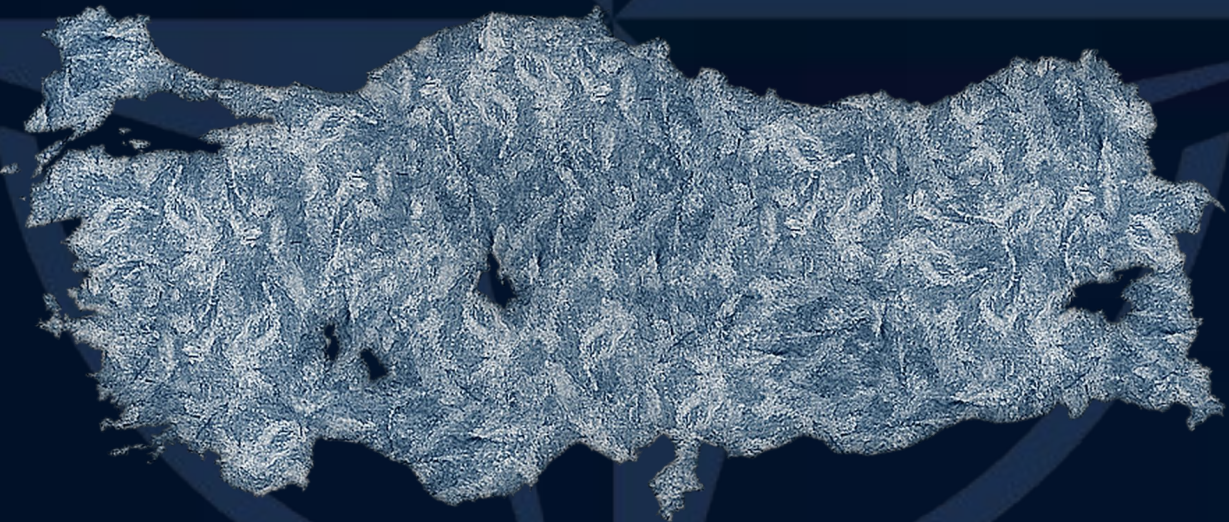




TURKEY

NATO Country Assessment — *TIER THREE* —

MIDDLE EAST BASING • RUSSIAN ARMS PURCHASES • ENGAGING THE ENEMY



JULY 2026



TIER 3

Lagging Ally



AT A GLANCE

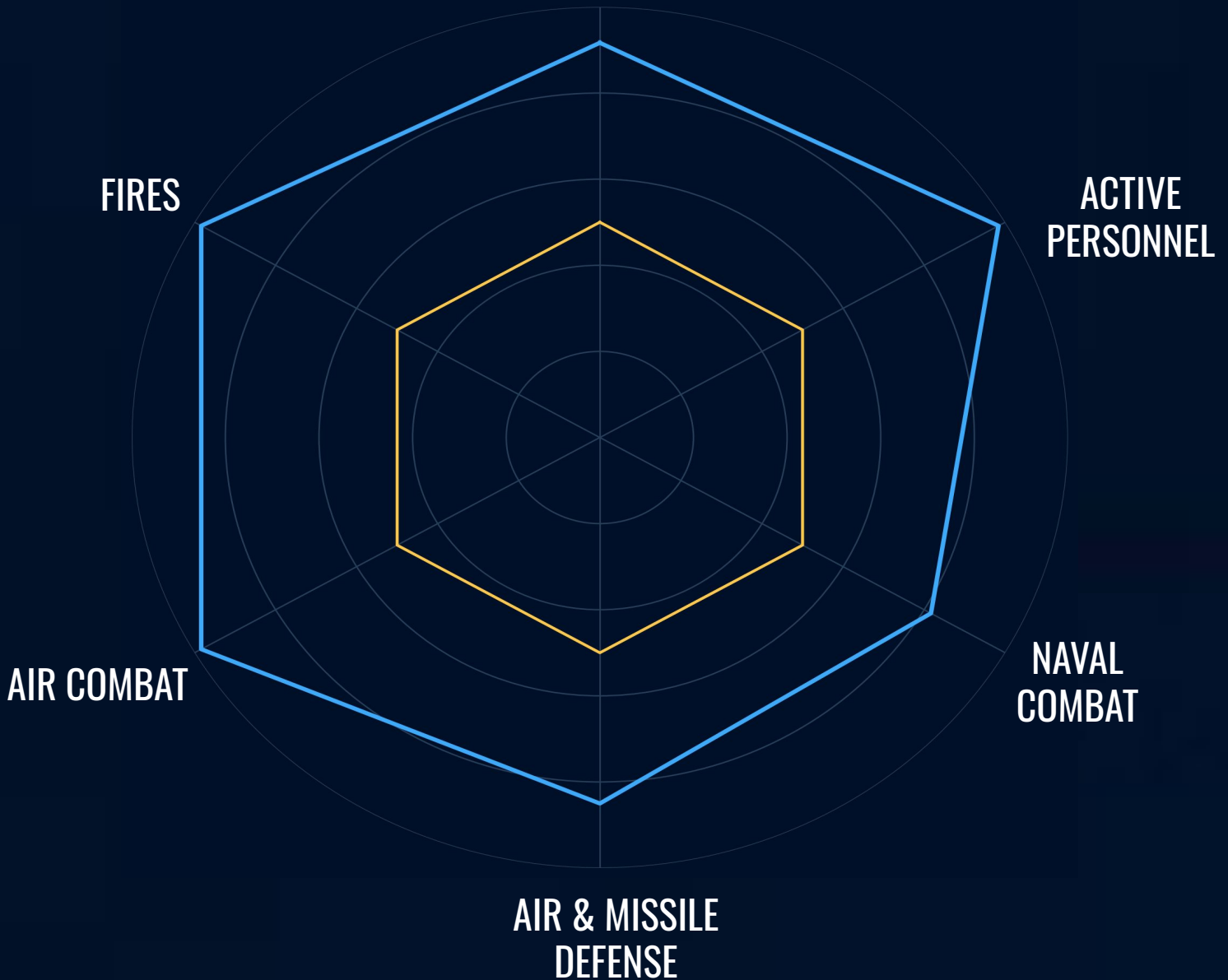
Toplines

- **Foundational Basing Providing Critical Power Projection Capability:** Incirlik Air Base, the Kürecik BMD radar, and NATO Allied Land Command at İzmir form a vital southeastern anchor for US and allied operations across the Mediterranean, Middle East, and Central Asia.
- **Russian Arms Purchases That Jeopardize American and NATO Security:** The Russian S-4000 air-defense systems in Turkish inventory prevents networking into NATO's integrated air and missile defense architecture, dramatically undermining shared security.
- **Engaging the Enemy:** Erdoğan has maintained close and friendly ties with Putin throughout the conflict that exceeds responsible diplomatic engagement. NATO Secretary General Rutte has publicly called this out in language widely understood as directed at Ankara.



FORCE STRUCTURE AT A GLANCE

LAND COMBAT



AIR & MISSILE
DEFENSE

— TURKEY
— NON-US NATO MEDIAN

This radar chart compares a country's force structure to the Non-US NATO median (data from IISS's 2026 Military Balance) across six capability areas: Land Combat (tanks, IFVs), Active Personnel (total active-duty troops), Naval Combat (submarines, destroyers/frigates/corvettes), Air & Missile Defense (long/medium-range SAM systems), Air Combat (4th-gen+ combat aircraft), and Fires (artillery, rocket launchers). Scores are weighted, with modern platforms counted fully and legacy platforms counted at reduced weight.

