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ANKARA NATO SUMMIT: FROM DIPLOMATIC VISIBILITY TO CONCRETE POLICY OUTCOMES

EVALUATION NOTE

The NATO Summit held in Ankara on 7–8 July 2026 served as a major diplomatic platform with important implications for Türkiye's position within the Alliance and the future course of Türkiye–US defense relations. Bringing together the heads of state and government of all 32 NATO members, the summit marked more than just Türkiye's second time hosting a NATO summit, following the 2004 Istanbul Summit. It also reflected a broader moment in which both the evolving security architecture and Türkiye's strategic role within it were being reassessed (NATO, 2026d; Reuters, 2026c).

The 22-year period between the Istanbul and Ankara summits illustrates the profound transformation of NATO's security agenda. The 2026 Ankara Summit took place at a time when the Russia–Ukraine war was continuing, tensions in the Middle East were escalating, and debates over burden-sharing among allies were intensifying (Kibaroglu, 2025; Reuters, 2026i). Coming immediately after the United States launched a large-scale attack on Iran, the summit also became a platform where both external security threats and internal divisions within the Alliance became more visible (CNN, 2026; France 24, 2026).

For Türkiye, the Ankara Summit was less a meeting expected to produce immediate results than a platform for medium-term negotiations on critical issues such as the F-35/CAATSA dispute, engine procurement for the KAAN fighter aircraft, restrictions on the defense industry, counterterrorism, and Black Sea security. The summit's lasting impact will therefore depend less on the diplomatic visibility generated by hosting

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the event than on whether it leads to concrete, time-bound, and measurable progress in these areas.

From NATO's perspective, the summit's main priorities were increasing defense spending, strengthening defense-industrial capacity, maintaining support for Ukraine, and reinforcing the Alliance's 360-degree approach to deterrence. For Türkiye, the main agenda items included the defense and security issues outlined above, with particular emphasis on the future of the F-35 and the CAATSA process. In this regard, the S-400 issue, the CAATSA sanctions currently in force, and the position of the US Congress remain decisive.

1. The Significance of the Ankara Summit for NATO

It would be misleading to interpret the Ankara Summit solely through individual agenda items. Its broader significance lies in whether NATO can develop an institutional response to the emerging security paradigm. Referred to in discussions surrounding the summit as "NATO 3.0," this approach is not an official NATO doctrine but an analytical framework for understanding adaptation and burden-sharing (National Intelligence Academy, 2026). Within this framework, collective defense is once again at the center of the Alliance's mission, while deterrence and resilience are no longer measured solely by defense spending. Instead, they are assessed through an integrated architecture encompassing defense-industrial production, cybersecurity, air and missile defense, and critical infrastructure (National Intelligence Academy, 2026; NATO, 2022).

The summit's most visible issue was defense spending. This debate took on a new dimension with the commitment adopted at the 2025 Hague Summit to reach a target of 5 percent of gross domestic product by 2035. The commitment includes at least 3.5 percent for core defense requirements and NATO capability targets, and up to 1.5 percent for broader security-related investments, including critical infrastructure, resilience, innovation, and the defense-industrial base (NATO, 2026a). This distinction is particularly important for Türkiye, as the second category explicitly includes strengthening the defense-industrial base. According to NATO data, defense investment by European Allies and Canada increased in 2025 by approximately USD 139 billion in nominal terms and by more than USD 90 billion at 2021 prices (NATO, 2026a). The central issue, however, is not the overall level of spending but whether these resources can be converted into effective military capabilities. The Russia–Ukraine war has demonstrated how rapidly stockpiles can be depleted during prolonged, high-intensity conflict and has exposed serious European capacity gaps in ammunition, air defense, and logistical resilience (National Intelligence Academy, 2026; Reuters, 2026b).

