



• ANALYSIS

# Beyond a Costly Exclusion: A SAFE-plus Arrangement for Türkiye and European Defence

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# BEYOND A COSTLY EXCLUSION: A SAFE-PLUS ARRANGEMENT FOR TÜRKİYE AND EUROPEAN DEFENCE

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This analysis examines the SAFE-plus framework, which proposes a defined intermediary status for integrating non-EU NATO allies into the European Union's defense efforts without making them members of the Union.

## SUMMARY

Europe's rearmament push has exposed a structural contradiction at the heart of EU defence policy: Türkiye holds one of the continent's most capable militaries, supplies artillery, drones, and air defence systems to more than a dozen European states, and yet sits outside every major EU defence instrument, including SAFE, PESCO, and the European Defence Fund. The exclusion does not follow from the rules, which already allow the integration the Canada agreement proves possible; it follows from a political veto held by a small number of member states, principally Greece and the Greek Cypriot administration, over bounded bilateral disputes. European capitals that resist Türkiye's institutional inclusion at the Brussels level are simultaneously signing major contracts with Turkish firms at the national level, a contradiction that grows harder to sustain as Turkish defence exports pass \$10 billion and five Turkish firms enter the SIPRI Top 100. This analysis proposes a SAFE-plus arrangement: a defined associate status connecting non-EU NATO allies to the EU defence effort, reachable either by assembling existing legal instruments (EDA arrangement, PESCO entry, SAFE participation agreement on the Canada template) or by building an intergovernmental mechanism outside the treaty framework that bypasses unanimity. With Türkiye hosting the NATO Ankara Summit and set to command the Allied Reaction Force from 2028, the architecture of European security is still open to shaping, but the window is closing.

## INTRODUCTION

For most of the past decade, the relationship between Türkiye and the European Union in matters of defence has been defined by a paradox. Türkiye is a NATO ally that ranks, by almost every military measure, among the most capable actors on the European continent, yet it sits outside the institutional architecture through which the Union is now building its collective defence identity. The instruments that make up this architecture, from the ReArm Europe plan and the Security Action for Europe (SAFE) to Permanent Structured Cooperation (PESCO) and the European Defence Fund, rest on a logic in which participation follows political belonging rather than strategic weight. The result is a defence order that measures contribution by treaty membership rather than by military capability, strategic necessity, or the wider strategic picture.

There is, however, a second reading of the same reality. Across a widening set of bilateral and mini-lateral arrangements, individual European states are choosing Turkish platforms, drawing Turkish firms into their supply chains, and signing strategic-partnership documents with Ankara that carry more operational substance than many formal multilateral frameworks. The two readings are not in contradiction. They describe the same object from different vantage points: one from Brussels, where the institutional map still governs, and one from the national capitals, where operational necessity increasingly dictates what gets built and with whom.

This analysis begins from the premise that the gap between these two readings has grown wide enough to matter, and that it should be read against a larger

shift. At a moment when the reliability of the American security guarantee has become a question rather than an assumption, the Union is using industrial and financial instruments to rebuild itself as a strategic bloc and, in the same movement, to draw the boundary of who belongs to it. Türkiye's exclusion is therefore not merely a missed contract or a frozen accession file. It is exclusion from the early shaping of Europe's next security order, and its costs fall on the excluding side as heavily as on the excluded.

The case it makes is not that Türkiye should be given special treatment. It is that an exclusion sustained by the objections of a small number of member states, at a time of systemic external pressure, is incoherent on its own terms and costly for European defence as a whole. From this the paper develops a constructive proposition: that there is an institutional middle ground, short of full membership, through which Türkiye and comparable non-EU NATO allies could be connected to the Union's defence effort. We refer to it provisionally as a SAFE-plus arrangement. The paper sets out what such an arrangement might look like, why it would serve European interests and not only Turkish ones, and why the effort to build it already yields a degree of integration worth having in its own right.

## THE ARCHITECTURE OF EXCLUSION, AND THE ACCESS IT ALREADY ALLOWS

The European Union's current defence build-up is not a single programme but a set of connected instruments, and Türkiye's position is not the same in each. The ReArm Europe plan, renamed Readiness 2030, sets the overall envelope and the spending goals. Within it, SAFE provides loans for joint procurement, PESCO organizes collaborative capability projects, and the European Defence Fund and the newer European Defence Industry Programme (EDIP) fund research and development. The European Defence Agency works alongside these as the body that coordinates capability projects and manages cooperation with non-EU states. Read together, the instruments share one feature in how they treat Türkiye: access is shaped less by what Turkish industry can offer than by political considerations within the Union.

It is worth being precise about what exclusion means here, because the rules are more open than the political debate suggests. Under SAFE, only member states can take the loans, and that is true for every non-member, not for Türkiye alone. But the supply side is already open. The regulation asks that at least 65 per



The central argument of this analysis is not that Türkiye should receive preferential treatment. Rather, it is based on the assessment that, at a time of mounting external and systemic pressures, an exclusionary approach driven by the objections of a small number of member states is both internally inconsistent and costly to the European defense effort as a whole.

cent of the cost of a funded product come from the EU, the EEA-EFTA states, or Ukraine, which leaves up to 35 per cent for other suppliers, a share open to third countries, Türkiye among them, with no further agreement required.<sup>1</sup> What the 35 per cent does not allow is for a Turkish firm to act as a prime contractor, or as a critical subcontractor taking a large part of a contract, or for Turkish content to be counted as European. Those steps need a separate participation agreement, and it is there, not at the level of basic supply, that the real barrier sits.