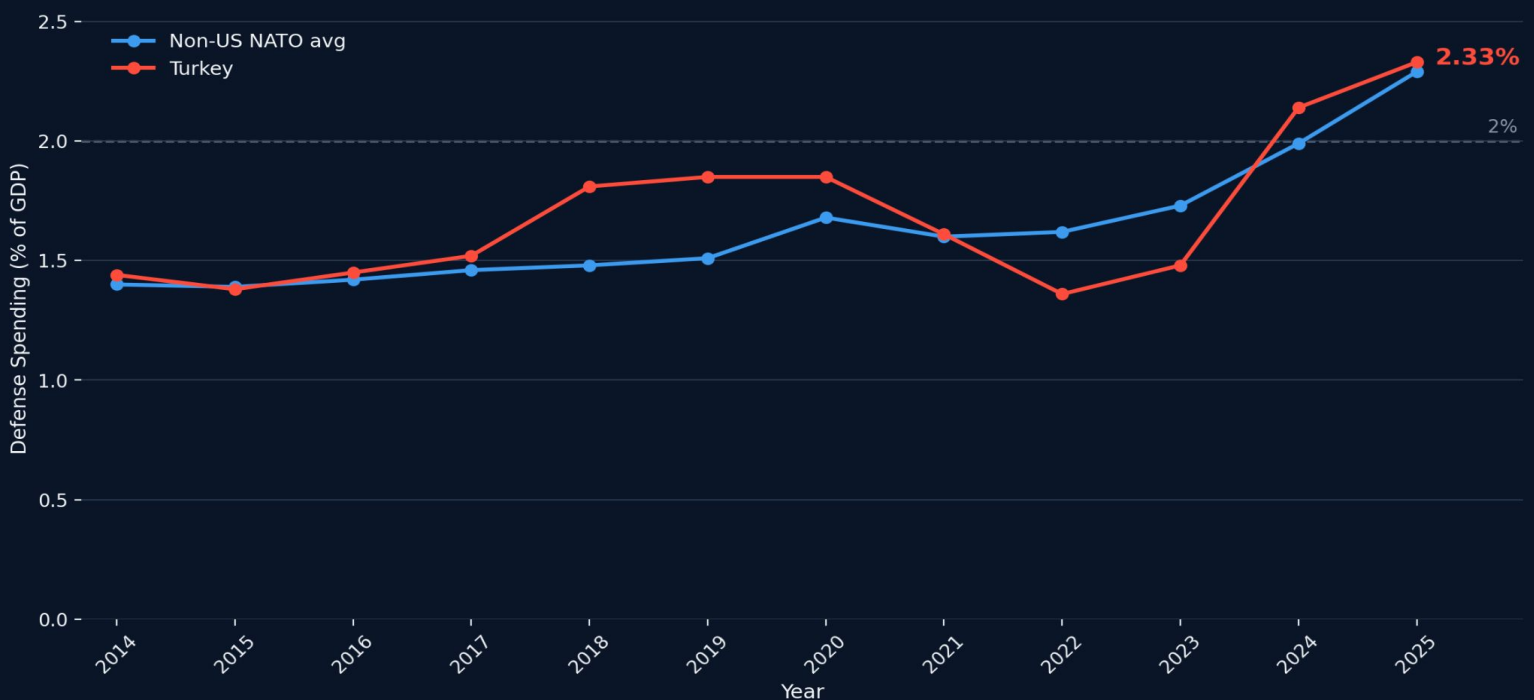


MILITARY CONTRIBUTIONS

Defense Spending Level

Turkey maintains NATO's second-largest military after the United States. Turkey's [defense spending](#) reached 2.33% of GDP in 2025, above the NATO floor and consistently above the alliance non-US average for most of the past decade. Projections of 2.83% in 2027 and 3.2% in 2028 reflect genuine upward trajectory backed by budget commitments rather than accounting adjustments. Turkey backed the Hague 5% framework and will host the 2026 NATO Summit in Ankara, assuming command of NATO's [Allied Reaction Force](#) from 2028. For NATO's second-largest military, the combination of above-floor spending and indigenous production depth makes Turkey's defense investment story structurally different from most European allies.