As Kibaroglu (2025) notes, the United States' "America First" orientation and its pressure for greater burden-sharing have encouraged European Allies to increase their defense budgets. This development points to a division of responsibilities that extends beyond traditional burden-sharing, with conventional defense increasingly shifting towards European Allies. Under this approach, the role of the United States does not disappear; rather, Washington increasingly concentrates on nuclear deterrence, strategic intelligence, and global power projection, while responsibility for conventional defense is progressively transferred to Europe (National Intelligence Academy, 2026). This transition must be managed without creating a deterrence gap, as the US military presence represents not only a source of operational capacity but also a political security guarantee, particularly for Allies on NATO's eastern flank. The key test for the summit in this area is therefore not whether NATO allocates more resources, but whether it can transform those resources into sustainable military capabilities.

2. The Türkiye–US Track: Conditional and Limited Normalization

The summit's most significant outcome for Türkiye was the prospect of a conditional normalization in Türkiye–US defense relations. The bilateral meeting between President Recep Tayyip Erdoğan and US President Donald Trump at the summit's opening signaled a willingness to normalize relations between the two countries. The limits of such a normalization, however, remain clear. Although the F-35 issue, CAATSA sanctions, the S-400 dispute, and engine procurement for the KAAN fighter aircraft are governed by separate legal and institutional processes, they constitute an interconnected set of issues at the political level (Associated Press, 2026; Reuters, 2026c, 2026d).

2.1. The F-35, CAATSA, and the S-400

Türkiye joined the F-35 Joint Strike Fighter Program as a partner in 2002 and assumed production and procurement responsibilities under the program. Türkiye was initially expected to procure 100 F-35 aircraft (Kıbaroğlu, 2025; Reuters, 2026h). However, Türkiye's acquisition of the Russian S-400 air defense system in 2019 marked a major rupture in relations, as the United States and other allies regarded the decision as incompatible with the Alliance. Türkiye was subsequently removed from the F-35 program and subjected to sanctions under the Countering America's Adversaries Through Sanctions Act (CAATSA).

The Erdoğan–Trump meeting produced more forward-leaning messages on this issue than had been expected. Speaking alongside Erdoğan on 7 July, President Trump stated that sanctions on Türkiye would be lifted and that a decision on Türkiye's return to the F-35 program would be made shortly (Al Jazeera, 2026; Reuters, 2026e). Compared with previous positions, this statement represented a notable step forward.

However, the statement does not mean that the issue has been resolved. The first obstacle to the sale is the legal conditions set out in Section 1245. Two separate legal mechanisms must be distinguished in this regard. Although the statutory restriction on the transfer of F-35 aircraft and the sanctions imposed under CAATSA are based on different legal grounds, the two processes are politically interconnected through the S-400 issue. The restriction on the transfer of F-35 aircraft is established under Section 1245 of the National Defense Authorization Act for Fiscal Year 2020. The provision requires the US Secretaries of Defense and State to submit a written certification to Congress before any transfer can proceed. The certification must document three conditions. First, Türkiye must no longer possess the S-400 system or any related equipment, and no associated personnel may remain in the country. Second, it must provide credible assurances that it will not reacquire or accept the system in the future. Third, it must not have acquired any additional Russian defense equipment after 31 July 2019 that could compromise the security of the F-35. The Secretaries of Defense and State may waive the relevant restriction only 90 days after the certification has been submitted to Congress (US Congress, 2019). These conditions directly support the central argument of this policy note: political will at the leadership level is not sufficient on its own, because the process is tied to verifiable and reviewable requirements.

CAATSA sanctions constitute a separate legal regime. Imposed on the Presidency of Defence Industries in December 2020, these measures include a ban on export licenses, restrictions on loans and Export-Import Bank financing, and asset freezes and visa restrictions targeting senior officials of the institution (US Department of State, 2020). During the summit, US Vice President JD Vance stated that a review was underway to determine whether Türkiye had complied with the relevant legal requirements and that certain matters would need to be

formally documented (Reuters, 2026e). His remarks demonstrate that the process depends not only on political will but also on administrative and legal certification.