Such an agreement is not closed to Türkiye in principle. As an EU candidate, Türkiye belongs to the group of states with which the Union may conclude one, and the Union has already done so with Canada.<sup>2</sup> The Canada agreement is telling, because it shows how far the arrangement can reach: it lets Canadian content count for up to 80 per cent of a contract's value, well above the 35 per cent that otherwise applies.<sup>3</sup> What Türkiye has not been given is the negotiation itself. The Commission has not brought a Turkish agreement to the member states, and the question of whether such an agreement would need unanimity, and so be open to a veto by Greece or the Greek Cypriot administration, has never been tested.<sup>4</sup> The exclusion works in the space the rules leave open, and is settled by political choice rather than by the text.

The same pattern runs through the other instruments. PESCO admits non-member states to individual projects, but only where they meet conditions set in 2020: sharing the Union's values, holding an agreement on the exchange of classified information, and gaining the unanimous consent of the states already in the project.<sup>5</sup> Türkiye has no such information-sharing agreement with the Union and has not joined any PESCO project, even as Canada, Norway, the United States, the United Kingdom, and most recently Switzerland have entered the project on military mobility.<sup>6</sup> The European Defence Fund restricts recipients and subcontractors to entities established in the Union or in an associated EEA-EFTA state, so a Turkish firm cannot be a funded participant. EDIP keeps

1 "Regulation (EU) 2025/1106", *Official Journal of the European Union*, accessed June 22, 2026, <https://eur-lex.europa.eu/cli/reg/2025/1106/oj>; "SAFE: Security Action for Europe", *European Commission*, accessed June 22, 2026, [https://defence-industry-space.ec.europa.eu/eu-defence-industry/safe-security-action-europe\\_en](https://defence-industry-space.ec.europa.eu/eu-defence-industry/safe-security-action-europe_en).

2 "SAFE: Council concludes agreement with Canada", *Council of the European Union*, 15 June 2026, accessed June 22, 2026, <https://www.consilium.europa.eu/en/press/press-releases/2026/06/15/safe-council-concludes-agreement-with-canada/>.

3 *Agreement between the European Union and Canada concerning participation under the SAFE Instrument*; "SAFE: member states endorse agreement on the participation of Canada", *Council of the European Union*, 19 December 2025, accessed June 22, 2026, <https://www.consilium.europa.eu/en/press/press-releases/2025/12/19/safe-member-states-endorse-agreement-on-the-participation-of-canada/>.

4 *Council Decision*, document ST-16853/1/25 REV 1, accessed June 22, 2026, <https://data.consilium.europa.eu/doc/document/ST-16853-2025-REV-1/en/pdf>; *Article 218 TFEU*, accessed June 22, 2026, [https://eur-lex.europa.eu/cli/treaty/tfeu\\_2016/art\\_218/oj/eng](https://eur-lex.europa.eu/cli/treaty/tfeu_2016/art_218/oj/eng).

5 *Council Decision (CFSP) 2020/1639 of 5 November 2020 establishing the general conditions under which third States could exceptionally be invited to participate in individual PESCO projects*, accessed June 22, 2026, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32020D1639>.

6 "PESCO: Switzerland will be invited to participate in the Military Mobility project", *Council of the European Union*, 13 January 2025, accessed June 22, 2026, <https://www.consilium.europa.eu/en/press/press-releases/2025/01/13/pesco-switzerland-will-be-invited-to-participate-in-the-military-mobility-project/>.

its funding to member states, associated countries, and Ukraine, but lets a supported joint procurement include a single non-EU subcontractor for between 15 and 35 per cent of a contract's value, under conditions on ownership, intellectual property, and export.<sup>7</sup> The European Defence Agency offers a lighter route, the administrative arrangement that Norway, the United States, and others already hold, but Türkiye has none.<sup>8</sup>

**TABLE 1. TÜRKİYE'S ACCESS ACROSS THE EU DEFENCE INSTRUMENTS**

Instrument	Türkiye's position now	Route to fuller participation
SAFE (procurement loans)	May supply within the 35 per cent non-EU content share with no agreement; cannot act as a prime or critical contractor; loans reserved for member states	A participation agreement on the template used with Canada, lifting the content ceiling and allowing prime-contractor status; likely subject to unanimity
PESCO (capability projects)	In no project; holds no classified-information agreement with the Union	A security-of-information agreement and the unanimous consent of the states already in a project (2020 third-state conditions)
EDF and EDIP (R&D funding)	Not a funded participant under the EDF; under EDIP, eligible only as a single non-EU subcontractor (15–35% of a contract) under conditions on ownership, IP, and export	Access tied to membership or to an associated-country status
European Defence Agency	Holds no administrative arrangement	An administrative arrangement of the kind Norway and the United States already hold

Taken together, this is not the picture of a closed door. Türkiye is eligible in principle, it can already supply at the margin, and the instruments contain ready channels for deeper participation. What is missing is the political decision to open them. The single obstacle is a veto that a small number of member states could raise but that has never actually been put to the test. This matters for what follows, because it means the question is not whether the rules allow Türkiye's inclusion. They do. The question is why a willing and capable ally has not been offered the connection the rules already provide, and what it costs Europe to keep withholding it.

## TÜRKİYE'S DEFENCE-INDUSTRIAL NETWORK IN EUROPE

Before turning to what an institutional connection might look like, it is worth establishing what already exists beneath the institutional level. Over the past few years, a dense network of bilateral and co-production arrangements has formed between Türkiye and individual European states, and its pace has quickened as the continent rearms. This network is not the object of the argument. Türkiye

<sup>7</sup> Regulation (EU) 2021/697 establishing the European Defence Fund, accessed June 22, 2026, <https://eur-lex.europa.eu/eli/reg/2021/697/oj>; Regulation (EU) 2025/2643 establishing the European Defence Industry Programme, accessed June 22, 2026, <https://eur-lex.europa.eu/eli/reg/2025/2643/oj/eng>.

