope for integration. Although there have been some positive shifts in certain areas, including recent coordination efforts in relation to the Iran war, concerns persist in EU capitals over Türkiye’s ties with Russia and China, its perceived foreign policy unpredictability and low level of alignment with the EU’s Common Foreign and Security Policy (CFSP).⁷ These factors continue to constrain deeper defence integration. Because defence cooperation

entails long-term commitments and sensitive security arrangements, perceived unpredictability acts as a structural obstacle to deeper engagement.

3) Trust

Trust represents another indispensable pillar of defence cooperation. A strategic and sensitive field of this kind requires a high degree of mutual confidence, particularly regarding intentions, policy continuity and behaviour in times of crisis. However, trust deficits persist on both sides.⁸

These deficits stem from accumulated political disagreements, diverging threat perceptions and priorities, and broader tensions in bilateral relations. As a result, defence cooperation cannot advance through technical arrangements or pragmatic engagement alone. Any sustainable framework for cooperation must therefore incorporate deliberate efforts to rebuild trust, enhance transparency and sustain consistent political dialogue. Without progress in this area, even mutually beneficial initiatives are likely to encounter political resistance.

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4) An opaque vision for Türkiye–EU relations

Another structural obstacle is the absence of a clearly articulated long-term vision for Türkiye–EU relations. The EU’s current approach largely rests on postponing discussions about the future of the relationship, maintaining cooperation through transactional engagement and waiting for more favourable political conditions before addressing strategic questions.

While this strategy may preserve short-term cooperation, it is increasingly at odds with the nature of relations, particularly in defence cooperation, which inherently requires long-term planning with predictable, trustworthy and politically aligned partners. The EU therefore needs to clarify both its approach to present-day Türkiye and a longer-term vision for relations with a potentially more democratic Türkiye. Greater clarity would not only facilitate defence cooperation but also send an important signal to millions in Türkiye who support and work for democratic change.

5) The Cyprus issue

The Cyprus issue remains a major obstacle to Türkiye–EU relations, including in the field of defence cooperation.

It creates two main challenges: the veto power of two EU member states over EU–Türkiye defence cooperation, and the question of under what conditions Ankara would agree to include an EU member state – the Republic of Cyprus – in defence frameworks, including NATO structures in Europe and NATO–EU cooperation.

However, this issue should not be considered in isolation from the broader political context, particularly the lack of long-term vision for Türkiye–EU relations. If Ankara were to return to a credible path of democratisation and re-engage with the EU accession process, a central commitment of the opposition, addressing the Cyprus issue may become more feasible within a wider political framework.

A sustainable solution is likely to depend on a broader alignment of strategic objectives. This could include progress towards Türkiye’s EU accession, Cyprus’ potential accession to NATO and movement towards resolving the Cyprus issue on a basis of the peaceful co-existence of Turkish Cypriot and Greek Cypriot communities within the EU. Such a comprehensive approach could not only address a longstanding political dispute, but also create new opportunities to strengthen the EU’s security and strategic autonomy.

Opportunities for advancing full-fledged defence cooperation

Despite these significant obstacles, there is substantial potential for deeper defence cooperation between the two sides. If progress can be made in addressing the constraints shaping relations, Türkiye could emerge as a key contributor to Europe’s evolving security architecture. Several factors make such cooperation both feasible and strategically beneficial for both Türkiye and the EU.

1) The growing capacity of the Turkish defence sector

One of the most important opportunities lies in the rapid development of Türkiye’s defence industry. Over the past decade, Türkiye has largely completed its transition from a defence importer to a country capable of designing, producing and exporting advanced defence technologies. The domestic localisation rate in the sector now exceeds 80%, significantly reducing foreign dependency and strengthening the country’s industrial autonomy. According to official figures, the Turkish defence industry comprises around 3,500 firms employing roughly 100,000 people and managing a project portfolio worth more than \$100 billion across more than 1,400 projects.⁹

Exports have also grown rapidly. Turkish defence and aerospace exports reached approximately \$10.56 billion in 2025, up from \$7.1 billion in 2024 – an increase of nearly 49%.¹⁰ The sector’s share of Türkiye’s total exports also rose from 2.7% in 2024 to around 3.4% in 2025. Notably, more than half of these exports go to the EU, NATO allies and the United States, indicating the degree to which the Turkish defence industry is already integrated into the Western defence ecosystem. Türkiye aims to rank among the world’s top 10 defence and aerospace exporters by 2028.