According to media reports, one of the proposals that has gained prominence in recent weeks is the transfer of the S-400 system to a third country. No agreement has yet been reached, however, and Russia's end-user requirements for arms sales have cast doubt on the feasibility of such a transfer (Reuters, 2026e). The S-400 issue has therefore evolved from a political choice into a search for a technically and legally viable solution.

The second obstacle to the sale comes from Congress. Ahead of the summit, a bipartisan group led by Republican Mike Lawler and Democrat Brad Sherman sent a letter to Trump expressing serious concerns about the sale of F-35 aircraft. They cited US legislation, Türkiye's relations with Iran, and its rhetoric towards Israel as grounds for their opposition (Reuters, 2026e). These arguments show that the issue is not confined to the S-400 dispute and that congressional objections have made Türkiye's broader regional positioning an additional criterion of assessment. Nevertheless, congressional opposition and the ability to block the sale in practice are not the same. Under the Arms Export Control Act, Congress has a 15-day review period for arms sales to NATO allies, and blocking a sale requires the adoption of a joint resolution of disapproval (US Congress, 2008a). Given the difficulty of meeting this threshold, Congress is more likely, under the current political arithmetic, to increase the political cost for the executive branch and delay the process than to halt the sale automatically.

The third obstacle is regional. Ahead of the summit, Israeli Prime Minister Benjamin Netanyahu argued that Türkiye should receive neither F-35 aircraft nor fighter-jet engines, warning that such a move would alter the regional balance of power (Reuters, 2026e). The Israeli government has grounded its objection in the US policy of preserving Israel's qualitative military edge. Although the direct legal applicability of this principle to Türkiye remains unclear, Israel has used it as a basis for political opposition within the US Congress (US Congress, 2008b).

The F-35 and CAATSA issues, therefore, cannot be resolved solely through political agreement between the two leaders. The US Congress, sanctions legislation, and debates over the regional balance of power will continue to shape both processes. It is consequently more accurate to interpret the current trajectory not as a "potential return," but as a process of "conditional and limited normalization."

2.2. The KAAN Engine

Türkiye's domestically developed fifth-generation fighter aircraft, KAAN, is a strategic component of the country's air power modernization. However, the procurement of engines for planned serial production remains a critical issue due to continued dependence on US-origin supply chains (Reuters, 2026h). A concrete step was taken in this regard shortly before the summit. In late June 2026, the Trump administration formally notified Congress of the proposed sale of 80 General Electric F110 engines, valued at more than USD 700 million (Reuters, 2026g, 2026e). This development stood out both as an important step in the project's technical progress and as a sign of limited normalization in bilateral defense relations (Associated Press, 2026).

Compared with the F-35 and CAATSA issues, engine procurement appears to have reached a more advanced administrative stage. This process can be moved forward at the executive level and managed within the framework of congressional review. Indeed, despite objections from some members of Congress, the administration decided to proceed with the sale

(Reuters, 2026e). This distinction is not absolute, however. Netanyahu's objection also extended to the engine sale, indicating that this issue is not entirely insulated from the wider debate over the regional balance of power.

In this context, the procurement of F110 engines offers a short- to medium-term transitional solution for KAAN's initial production blocks. The development of a domestically produced engine, by contrast, remains a medium- to long-term necessity aimed at reducing dependence on foreign suppliers. Such dependence constitutes a structural vulnerability, as it makes KAAN's serial production schedule sensitive to the course of Türkiye–US relations.

2.3. Syria

Syria was another key security issue discussed in the Türkiye–US meeting. Türkiye has long emphasized that the PKK/YPG poses a threat to its national security and has called on its allies to provide concrete support in counterterrorism. The divergence on this issue stems less from a technical misunderstanding than from a structural difference in strategic priorities. According to Kibaroglu (2025), US officials have not entirely rejected Türkiye's assessment of the organic links between the YPG/PYD and the PKK in private discussions. Washington has nevertheless continued its cooperation with the group on the ground, citing the fight against ISIS. The issue, therefore, concerns not NATO's institutional definition of terrorism, but the operational and strategic divergence between Türkiye and the United States over threat priorities and acceptable local partners in Syria. This divergence has indirect consequences for trust and solidarity within the Alliance. Its essentially bilateral nature also explains why the issue has been addressed primarily through Türkiye–US talks rather than within NATO's formal agenda.