<sup>8</sup> "Third parties", *European Defence Agency*, accessed June 22, 2026, <https://eda.europa.eu/who-we-are/third-parties>.

does not need these arrangements as a substitute for institutional access, and they are not offered here as proof that such access is unnecessary. They matter for two narrower reasons. The first is that when European states choose on operational grounds rather than political ones, they increasingly choose Turkish industry. The second is that the network gives any future institutional arrangement something concrete to build on, a base of capability and trust that it could formalize rather than invent.



In recent years, Türkiye and European states have developed an extensive network of bilateral procurement and joint production, the depth of which has accelerated alongside Europe's efforts to expand its defense industrial capacity.

The deepest relationships have formed with the larger Western European producers. The clearest case is the United Kingdom. In October 2025 the two countries signed a deal for 20 Eurofighter Typhoon aircraft, reported at around €9 billion, the first new order for the Typhoon since 2017.<sup>9</sup> The two governments have since placed their defence-industrial cooperation within a broader strategic-partnership framework, set out in a joint statement signed in April 2026.<sup>10</sup>

Italy has become the site of Türkiye's most striking move into European industry. Baykar, the maker of the Bayraktar drones, completed its acquisition of Piaggio Aerospace, bringing an established Italian aerospace manufacturer under Turkish ownership,<sup>11</sup> and formed a joint venture with Leonardo, Italy's largest defence company, to combine Turkish unmanned systems with Italian sensors and integration.<sup>12</sup> Spain has engaged as a buyer rather than a partner in production: at the end of 2025 it signed a contract for 30 Hürjet trainer and light-combat aircraft, the first export order for the Turkish jet,<sup>13</sup> and the two governments have discussed cooperating on a future aircraft carrier built on Spanish shipbuilding and Turkish design.<sup>14</sup> Germany, which has backed Türkiye's inclusion, has also seen Turkish industry take root on its soil: the Turkish firm Repkon is establishing a 155mm artillery-ammunition plant in Germany, at a moment when the shortage of shell-production capacity is among Europe's most pressing.<sup>15</sup>

9 "Turkey and the United Kingdom Sign 9 Billion Deal to Purchase 20 Eurofighter Jets", *Euronews*, 27 October 2025, accessed June 22, 2026, <https://www.euronews.com/2025/10/27/turkey-and-the-united-kingdom-sign-9-billion-deal-to-purchase-20-eurofighter-jets>

10 "UK-Türkiye Strategic Partnership Framework: Joint Statement", *Government of the United Kingdom*, 23 April 2026, accessed June 22, 2026, <https://www.gov.uk/government/publications/uk-turkiye-strategic-partnership-framework-joint-statement>.

11 "Türkiye's Baykar Completes Acquisition of Piaggio Aerospace", *Daily Sabah*, accessed June 22, 2026, <https://www.dailysabah.com/business/defense/turkiyes-baykar-completes-acquisition-of-piaggio-aerospace>.

12 "Baykar, Leonardo Advance Memorandum of Understanding with New 50:50 Joint Venture", *The Aviationist*, 24 June 2025, accessed June 22, 2026, <https://theaviationist.com/2025/06/24/baykar-leonardo-lba-systems/>.

13 "Spain Signs Contract for 30 Hürjets", *The Aviationist*, 30 December 2025, accessed June 22, 2026, <https://theaviationist.com/2025/12/30/spain-signs-contract-for-30-hurjets/>.

14 "Turkey, Spain Plan to Jointly Build Aircraft Carrier", *Military*, accessed June 22, 2026, <https://military.com/en/news/turkey-spain-plan-to-jointly-build-aircraft-carrier/>.

15 "Repkon 155mm Ammunition Facility in Germany", *DefenseHere*, accessed June 22, 2026, <https://www.defensehere.com/en/repkon-155mm-ammunition-facility-in-germany/>.

A second tier runs through central and southern Europe, where Turkish platforms are being bought in volume. Romania has been the most active. It contracted for 1,059 Otokar Cobra II armoured vehicles, with much of the production to be carried out in Romania,<sup>16</sup> and signed a separate intergovernmental contract worth about €223 million for the lead ship of Türkiye's Hisar class of corvettes, which will make Romania the first NATO member to field the Turkish Hisar-D air-defence system.<sup>17</sup> Poland, which has sharply expanded its defence budget in recent years, selected ASELSAN ahead of established competitors for an electronic-warfare contract worth around \$410 million.<sup>18</sup> Portugal awarded the Turkish naval firm STM a contract to build multirole logistics-support ships, the company's first naval export to a NATO member.<sup>19</sup>

A third group is defined less by the size of individual contracts than by direction of travel. In Ukraine, the Bayraktar TB2 that became a symbol of the early war remains in service.<sup>20</sup> Finland, newly inside NATO and exposed along a long border with Russia, signed a defence-industry cooperation agreement with Türkiye in 2025.<sup>21</sup> In central Europe, ASELSAN and the Czech CSG group established a joint venture domiciled in the European Union and unveiled a Korkut air-defence system mounted on a Czech Tatra chassis, placing Turkish technology inside an EU-based company.<sup>22</sup> These run alongside the wider NATO frameworks for multinational capability delivery in which Türkiye increasingly takes part.<sup>23</sup>

16 "Romania Signs for 1059 Otokar Cobra II Vehicles", *Shephard Media*, accessed June 22, 2026, <https://www.shephard-media.com/news/landwarfareintl/romania-signs-for-1059-otokar-cobra-ii-vehicles/>.