Beyond production capacity, the sector has also benefited from rising investment in research and development, particularly in emerging technologies and digital capabilities. This technological expansion has been accompanied by a ‘reverse brain drain’,¹¹ with highly skilled engineers and researchers returning to Türkiye to work in its rapidly growing defence and technology sectors. Together, these developments have strengthened the country’s ability to innovate and compete in areas that are increasingly central to modern defence systems.

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Importantly, the growth of the Turkish defence sector has also generated multiple forms of cooperation with European defence companies and industries.¹² Many Turkish firms are already integrated into European supply chains and joint production initiatives, creating a practical foundation for deeper EU–Türkiye defence industrial cooperation. Through joint projects,¹³ investment, acquisitions,¹⁴ subsidiaries and newly established companies¹⁵ in EU member states, the Turkish defence industry is already positioning itself as part of the broader European defence ecosystem.

2) Türkiye’s willingness to be part of the European defence architecture

The Turkish government has taken a clear position on Türkiye’s role in the emerging European defence architecture. Both President Recep Tayyip Erdoğan¹⁶ and Foreign Minister Hakan Fidan¹⁷ have repeatedly stressed that Türkiye should be included in EU security and defence initiatives, arguing that a European defence architecture that excludes Türkiye would not be viable. Turkish officials also frame such participation as part of a broader process of integration with Europe¹⁸ and suggest that closer defence cooperation could help revive momentum in Türkiye’s EU path.

This position, combined with the strong interest shown by Turkish defence companies in participating in EU defence initiatives, creates a promising outlook for future cooperation. Given that defence cooperation requires firm strategic commitments and long-term planning, this willingness can be seen as an important signal of openness to a shared future – provided that the political obstacles identified above, including democratic concerns, are addressed.

3) Turkish opposition’s strong support

Türkiye’s potential role in European defence is supported not only by the government, but also by the main opposition party. Within Turkish political debate, the issue is increasingly framed as a matter of long-term national interest rather than a purely partisan position. A notable example was the appeal made last year by the jailed Istanbul mayor and opposition presidential candidate, Ekrem İmamoğlu,¹⁹ to the German government to lift its veto on the sale of Eurofighter Typhoon jets to Türkiye. He argued that Germany should not block the deal because of his imprisonment and that defence cooperation should instead be evaluated in light of Türkiye’s long-term national interests and European future. On the same issue, CHP Chair Özgür Özel also held meetings in Berlin, including with German Defence Minister Boris Pistorius, in an effort to secure Germany’s approval for the deal.²⁰

These efforts reflect the opposition’s broader belief that it would come to power after the next elections and that, following the necessary democratic reforms, Türkiye could revitalise its EU accession process. Beyond defence cooperation, closer ties with the EU are also seen by the opposition as an essential pathway towards a democratic political future for Türkiye.

A potential spillover effect

While transactionalism may appear to offer a quick fix for reducing dependence on the US, alignment in terms of values, priorities and long-term perspectives is also essential.

Defence cooperation could represent a strategic turning point in Türkiye’s EU integration. On its own, it would not be enough to produce such an outcome. However, if combined with a genuine process of democratisation, it could generate a spillover effect capable of fostering deeper and long-term ties between Türkiye and the EU. This could position Türkiye not as a potential burden – a perception that still shapes the view of many sceptics within the EU – but as a key contributor to a shared European future.

Economic integration between Türkiye and the EU has a long history. Over the decades, it has brought the two sides closer and created significant mutual interdependence. Yet its impact on political integration has remained limited. Defence cooperation, by contrast, could prove more transformative due to its strategic nature. Unlike traditional economic relations, cooperation in defence requires a high degree of trust, predictability and long-term commitment. It also creates deeper forms of interdependence and requires a shared sense of Europe’s future.

Several developments already point in this direction. Turkish defence companies are increasingly integrated into European supply chains and industrial partnerships, often through joint projects, investments and subsidiaries in EU member states, including Spain, Italy, Poland,

Belgium and Latvia. At the political level, both the Turkish government and the opposition support closer defence cooperation with the EU. At the same time, geopolitical developments are pushing both sides towards closer collaboration.