3. Regional Security Issues

Türkiye's position on regional issues reflects a continuous effort to balance its NATO membership with an independent regional diplomacy. In the academic literature, Türkiye is described as an ally navigating between concerns of "entrapment" and "abandonment." This posture is generally understood as the simultaneous pursuit of commitment to the Alliance and strategic autonomy (Akgül-Açıkmeşe & Aksu, 2024; Oğuzlu, 2012).

3.1. Iran, NATO's Southern Flank, and Türkiye's Balancing Policy

Developments concerning Iran had the greatest influence on the summit's agenda. The US military action against Iran and the reimposition of sanctions targeting Iranian oil ahead of the summit demonstrated that the meeting would not be confined to the Russia–Ukraine war and defense spending (CNN, 2026; France 24, 2026). Indeed, during the summit, President Trump criticized several European Allies for failing to support these measures (France 24, 2026; Reuters, 2026d). The Iran issue thus evolved from a regional security risk into a source of tension within the Alliance.

The Ankara Declaration reiterated that Iran must not acquire nuclear weapons and emphasized freedom of navigation through the Strait of Hormuz (NATO, 2026f). The summit also highlighted initiatives related to air and missile defense, counter-unmanned aircraft system capabilities, maritime security, and the protection of critical infrastructure. The issue of Iran was therefore addressed alongside energy security and maritime trade routes.

Türkiye adopted a balancing approach in response to these developments. This position is underpinned by economic considerations. As an economy dependent on energy imports, Türkiye would be exposed to the risk of rising global prices in the event of disruptions to oil

and liquefied natural gas shipments through the Strait of Hormuz. Such price increases could place additional pressure on the country's import bill and inflation outlook. Regional escalation could also jeopardize Türkiye's trade and transport links with the Gulf countries. Türkiye therefore continues to advocate a diplomatic solution (Reuters, 2026i; Republic of Türkiye Ministry of Foreign Affairs, n.d.).

One of the summit's notable outcomes for regional security was the move towards more operational cooperation between NATO and the Gulf countries. New flagship projects were launched in Ankara with Bahrain, Kuwait, Qatar, and the United Arab Emirates. These projects, which cover maritime security, counter-unmanned aircraft systems, defense against chemical, biological, radiological, and nuclear threats, and counterterrorism, build on the Istanbul Cooperation Initiative launched at the 2004 Istanbul Summit (NATO, 2026c). As one of the Allies geographically closest to the region, and given its production capacity in unmanned systems, ammunition, radar, and air defense, Türkiye could assume a complementary role in this cooperation.

At the same time, the growing prominence of threats originating from Iran on the Alliance's agenda could create a limited area of convergence between Türkiye and Israel. On the basis of these developments, it may be argued that the two countries have partly overlapping threat assessments regarding air and missile defense and counter-unmanned aircraft system capabilities. There is not yet sufficient evidence, however, to conclude that this overlap will translate into direct bilateral military cooperation. Nor does such convergence eliminate the political and military competition between the two countries.

Syria, the Eastern Mediterranean, and Gaza constitute separate arenas of competition in Türkiye-Israel relations. The institutional manifestation of this competition is evident in defense procurement issues. Israel's opposition to Türkiye's re-entry into the F-35 program demonstrates that partly overlapping security concerns regarding Iran have not brought military-capability competition to an end. Indeed, the congressional letter of objection cited Türkiye's relations with Iran and its rhetoric towards Israel among the grounds for opposing the sale (Reuters, 2026e). Türkiye's regional positioning has therefore become one of the variables affecting the course of defense procurement processes. While this position provides Türkiye with space for an independent diplomatic approach, it also increases the political cost associated with these procurement issues.