17 "Türkiye Finalizes Export of Hisar-Class Light Corvette to Romania", *Naval News*, December 2025, accessed June 22, 2026, <https://www.navalnews.com/naval-news/2025/12/turkey-finalizes-export-of-hisar-class-light-corvette-to-romania/>; "Romania to Acquire Turkish Hisar-Class Corvette TCG Akhisar for €223 Million", *Defence Industry Europe*, accessed June 22, 2026, <https://defence-industry.eu/romania-to-acquire-turkish-hisar-class-corvette-tcg-akhisar-for-e223-million/>.

18 "ASELSAN to Deliver Electronic Warfare Systems to Polish Armed Forces under \$410 Million Contract", *Defence Industry Europe*, accessed June 22, 2026, <https://defence-industry.eu/aselsan-to-deliver-electronic-warfare-systems-to-polish-armed-forces-under-410-million-contract/>; "ASELSAN Signs 410 Million USD Export Contract with Poland", *EDR Magazine*, accessed June 22, 2026, <https://www.edrmagazine.eu/aselsan-signs-410-million-usd-export-contract-with-poland/>.

19 "Portuguese Navy Awards Türkiye's STM Contract to Build Multirole Logistics Support Ships", *Naval News*, December 2024, accessed June 22, 2026, <https://www.navalnews.com/naval-news/2024/12/portuguese-navy-awards-turkiyes-stm-contract-to-build-multirole-logistics-support-ships/>; "In Deal With Portugal, Turkish Naval Firm STM Signs First Export Contract to NATO Nation", *Breaking Defense*, December 2024, accessed June 22, 2026, <https://breakingdefense.com/2024/12/in-deal-with-portugal-turkish-naval-firm-stm-signs-first-export-contract-to-nato-nation/>.

20 "Return of the Bayraktar TB2: Drone Strikes Again in Ukraine", *Naval News*, June 2025, accessed June 22, 2026, <https://www.navalnews.com/naval-news/2025/06/return-of-the-bayraktar-tb2-drone-strikes-again-in-ukraine/>.

21 "Turkey and Finland Sign Defense Industry Cooperation Agreement", *Turkish Minute*, 3 June 2025, accessed June 22, 2026, <https://www.turkishminute.com/2025/06/03/turkey-and-finland-sign-defense-industry-cooperation-agreement/>; "Turkey and Finland Sign Defense Industry Cooperation Deal Amid Rising Russian Threats", *Nordic Monitor*, June 2025, accessed June 22, 2026, <https://nordicmonitor.com/2025/06/turkey-and-finland-sign-defense-industry-cooperation-deal-amid-rising-russian-threats/>.

22 "CSG and ASELSAN Form EU-Based Joint Venture, Unveil Korkut Air Defence System on Tatra Wheeled Platform", *Defence Industry Europe*, accessed June 22, 2026, <https://defence-industry.eu/csg-and-aselsan-form-eu-based-joint-venture-unveil-korkut-air-defence-system-on-tatra-wheeled-platform/>.

23 "NATO Allies Step Up Multinational Capability Delivery Cooperation", *NATO*, 24 June 2025, accessed June 22, 2026, <https://www.nato.int/en/news-and-events/articles/news/2025/06/24/nato-allies-step-up-multinational-capability-delivery-cooperation/>.

**TABLE 2. TÜRKİYE'S DEFENCE-INDUSTRIAL NETWORK IN EUROPE (SELECTED)**

Country	Principal arrangement
United Kingdom	20 Eurofighter Typhoon aircraft (around €9 billion); strategic-partnership framework
Italy	Baykar's acquisition of Piaggio Aerospace; Baykar–Leonardo joint venture
Spain	30 Hürjet aircraft; talks on a jointly built aircraft carrier with Navantia
Germany	Repkon 155mm artillery-ammunition plant
Romania	1,059 Otokar Cobra II vehicles; Hisar-class corvette (about €223 million), first NATO operator of the Hisar-D system
Poland	ASELSAN electronic-warfare contract (around \$410 million)
Portugal	STM multirole logistics-support ships, its first naval export to a NATO member
Ukraine	Bayraktar TB2 in service; continued Baykar presence
Finland	Defence-industry cooperation agreement (2025)
Czechia	ASELSAN–CSG joint venture domiciled in the EU (Korkut system on a Tatra chassis)

Read individually, these are separate contracts. Read together, they describe something the institutional debate in Brussels does not capture: a continent that, at the level of national procurement and industrial partnership, already treats Turkish defence industry as part of its supply base. What this pattern means, for Ankara and for Europe, and why a relationship so developed in practice remains so undeveloped in institutional form, is the question the next section takes up.

## THE LOGIC BENEATH THE CONTRACTS

The previous section set out what has been built. This one asks why, because the pattern becomes an argument only once its underlying logic is clear. Two distinct rationales are at work beneath the contracts, one European and one Turkish. They begin from different places, but for the moment they pull in the same direction.

The European logic is operational. The states buying Turkish equipment are not making a statement about Türkiye's place in Europe; they are solving a problem of capacity and time. The continent's rearmament has run up against the limits of its own industrial base. Demand for artillery ammunition, drones, armoured vehicles, and air defence has outpaced what European producers can deliver at the speed the security environment now demands, and prices have risen with the backlog. Turkish industry offers systems that are available quickly, competitively priced, and in many cases tested in recent combat. For a defence ministry under pressure to field capability without long delay, these are weighty advantages, and they explain why even governments that resist Türkiye's inclusion at the institutional level have signed contracts with Turkish firms at the national one. The scale is no longer marginal: Turkish defence and aerospace

exports passed \$10 billion in 2025,<sup>24</sup> and Turkish firms now feature among the world's 100 largest arms producers, five of them in the 2024 list, the most ever, their combined arms revenues up 11 per cent on 2023, and Türkiye is now the world's eleventh-largest arms exporter.<sup>25</sup>

The Turkish logic is strategic, and it is here that this analysis parts company with a reading that treats the bilateral network as a destination. From Ankara's vantage point the network is not a substitute for institutional access but a route towards it. Each contract, each co-production arrangement, each strategic-partnership document adds to a position from which Türkiye can argue, with evidence rather than aspiration, that it already functions as part of European defence. The network is a foundation to build on, not consolation. Its purpose is to make exclusion from the institutional level harder to justify, not to make that level unnecessary. These ties complement institutional access rather than replace it.