Defence cooperation on its own will not be enough. However, if Ankara returns to a path of democratisation, defence cooperation could accelerate the accession process and help address at least some of the obstacles that, from the EU side, slowed it down two decades ago. This would also represent the most favourable outcome for the EU's strategic autonomy objectives. In this context, a democratic Türkiye could be a gamechanger for the Union's future.

Elements of this spillover dynamic are already visible elsewhere in Europe. Relations between the EU and the United Kingdom, for example, have improved significantly in recent years, increasingly extending beyond defence. Similarly, the prospect of EU accession for countries such as Iceland²¹ and Norway²² appears more plausible today than in the past.

The emerging European defence architecture therefore has the potential not only to strengthen the EU internally but also to enhance its global influence. Within such a framework, Türkiye could become one of the key actors contributing to Europe's security and long-term strategic resilience.

RECOMMENDATIONS

1. Develop a structured framework for EU–Türkiye defence cooperation

The EU should establish a structured framework for defence cooperation with Türkiye that goes beyond ad hoc engagement. Türkiye's participation in SAFE or similar future initiatives could provide a basis for such a framework.

2. Create mechanisms to gradually integrate the Turkish defence industry into European defence initiatives

The EU should explore ways to gradually integrate Turkish companies into Europe's defence architecture. Participation in R&D projects and wider defence-industrial initiatives could foster practical cooperation and deepen institutional ties.

3. Use defence cooperation as a confidence-building tool

Defence cooperation should be approached not only as a security issue but also as an opportunity to rebuild trust in the broader Türkiye–EU relationship. Joint projects, industrial partnerships and structured dialogue could create new channels for communication and cooperation.

4. Link deeper defence cooperation to democratic progress

While strategic cooperation with Ankara is increasingly important for Europe's security, the EU should

continue to emphasise the importance of democratic standards and the rule of law. A credible return to democratisation in Türkiye would significantly improve the prospects for deeper defence cooperation. The EU should therefore include democracy-oriented benchmarks in its approach to engagement in this field.

5. Articulate a clearer long-term vision for Türkiye–EU relations

The EU's current strategy of postponing discussions about the future of Türkiye–EU relations is becoming increasingly unsustainable. If defence cooperation is to develop meaningfully, EU leaders will need to articulate a clearer strategic vision for its relationship with Ankara. This does not necessarily require immediate progress on accession, but it does require a transparent framework outlining possible pathways for deeper political and strategic cooperation.

6. Sustain political dialogue across the Turkish political spectrum

The EU should engage with a broad range of actors in Türkiye, including the government, opposition parties, businesses and civil society. The fact that support for closer cooperation with Europe exists across much of the Turkish political spectrum creates an opportunity for long-term engagement. Maintaining dialogue with the opposition will help ensure that cooperation remains sustainable regardless of domestic political developments.

CONCLUSION

The debate on the future of the European security architecture is no longer theoretical. Russia's war on Ukraine, ongoing conflict in the Middle East and growing uncertainty surrounding transatlantic security guarantees are pushing the EU to strengthen its defence capabilities. In this evolving environment, Türkiye's military capacity, expanding defence industry and geostrategic importance make it difficult to ignore as a potential contributor to Europe's defence.

At the same time, the limits of the current relationship are clear. Transactional cooperation has enabled the two sides to manage specific crises, but it has not generated the degree of trust, predictability or strategic alignment needed for deeper cooperation in strategic areas such as defence. Without addressing the broader political context of the relationship, even the most promising initiatives will struggle to realise their full potential.

One should not fall into the illusion that defence cooperation alone can transform Türkiye–EU relations. However, it holds greater potential than many other forms of cooperation to generate a meaningful spillover effect. If accompanied by a renewed process of democratisation in Türkiye and a clearer long-term vision from the EU, it could help reshape the relationship. By fostering deeper strategic interdependence and shared security interests, it may help reposition Türkiye as a key contributor to Europe's future rather than as a persistent political

dilemma. While the current Turkish government does not have such a vision, the main opposition's long-term commitment to democratisation and EU accession should be clearly recognised by the EU, particularly considering the possibility of a political transition in the near future.

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Whether this opportunity materialises will depend on political choices on both sides. At a time when Europe is redefining its role in an increasingly uncertain world, a more constructive and forward-looking relationship with Türkiye could prove a strategic investment in Europe's long-term security and stability.

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