Türkiye's approach to Iran nevertheless differs from that of Israel. Ankara supports preventing Iran from acquiring nuclear weapons and strengthening defensive capabilities against missile, unmanned aerial vehicle, and maritime security threats originating from Iran. At the same time, a weakening of state capacity in Iran or an uncontrolled escalation of the conflict could pose serious risks for Türkiye in terms of irregular migration, border security, energy supplies, and trade routes.

3.2. Ukraine and Black Sea Security

The Russia-Ukraine war remains one of NATO's foremost priorities. The summit addressed support for Ukraine, the European security architecture, and deterrence on the Alliance's eastern flank (NATO, 2026f; Reuters, 2026d). Since the beginning of the war, Türkiye has supported NATO decisions while simultaneously keeping diplomatic channels open with both Russia and Ukraine and assuming a mediating role. The Black Sea Grain Initiative provided a concrete example of this role (Republic of Türkiye Ministry of Foreign Affairs, n.d.).

Türkiye's main strategic weight in this issue, however, lies in Black Sea security. Owing to the Montreux regime and its geographical position, Türkiye is one of the few Allies capable of simultaneously monitoring developments on NATO's eastern and southern flanks. This capacity directly contributes to the Alliance's ability to assess interconnected crisis areas in parallel (Güvenç, 2015; National Intelligence Academy, 2026). Türkiye's ability to manage the eastern and southern flanks not as competing priorities but as complementary security domains lies at the heart of its strategic added value within the Alliance.

4. Reading the Ankara Summit Declaration from Türkiye's Perspective

The Ankara Summit Declaration issued after the summit can be assessed from Türkiye's perspective under five headings. The first is collective defense. The Allies reaffirmed their commitment to Article 5 of the Washington Treaty and NATO's 360-degree approach to deterrence (NATO, 2026f).

The second is terrorism. The declaration states that terrorism remains one of the Alliance's principal security threats. This carries diplomatic significance for Türkiye by maintaining an issue that Ankara has long identified as a key priority (NATO, 2026f; Reuters, 2026a).

The third is the defense industry. The Declaration expresses a shared commitment to expanding production capacity and strengthening the defense-industrial base. New capability procurement agreements worth more than EUR 50 billion in total were announced at the summit, alongside the "Drone Edge" initiative, which envisages USD 40 billion in investment in unmanned and counter-unmanned systems over five years (NATO, 2026e). The Allies also committed to removing barriers to defense trade among themselves (NATO, 2026f; Reuters, 2026d). This commitment is consistent with Türkiye's objections to restrictions on its defense industry, while the Drone Edge initiative directly corresponds with Türkiye's production capacity in unmanned systems.

The fourth is Ukraine and the Black Sea. The Allies agreed to maintain their support for Ukraine. According to the communiqué, approximately EUR 70 billion in military assistance will be provided in 2026, and the Allies aim to sustain at least the same level of support in 2027 (NATO, 2026f; Reuters, 2026d).

The fifth heading is regional security. In the final paragraph of the Declaration, the Allies reaffirmed that the Alliance would continue adapting to the strategic competition, widespread instability, hybrid threats, and recurring shocks shaping the broader security environment. The same paragraph reiterated that Iran must never acquire nuclear weapons and called on Iran to fully respect freedom of navigation through the Strait of Hormuz (NATO, 2026f).

Compared with previous summit declarations, this language points to a new trend. The five-paragraph 2025 Hague Summit Declaration did not refer to Iran, the Middle East, or the southern flank, focusing exclusively on the threats posed by Russia and terrorism (NATO, 2025). The longer 2024 Washington Summit Declaration did address Iran, but largely in relation to its military support for Russia (NATO, 2024). Although similar in length to the Hague Declaration, the Ankara Declaration defines Iran directly within a regional and maritime security framework. Its references to nuclear proliferation and the Strait of Hormuz are concrete indicators of this shift.