This is the crux, because the two logics expose a divergence inside Europe itself. At the level of national capitals, the operative test is capability: who can deliver what is needed, and when. At the level of Union institutions, the operative test is belonging: who is inside the political community the instruments are meant to build. For most members these two tests point the same way. In Türkiye's case they point in opposite directions, and the contradiction is becoming harder to contain. A continent cannot indefinitely treat a major ally, whose alignment will be decisive for the very bloc Europe is building, as part of its defence in practice while keeping it an outsider in principle, particularly when the gap is held open not by a shared European judgement but by the objections of a small number of member states. Repeated at each step of this build-up, such exclusion does more than deny a contract: it risks slowly detaching a major ally from the very bloc Europe is assembling.

This divergence raises a sharper question, which the next section takes up. If Türkiye is relied upon at the operational level yet excluded at the institutional one, the exclusion is not explained by capability, by need, or by the rules, each of which points the other way. It may instead reflect something the instruments are meant to do beyond procurement, namely to mark the boundary of the community they are building. The next section asks whether Türkiye's exclusion is best understood as simple institutional habit, or as a deliberate decision about where the boundary of the new bloc is drawn.

24 "Türkiye's Defense, Aviation Exports Cross \$10B Threshold in 2025", *Daily Sabah*, accessed June 22, 2026, <https://www.dailysabah.com/business/defense/turkiyes-defense-aviation-exports-cross-10b-threshold-in-2025>; "Turkey's Defense Exports Top \$10B in 2025", *The Defense Post*, 5 January 2026, accessed June 22, 2026, <https://thedefensepost.com/2026/01/05/turkeys-defense-exports-10b-2025/>.

25 "SIPRI Top 100 Arms-Producing and Military Services Companies, 2024", *Stockholm International Peace Research Institute*, accessed June 22, 2026, <https://www.sipri.org/publications/2025/sipri-fact-sheets/sipri-top-100-arms-producing-and-military-services-companies-2024>; "Trends in International Arms Transfers, 2024", *SIPRI*, accessed June 22, 2026, <https://www.sipri.org/publications/2025/sipri-fact-sheets/trends-international-arms-transfers-2024>.

## DRAWING THE BOUNDARY

The exclusion described so far is not confined to one programme. The same line reappears across the instruments: loans reserved for members under SAFE, project entry gated by unanimous consent under PESCO, funding reserved for EU and associated entities under the European Defence Fund and EDIP, and, in Türkiye's case, the absence of even the administrative arrangement that the European



As geopolitical blocs continue to consolidate, Europe cannot indefinitely sustain a policy that excludes a key ally at the institutional level while, in practice, treating it as an integral part of its defense architecture. This is particularly untenable when such exclusion is maintained not by a shared European consensus, but by the objections of only a limited number of member states.

Defence Agency extends to others. When a boundary recurs this consistently across instruments designed at different times and for different purposes, it becomes harder to read it as the incidental result of each programme's rules and easier to read it as a single line being drawn through all of them.

The question is what that line tracks, and the answer is revealing, because it is not capability. Türkiye fields one of the largest and most capable militaries on the continent and, as the previous sections showed, supplies a growing share of what European states are buying. Nor is it alliance membership: Türkiye has belonged to NATO for over 70 years. Nor is it formal candidacy: Türkiye remains a candidate for Union membership. The clearest evidence that the criterion is political rather than military lies in the Union's own partnership practice. Since 2024 the EU has concluded security and defence partnerships with a widening circle of states, among them Norway, the United Kingdom, Moldova, Japan, South Korea, Canada, and India, several of them far from the European theatre, while Türkiye, a NATO ally on the Union's own borders, has none.<sup>26</sup> A partnership framework that can reach Seoul, Tokyo, and New Delhi but not Ankara is not selecting on the basis of military weight or proximity.

What the line really tracks is political alignment, not capability, and at this point the instruments are doing more than buying equipment: they are marking who belongs to the emerging bloc. At a moment when the external guarantee that underwrote European security for two generations has become uncertain, the Union is using its industrial and financial instruments to constitute itself as a strategic actor in its own right. Constituting a bloc is not only a matter of pooling money and capability; it is also a matter of deciding who belongs to it. In setting their participation rules, the defence instruments are drawing the perimeter of that emerging community. Türkiye occupies an awkward

<sup>26</sup> "Security and Defence Partnerships", *Council of the European Union*, accessed June 22, 2026, <https://www.consilium.europa.eu/en/policies/security-defence-partnerships/>; "Security and Defence: EU and UK Conclude Security and Defence Partnership", *European External Action Service*, 19 May 2025, accessed June 22, 2026, [https://www.eeas.europa.eu/eeas/security-and-defence-eu-and-uk-conclude-security-and-defence-partnership\\_en](https://www.eeas.europa.eu/eeas/security-and-defence-eu-and-uk-conclude-security-and-defence-partnership_en).

place against this perimeter: too capable and too involved to be treated as irrelevant, yet treated by a very few member states as too politically sensitive to admit without argument. It has been positioned, in effect, as a standing borderline case.