Turkey — Defense Spending as % of GDP, 2014-2025

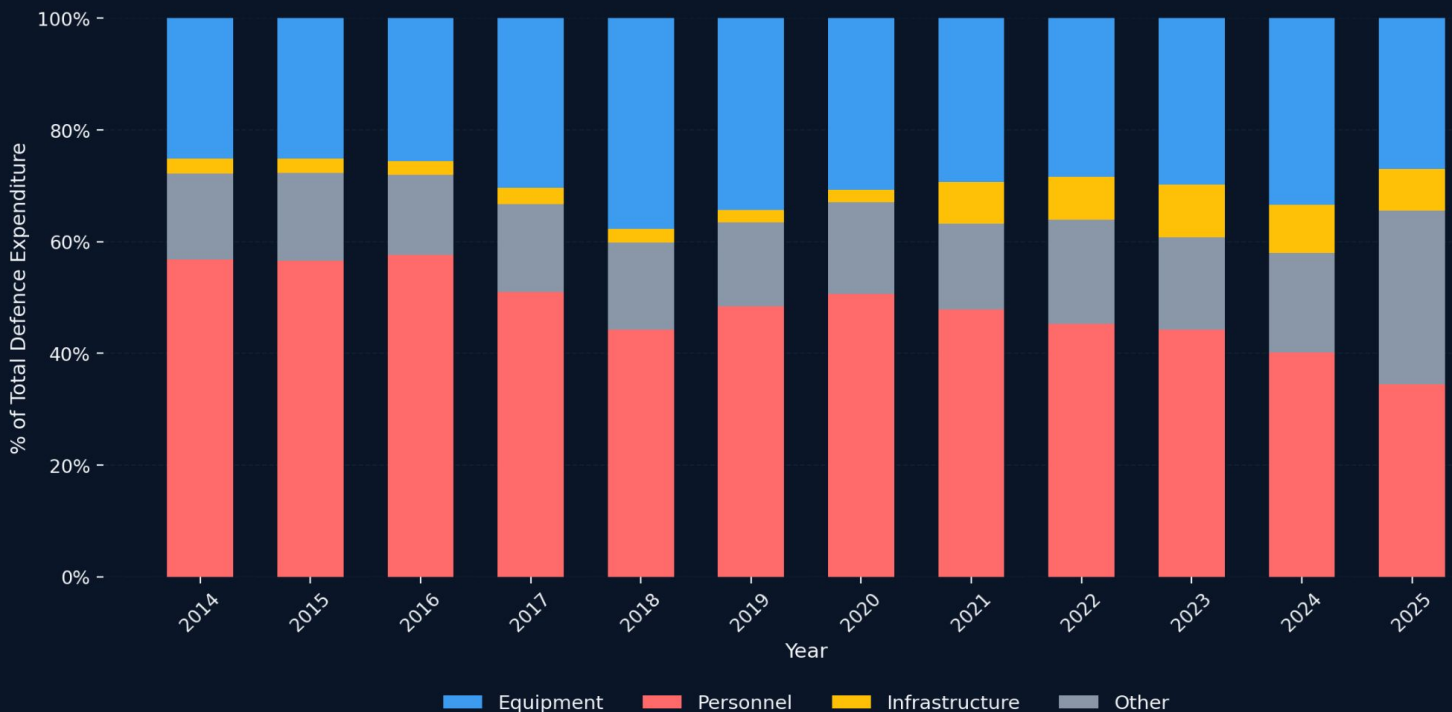


MILITARY CONTRIBUTIONS

Equipment Share

Turkey's [equipment share](#) reflects an economy investing heavily in domestic platform production rather than foreign procurement. Turkey's equipment share has risen from ~16% in 2014 to ~35% by 2025, reflecting deliberate investment in domestic platform production. Turkey has [increased domestic defense](#) production from roughly 20% to 80% of military equipment over two decades through systematic industrial policy. The \$2.3B F-16 Block 70 procurement in 2024 is the only significant recent foreign acquisition—virtually everything else flows through Baykar, ROKETSAN, ASELSAN, and TAI. The S-400 acquisition remains the most consequential equipment decision, creating NATO interoperability failure in air defense that no subsequent domestic investment has resolved and that continues to exclude Turkey from F-35 program participation.

Turkey — Defence Expenditure by Category, 2014-2025



MILITARY CONTRIBUTIONS

Manpower & Recruitment

Turkey's [personnel cost share](#) has fallen from ~57% in 2014 to ~35% by 2025 as equipment investment has grown. Active personnel have risen sharply—from ~425,000 in 2014 to ~500,000 by 2025—making Turkey NATO's second-largest military by headcount after the United States. Turkey maintains conscription, with mandatory service providing the recruitment base for a force of this scale. Sustaining 500,000 active personnel while simultaneously funding a comprehensive domestic defense modernization program creates competing budget pressures. Turkey's [large conscript-based](#) ground force limits the degree of professionalization achievable at scale. The sheer size of the force means average training standards and equipment quality per soldier are lower than smaller all-volunteer allies, even as the high-end units and special operations forces are genuinely capable. Whether Turkey can sustain force expansion while also delivering the equipment modernization agenda is the central personnel-quality challenge.