For Türkiye, this change has two implications. On the one hand, the declaration brings Türkiye's concerns regarding energy supply security onto the Alliance's agenda. On the other hand, its language does not fully align with Türkiye's more balanced approach towards Iran. A

summit hosted by Türkiye therefore produced a text that sharpened the Alliance's definition of regional threats. This illustrates that Türkiye's effort to balance regional diplomacy with Alliance solidarity is being pursued within an increasingly constrained space.

President Erdoğan also stressed the need to remove restrictions on the defense industry and argued that excluding non-EU Allies from European defense initiatives was incompatible with Alliance solidarity (Reuters, 2026a). This objection reflects a structural problem. As Kibaroglu (2025) explains, Türkiye is not opposed in principle to the European Union's access to NATO assets and capabilities. However, it has been reluctant to grant unconditional approval for operations conducted through decision-making processes in which it does not participate. This issue, which has remained unresolved since 1999, continues to occupy an important place on the agenda.

Erdoğan also made two further commitments. He stated that Türkiye aims to meet NATO's 5 percent defense investment commitment by 2030 and argued that domestically developed projects, particularly the "Steel Dome" air defense system, would contribute to the Alliance's deterrence (Reuters, 2026a).

4.1. Comparative Textual Analysis of Selected NATO Summit Declarations: Istanbul 2004, Washington 2024, The Hague 2025, and Ankara 2026

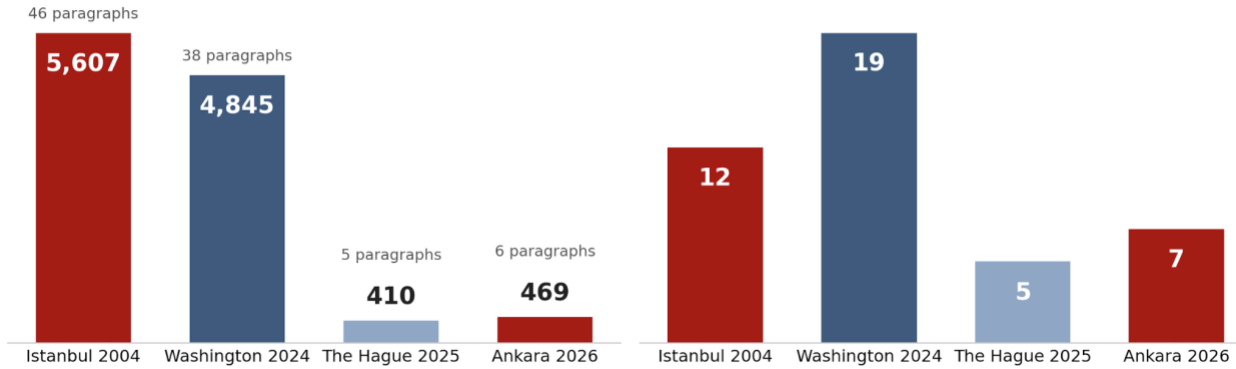
The extent to which the Declaration meets Türkiye's expectations can be assessed by examining the text itself. This section presents a word-level comparison of four selected summit declarations. The selection rests on two analytical grounds: first, to compare the two summits hosted by Türkiye, and second, to evaluate the Ankara text within the declaration format of the two summits immediately preceding it. The comparison is accordingly confined to the 2004 Istanbul Communiqué, the 2024 Washington Declaration, the 2025 Hague Declaration, and the 2026 Ankara Declaration, and does not constitute a systematic time series spanning the full history of NATO summits (NATO, 2004, 2024, 2025, 2026f). The disparity in length among the texts is stark. The Istanbul Communiqué comprises 46 paragraphs and approximately 5,600 words, while the Washington Declaration comprises 38 paragraphs and approximately 4,850 words. By contrast, the Hague Declaration consists of 5 paragraphs and approximately 410 words, and the Ankara Declaration consists of 6 paragraphs and approximately 470 words. The Ankara text is thus roughly one-twelfth the scale of the Istanbul text.