The boundary, however, is neither natural nor fixed, and this is the point most easily lost from view on every side. The line does not express a settled European consensus that Türkiye does not belong. It is sustained by the objections of a small number of member states, chiefly Greece and the Greek Cypriot administration, and those objections are anchored in specific disputes, over maritime boundaries in the Aegean and the eastern Mediterranean, and in domestic political cycles that harden or ease from one election to the next, such as the Greek elections due by 2027. These are the kind of short-term domestic calculation to which a question of this strategic weight should not be held hostage. A perimeter drawn by a few hands, over particular concerns, at one particular moment, is not fixed; what a few hands have drawn, other hands can later redraw. The next section asks whether, set against the scale of the threat that prompted Europe's rearmament, holding the line where it now sits serves European security at all.

## THE DISPROPORTION, AND WHAT IT COSTS EUROPE

The scale of a response is a measure of the threat behind it. In rebuilding its defenses Europe has committed to the largest collective rearmament effort the continent has undertaken since the Cold War.<sup>27</sup> A figure of that size is a statement about how grave, and how lasting, the danger is judged to be: a possible war on the Union's eastern flank and a security guarantee from across the Atlantic that can no longer be assumed.

Set against a threat of that magnitude, the reasons for keeping Türkiye outside the architecture come into a different proportion. The objections are not invented. They rest on real disputes, over maritime boundaries in the Aegean and the eastern Mediterranean and over the unresolved status of the island, and on a longer history of tension in the region. But these are regional, bounded disputes among allies, of a kind that alliances have long found ways to manage without letting them dictate the whole of common policy. To allow them to shape the architecture of an €800 billion response to a continental emergency is a striking disproportion. A set of bilateral grievances, however genuine, is being permitted to govern a decision whose stakes are of an altogether different order.

<sup>27</sup> "White Paper for European Defence: Readiness 2030", *European Commission*, accessed June 22, 2026, [https://commission.europa.eu/document/download/e6d5db69-e0ab-4bec-9dc0-3867b4373019\\_en?filename=White+paper+for+European+defence+%E2%80%93+Readiness+2030.pdf](https://commission.europa.eu/document/download/e6d5db69-e0ab-4bec-9dc0-3867b4373019_en?filename=White+paper+for+European+defence+%E2%80%93+Readiness+2030.pdf).

The disproportion matters because the cost does not fall on Türkiye alone. Shutting out the ally best placed to supply artillery ammunition, drones, and air defence at the speed and price Europe needs imposes a cost on European defence itself, a kind of capability tax that the Union pays in slower deliveries, higher prices, and thinner stocks. These are precisely the three pressures the rearmament was meant to relieve. An exclusion that raises the cost and lengthens the timeline of Europe's own rearmament does not make European defence stronger; it makes it dearer and slower, and it does so at the moment of least slack. And the financial cost is the smaller part of it. Sustained across the whole build-up, the exclusion risks pushing a major NATO ally out of the Western alliance itself, a loss that, set against the very threat now driving Europe's rearmament, would weigh far heavier in the short and medium term than the roughly €800 billion now being mobilized against that threat.

There is, finally, a strategic incoherence that should trouble Europe more than it does. Within NATO, Türkiye is treated as a frontline ally and one of the alliance's larger contributors. Within the European Union's parallel defence build-up, it is treated as an outsider. The two organizations overlap heavily in membership and almost entirely in purpose, and relying on an ally in one frame while holding it at arm's length in the other weakens the coherence of the Western defence effort taken as a whole. If the exclusion is disproportionate to the grievances that sustain it, and costly to the very states that maintain it, then the constructive question is no longer whether the line should be redrawn but how. That is the subject of the next section.

## **A SAFE-PLUS MIDDLE GROUND**

If full membership is not on the table and scattered bilateral deals are not enough, the question is what lies between them. This analysis calls the answer, provisionally, a SAFE-plus arrangement. The idea is a standing associate status that connects non-EU NATO allies to the Union's defence effort without requiring them to become members. Türkiye is the case this analysis is concerned with, but the category is broader: the United Kingdom and Norway face a version of the same problem, that of close allies deeply involved in European security yet outside the institutions now organizing it. The "plus" is what distinguishes such a status from the bilateral network described earlier. The bilateral deals are real but scattered, revocable, and dependent on the mood of each capital. An associate status would give the same relationship a stable and predictable institutional form, a defined place from which an ally contributes and on which it can rely. What follows sketches two routes towards it. They are offered not as finished blueprints but as alternatives whose trade-offs are worth setting side by side.

The first route would assemble an associate status from the access points the instruments already contain. None of the building blocks is new. An administrative arrangement with the European Defence Agency, of the kind Norway and the United States already hold, would give a structured channel into capability work.<sup>28</sup> An agreement on the exchange of classified information, together with entry into selected PESCO projects on the model of the military-mobility project that Norway, Canada, the United States, and most recently Switzerland have joined, would extend it into collaborative capability.<sup>29</sup> A SAFE participation agreement on the template already used with Canada would open prime-contractor status and lift the content ceiling above the standard share.<sup>30</sup> Stitched together, these pieces would amount in practice to the associate status the “plus” describes, and they would sit wholly inside the Union’s existing legal order. The strength of this route is its solidity and the fact that it is demonstrably possible: the Canada agreement proves that a non-member can be brought this far into the Union’s defence framework. Its weakness is the one identified earlier. The treaty-based steps, and the SAFE agreement in particular, are likely to require unanimous approval, which leaves them exposed to the objection of Greece or the Greek Cypriot administration, the very veto whose reach has never been tested.