Turkey — Personnel Cost Share & Active Personnel, 2014-2025



MILITARY CONTRIBUTIONS

Capability Modernization

Turkey's [modernization strategy](#) prioritizes domestic production and strategic autonomy over NATO interoperability—a deliberate choice that undermines the alliance. On combat aircraft, 240 F-16s form NATO's largest non-US tactical air fleet, with 40 new Block 70s approved in 2024 and the indigenous KAAN fifth-generation program progressing toward service entry. On UAVs, the TB2, TB3, and jet-powered stealth Kızılelma represent genuine generational leadership in unmanned combat aviation. On air defense, the S-400 in inventory remains NATO's most serious interoperability problem; the domestic Steel Dome architecture partially compensates but does not resolve it. On naval forces, Turkey operates a substantial surface and submarine fleet across the Aegean, Black Sea, and Eastern Mediterranean. On ground forces, the army is large, combat-experienced, and organized for high-intensity conventional warfare with no European parallel in operational depth. The ALTAY MBT program represents long-term armor modernization.



MILITARY CONTRIBUTIONS

Force Posture

Turkey's force posture combines critical NATO hosting infrastructure with an active deployed military presence across multiple theaters. [Incirlik Air Base](#) hosts US nuclear weapons under NATO sharing arrangements and serves as the critical logistics hub for Mediterranean and Middle Eastern operations—one Iranian missile was intercepted in its vicinity during the 2026 Iran crisis. The [Kürecik BMD radar](#) in Malatya Province is central to NATO's Iran missile-warning architecture and became operationally critical during Operation Epic Fury. NATO Allied Land Command at Izmir hosts a major alliance land-domain command node. Beyond hosting, Turkey maintains active military deployments in Syria, Iraq, Libya, and Qatar, and a persistent naval presence in the Eastern Mediterranean. Turkey invoked the Montreux Convention after February 2022 to [restrict Russian naval reinforcement](#) through the Bosphorus—one of the most consequential single operational decisions of the war's early period. Turkey contributes to NATO's Multinational Battlegroup Bulgaria and assumes command of NATO's Allied Reaction Force from 2028.



MILITARY CONTRIBUTIONS

Industrial Base

Turkey has transformed its [defense industrial base](#) more dramatically than any NATO ally over the past two decades, [growing domestic production](#) from 20% to 80% through deliberate industrial policy. Baykar's TB2 is the world's most combat-proven armed drone, exported to dozens of countries including NATO allies. ROKETSAN produces missiles and rocket artillery; ASELSAN provides defense electronics and communications; TAI is developing KAAN. Turkey has become a [significant defense exporter](#) to other NATO members, giving it industrial influence within the alliance alongside strategic autonomy. Baykar's planned drone production facility in Ukraine would extend Turkish defense-industrial reach directly into Ukraine's military production architecture. On raw materials, Turkey holds significant deposits of boron—controlling roughly [70% of global reserves](#)—a critical material for defense applications including nuclear shielding and high-strength alloys, giving Turkey meaningful strategic leverage in defense-relevant critical minerals.



STRATEGIC ALIGNMENT

Declared Posture

Turkey's [2025 Red Book update](#) broadens its national security concept to economy, energy, and AI, consistent with Ankara's wider [strategic autonomy](#) drive—an outlook that explicitly resists total NATO alliance alignment. Turkey formally endorses NATO collective defense and the Hague framework, but its declared postures on Russia, China, and Iran diverge from alliance consensus in ways that are deliberate rather than incidental. On Russia, Turkey's doctrine simultaneously acknowledges Russian aggression and frames Turkey as an indispensable mediator and economic partner. On China, Turkey's SCO dialogue partnership and BRI Middle Corridor alignment reflect a declared strategic preference for Eurasian positioning over Western alignment. On Iran, Turkey's self-declared role as regional stabilizer and de-escalation intermediary positions Ankara closer to Tehran than any other NATO allies—a posture that sat uncomfortably alongside Iranian missiles intercepted over Turkish territory in 2026.



STRATEGIC ALIGNMENT

Ukraine Support

Turkey is [not tracked by Kiel](#) in any meaningful way—€0.071B allocated, just 0.010% of GDP—because Turkey’s most consequential contributions have been structured as commercial sales or diplomatic actions rather than state military aid, deliberately avoiding the transparency frameworks that govern allied assistance. [Bayraktar TB2 drones](#) were among the most consequential early-war Ukrainian weapons, delivered commercially through Baykar rather than government-to-government aid. The Montreux Convention closure limiting Russian Black Sea Fleet reinforcement was potentially the single most strategically significant Turkish action for Ukrainian survival in the early war. Co-mediating the [Black Sea Grain Initiative](#) enabled Ukrainian agricultural exports at a critical juncture. Baykar’s planned Ukraine drone production facility would embed Turkish defense technology permanently in Ukrainian military production. Against this, Turkey has not joined EU or G7 sanctions on Russia, and formal bilateral aid remains near the bottom of the alliance distribution. Turkey’s Ukraine contribution is real and consequential in specific domains.