The second route would avoid that exposure by building outside the treaty framework rather than within it. Proposals already in circulation, among them Bruegel’s for a European Defence Mechanism modelled on the European Stability Mechanism, envisage an intergovernmental body for defence funding and procurement that sits beside the Union rather than inside it.<sup>31</sup> Because such a mechanism would rest on an agreement among participating governments rather than on the EU treaties, it could be opened to non-EU partners without triggering the unanimity an internal route requires. The Bruegel proposal names the United Kingdom, Norway, and Switzerland as candidates for inclusion, and the same logic would extend to Türkiye, which could connect through such a mechanism on the strength of its contribution. The strength of this route is precisely that it does not require the consent of every member: states that object can remain outside it without blocking the rest. Its weakness is that it builds something new



Given the scale of the threats Europe faces today, there is no longer any strategic justification for keeping Türkiye outside the continent’s defense architecture.

28 “Third parties”, *European Defence Agency*, accessed June 22, 2026, <https://eda.europa.eu/who-we-are/third-parties>.

29 “PESCO: Canada, Norway and the United States Will Be Invited to Participate in the Project Military Mobility”, *Council of the European Union*, 6 May 2021, accessed June 22, 2026, <https://www.consilium.europa.eu/en/press/press-releases/2021/05/06/pesco-canada-norway-and-the-united-states-will-be-invited-to-participate-in-the-project-military-mobility/>.

30 “SAFE: Council Concludes Agreement with Canada”, *Council of the European Union*, 15 June 2026, accessed June 22, 2026, <https://www.consilium.europa.eu/en/press/press-releases/2026/06/15/safe-council-concludes-agreement-with-canada/>.

31 “Governance and Funding of European Rearmament”, *Bruegel*, accessed June 22, 2026, <https://www.bruegel.org/policy-brief/governance-and-funding-european-rearmament>.

rather than using what exists, demands the political effort of assembling a coalition, and sits one step further from the Union proper than the first route does.

<b>TABLE 3. TWO ROUTES TO A SAFE-PLUS ARRANGEMENT</b>		
	<b>Route A: associate status from existing instruments</b>	<b>Route B: a treaty-external mechanism</b>
<b>Building blocks</b>	An EDA administrative arrangement, a security-of-information agreement, selected PESCO projects, and a SAFE participation agreement on the Canada template	A new intergovernmental body, such as a European Defence Mechanism modelled on the European Stability Mechanism, sitting beside the Union
<b>Legal location</b>	Within the Union's existing legal order	Outside the EU treaty framework
<b>Exposure to veto</b>	Exposed: the treaty-based steps are likely to need unanimity, leaving them open to objection by Greece or the Greek Cypriot administration (untested)	Avoided: objecting states can remain outside without blocking the others
<b>Precedent or basis</b>	The Canada SAFE agreement shows a non-member can be integrated this far	Proposals such as Bruegel's European Defence Mechanism
<b>Main strength</b>	Institutional solidity; uses channels that already exist	Does not depend on unanimous consent
<b>Main weakness</b>	Exposed to the veto	Builds something new; needs a coalition; sits one step further from the Union

Set side by side, the two routes are best understood not as rivals but as a principled claim and a realistic vehicle. The first states what Türkiye is entitled to in principle, as a candidate and an ally for whom every building block already exists and has been extended to others. The second offers a way to deliver much of the same substance even if the principled route is blocked, by routing around the obstacle rather than waiting for it to clear. The Canada precedent shows that institutional integration of a non-member is possible; the external-mechanism model shows how a comparable result might be reached without a unanimous vote. Because the obstacle is a veto rather than the rules, the more promising course is to lead with the route that does not depend on unanimous consent: a standing arrangement, open to non-EU NATO allies such as Türkiye and built alongside the Union rather than inside it. The principled claim can be pressed at the same time, but it is this veto-free route that offers the most realistic opening.

Two things make this more than a thought experiment. The first is that the veto which shadows the principled route is contingent rather than absolute. It has never been formally tested, and the political conditions that sustain it shift with Greek electoral cycles and with the periodic hardening and easing of the disputes that drive it. What looks immovable in one season may be negotiable in another. The second is that it need not wait for unanimity. A route built by a coalition of the larger defence producers, several of which are already Türkiye's

industrial partners, can take shape among the willing, without waiting for the most reluctant member to change its mind. The design that finally emerges will be settled in negotiation, not in a paper such as this. What the paper maintains is narrower and firmer: that workable routes exist, that the obstacles to them are political rather than legal, and that the choice of whether to take them is therefore a choice, not a constraint.

## THE UNION'S OWN COHERENCE

The exclusion is most often discussed as a problem in relations between the Union and Türkiye. It is also, and increasingly, a problem inside the Union. Both the way SAFE was built and the way Türkiye has been kept out of it expose fault lines in how the Union makes defence policy, and an associate arrangement would do something to relieve them.

The first fault line runs between the institutions. SAFE was adopted under Article 122 of the Treaty, an emergency provision that let the Council act without the European Parliament's ordinary role as co-legislator. The Parliament has contested that choice, arguing that the conditions for emergency action were not met and asking the Court of Justice to annul the regulation on that ground.<sup>32</sup> Whatever the Court decides, the episode leaves the Union's flagship defence-finance instrument resting on a legal basis that its own Parliament regards as improper, a sign of how much strain the speed of rearmament has placed on the ordinary machinery of decision.

The second fault line runs between the member states. On Türkiye, the Union's largest member has pressed for inclusion, while the objection that holds the matter up is sustained by a small number of member states working through the points in the instruments where unanimity is required.<sup>33</sup> A Union in which a few states can hold back a step that a larger member actively favours, on a question of this magnitude, has a coherence problem that exists independently of Türkiye, and that the Türkiye case simply makes unusually plain.