STRATEGIC ALIGNMENT

Russian Decoupling

Turkey has the most significant Russian energy dependence in NATO outside Slovakia and Hungary, compounded by Rosatom nuclear construction. [Russia supplies](#) roughly 40% of Turkish natural gas through Blue Stream and TurkStream, and became a larger oil and refined-products supplier after 2022. [Akkuyu nuclear power plant](#)—built, owned, and operated by Rosatom—creates the deepest Russian nuclear infrastructure footprint inside NATO territory, giving Moscow structural leverage over Turkish energy security for decades. Turkey has not pursued decoupling and has explicitly used its energy-hub position to preserve autonomy. Turkish firms have been sanctioned by US authorities for Russia-related evasion, and Turkey has not joined any EU or G7 sanctions package—providing an alternative economic channel for Moscow.

Russia-Turkey gas pipeline plans

Moscow and Ankara seek to develop Turkey as a transit route for Russian gas to Europe, avoiding Ukraine



STRATEGIC ALIGNMENT

Public Support & Political Resilience

Turkey recorded 69% for staying in [NATO in 2024](#), 64% feeling more safe from NATO cooperation, and 61% agreeing the country should defend another NATO ally, solid aggregate figures that mask substantial volatility in underlying attitudes. The [Metropoll March 2026 survey](#) found 68% of Turks favoring neutrality in the US-Iran conflict, and the [ANK-AR May 2026 survey](#) found only 26% of Turks viewed NATO membership as beneficial, with a plurality saying “neither beneficial nor harmful.” The AKP government under Erdoğan formally maintains NATO membership while pursuing a strategically autonomous foreign policy: blocking member accessions as leverage, maintaining economic ties to Russia despite sanctions, and positioning Turkey as an indispensable mediator rather than a reliable front-line ally. The CHP and İYİ Party are broadly more pro-Western and show higher NATO approval among their supporters than AKP voters, while HDP/DEM is the most critical of NATO operational commitments. Turkish public support for the alliance is better characterized as conditional and instrumental than principled, making Turkey’s behavior in any serious Article 5 scenario the most unpredictable of any formal ally.



STRATEGIC ALIGNMENT

Hedging Behavior

Turkey's hedging behavior is the most concerning in the alliance. The Russian [S-400 acquisition](#) is the clearest adversary-procurement case inside NATO. While Trump signaled a willingness to lift sanctions, Congress will also have a [say](#) in the future of any F-35 sales. Erdogan has maintained [direct Putin engagement](#) throughout the war, a sustained wartime Moscow relationship that exceeds any other NATO ally. On China, Turkey's BRI Middle Corridor memorandum and SCO dialogue status represent real exposure. NATO Secretary General Rutte has repeatedly pressed Turkey on S-400 disposal and sanctions alignment, stating publicly that allies must ensure their actions do not undermine the alliance's collective posture—language widely understood as directed at Ankara. The aggregate hedging profile is bleak: no other member combines S-400 ownership, Rosatom nuclear dependency, sanctions non-participation, and sustained adversary diplomatic engagement simultaneously.



STRATEGIC ALIGNMENT

Operational Cooperation

Turkey is an incredibly complicated partner for operational support. [Turkey contributed substantially](#) to both Iraq and Afghanistan, providing troops, logistics, and basing access across both campaigns. Incirlik Air Base was central to US and coalition operations throughout both wars and remains one of NATO's most operationally critical installations. Kürecik's BMD radar is the irreplaceable sensor for Iranian ballistic missile warning on the Middle East threat axis. Turkey's Montreux Convention closure after February 2022 restricting Russian naval reinforcement through the Bosphorus was one of the most consequential single operational decisions of the war. Against this, Turkey's Syria and Iraq operations have created [recurring US policy friction](#)—most significantly the 2019 [Operation Peace Spring](#) incursion into northeastern Syria, which prompted US Congressional sanctions threats and led to a US troop withdrawal from the area, disrupting counter-ISIS operations. S-400 incompatibility means Turkey's air defense cannot be networked into NATO's integrated air and missile defense architecture, a persistent operational liability at the alliance's southeastern flank.