These two strains compound one another. An instrument assembled by setting the Parliament aside and then applied in a way that lets a minority override a majority whose preference the bilateral deals across Europe have already made plain, is doubly exposed. Türkiye's exclusion sits at the intersection of the two and makes both visible at once. It is the clearest current example of a deeper in-

32 Rafal Mańko, "Legal Bases in Article 122 TFEU: Tackling Emergencies through Executive Acts", *European Parliamentary Research Service*, 15 April 2025, accessed June 22, 2026, <https://epthinktank.eu/2025/04/15/legal-bases-in-article-122-tfeu-tackling-emergencies-through-executive-acts/>; "European Parliament Takes EU Member State Governments to Court over the SAFE Defense Fund", *Euneas*, 25 August 2025, accessed June 22, 2026, <https://www.eunews.it/en/2025/08/25/european-parliament-takes-eu-member-state-governments-to-court-over-the-safe-defense-fund/>.

33 "Germany Sides With Turkey, Not Greece, Over EU's SAFE Program", *The National Herald*, accessed June 22, 2026, <https://www.thenationalherald.com/germany-sides-with-turkey-not-greece-over-eus-safe-program/>.

consistency in how the Union acts, and the inconsistency carries a strategic price: sustained over time, a defence community that keeps a major ally outside its core projects risks loosening its hold on that ally, and on the cohesion of the Western alliance, at a cost the present threat can ill afford.

This is why an associate arrangement would serve the Union and not only Türkiye. A clear, rule-based route for connecting an ally to the defence effort, and especially a route that does not turn on unanimity, would let the majority act on its strategic judgement without being held to the pace of the most reluctant, and would lessen the temptation to reach for contested emergency powers in order to move at all. Settling Türkiye's status, in other words, is partly a way for the Union to settle a tension within itself. The closing section turns to why the present moment makes that worth attempting.

## CONCLUSION

The larger question does not go away. Türkiye's candidacy for Union membership, and the long list of political conditions attached to it, sit where they have sat for years, and nothing proposed here resolves them. That is precisely the point of an associate arrangement. Its purpose is not to substitute for the membership question but to stop that unresolved question from continuing to block a narrower one that is urgent, achievable, and in the interest of both sides: the connection of a capable ally to a defence effort, and the alliance taking shape around it, that already rely on it. To make the smaller step wait for the larger one is to pay a mounting price for a sequencing that serves no one.

The present moment makes the step worth attempting now rather than later. The external pressures that prompted Europe's rearmament have not eased, the architecture of that rearmament is still being designed and so is still open to shaping, the Canada agreement has freshly shown that a non-member can be brought a long way inside, and a clear majority of member states already favours drawing on Turkish capacity. The timing is pointed in another way as well. Türkiye will host the NATO summit in Ankara on 7 and 8 July 2026,<sup>34</sup> and its role within the alliance is deepening rather than receding, with Turkish command of NATO's Allied Reaction Force due from 2028.<sup>35</sup> The order that will govern European security for the next generation is being written now, and the cost of being absent from the drafting is greater than the cost of any single contract foregone. And the deeper risk runs the other way as well: an ally kept outside the alliance it is helping to build may, in time, drift from it, and for Europe that would be the

34 "Türkiye to Host 2026 NATO Summit in Ankara", *NATO*, 20 August 2025, accessed June 22, 2026, <https://www.nato.int/en/news-and-events/articles/news/2025/08/20/turkiye-to-host-2026-nato-summit-in-ankara>.

35 "Türkiye to Command NATO's Allied Reaction Force from 2028", *Türkiye Today*, accessed June 22, 2026, <https://www.turkiyetoday.com/nation/turkiye-to-command-natos-allied-reaction-force-from-2028-3217892>.

costliest outcome of all, dearer than any contract and dearer than the rearmament it is now financing.

The argument is not that one side is right in the underlying disputes; it is that the present settlement serves no one well, including those who maintain it. A freeze that raises Europe's costs, slows its rearmament, and leaves a capable ally outside the tent is a poorer outcome than an arrangement built with proper safeguards, one that addresses the genuine disputes directly rather than displacing them onto the whole of defence policy.

There is a final point, and it is the one most worth holding onto. Even if the fullest version of the arrangement proves out of reach, the effort to build it is not wasted. Assembling the coalition, negotiating the safeguards, standing up the mechanism: each of these is itself a form of integration, deepening the very ties it seeks to formalise. The pursuit of a SAFE-plus arrangement is not a wager that pays only on complete success. The process is already the reward, because every step towards it binds Türkiye and European defence more closely together. Seen this way, engagement carries no real downside. Whatever the institutional endpoint, moving towards it is movement in the right direction, and that, for both Türkiye and Europe, is not a loss but a gain.

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# Beyond a Costly Exclusion: A SAFE-plus Arrangement for Türkiye and European Defence

Murat Yeşiltaş, Başar Baysal

Europe's rearmament push has exposed a structural contradiction at the heart of EU defence policy: Türkiye holds one of the continent's most capable militaries, supplies artillery, drones, and air defence systems to more than a dozen European states, and yet sits outside every major EU defence instrument, including SAFE, PESCO, and the European Defence Fund. The exclusion does not follow from the rules, which already allow the integration the Canada agreement proves possible; it follows from a political veto held by a small number of member states, principally Greece and the Greek Cypriot administration, over bounded bilateral disputes. European capitals that resist Türkiye's institutional inclusion at the Brussels level are simultaneously signing major contracts with Turkish firms at the national level, a contradiction that grows harder to sustain as Turkish defence exports pass \$10 billion and five Turkish firms enter the SIPRI Top 100. This analysis proposes a SAFE-plus arrangement: a defined associate status connecting non-EU NATO allies to the EU defence effort, reachable either by assembling existing legal instruments (EDA arrangement, PESCO entry, SAFE participation agreement on the Canada template) or by building an intergovernmental mechanism outside the treaty framework that bypasses unanimity. With Türkiye hosting the NATO Ankara Summit and set to command the Allied Reaction Force from 2028, the architecture of European security is still open to shaping, but the window is closing.



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