The analysis was conducted on the original English-language declaration texts published by NATO. To render the texts comparable, headings and pagination elements were excluded, and all words were converted to lowercase. Thematic densities were calculated by dividing the total number of occurrences of predefined word and word-stem clusters by the total word count per thousand words, with multi-word expressions and semantically ambiguous usages manually checked within the text. The study is a descriptive comparison and makes no claim to statistical significance.

This contraction is not merely a stylistic preference. Summit declarations constitute the Alliance's institutional record, and subsequent summits and intra-Alliance negotiations draw upon these texts as points of reference. The marked shortening of the texts suggests that summit communication has shifted toward a narrower, more outcome-oriented format, while also indicating that the shared agenda that can be recorded in a summit declaration may itself have narrowed. That said, the narrowing of consensus is not the sole cause of this contraction. Changes to the summit communication format, the announcement of certain outcomes in

separate statements, and the avoidance of restating existing strategic documents may also have contributed to the shortening of the texts. These differences in text length and thematic diversity are summarized in Figure 1.

Figure 1. Length of selected NATO summit declarations and number of themes mentioned at least twice, 2004–2026



Source: NATO summit declarations, TEPAV calculations.

Note: The right-hand panel shows the number of the 20 defined themes mentioned at least twice in the text. The indicator is not adjusted for text length and should be interpreted as a descriptive measure of thematic diversity. Red bars indicate summits hosted by Türkiye.

Concept densities reveal where this contraction has occurred. China and the topics of climate and energy, each addressed in separate paragraphs in the Washington Declaration, do not appear at all in the Ankara text. This does not, however, indicate that NATO's related policies are no longer in force, as prior strategic documents remain in force, and these topics may be addressed in separate decision texts. The emphasis on Russia has also declined markedly, falling from 8.3 per thousand words in Washington to 2.1 per thousand words in Ankara. By contrast, two topics show increased concentration: the density of defense industry and production concepts rose from 2.5 per thousand words in Washington to 10.7 in Ankara, while the emphasis on Iran rose from 0.6 in Washington to 4.3 in Ankara. Owing to the brevity of the Hague and Ankara texts, these ratios are sensitive to individual occurrences. In the Ankara text, a single occurrence corresponds to approximately 2.1, and two occurrences to approximately 4.3; accordingly, small differences should not be interpreted as indicating strong trends. Figure 2 provides a comparative overview of these shifts in thematic density across the four summit declarations.

Figure 2. Concept density in selected NATO summit declarations, frequency of use per thousand words, 2004–2026

	Istanbul 2004	Washington 2024	The Hague 2025	Ankara 2026
Russia	0.9	8.3	2.4	2.1
Ukraine	1.8	9.1	4.9	12.8
China	–	3.1	–	–
Iran	–	0.6	–	4.3
Terrorism	5.4	2.1	2.4	2.1
Nuclear / WMD	5.5	5.0	–	4.3
Defence industry	1.4	2.5	12.2	10.7
Defence investment	0.4	2.7	26.8	14.9
Partnership / enlargement	10.2	5.4	2.4	2.1
European Union	2.1	2.1	–	2.1
Black Sea	0.2	0.8	–	–
Middle East / southern flank	3.2	1.4	–	2.1
Balkans	4.3	1.0	–	–
Afghanistan / operations	5.4	0.4	–	–
Democracy / rule of law	2.7	4.1	2.4	2.1
Innovation / technology	0.2	3.3	7.3	4.3
Cyber / hybrid	–	4.1	–	4.3
Resilience	–	1.9	4.9	2.1
Climate / energy	–	1.9	–	–
Unmanned systems	–	0.2	–	2.1

Source: NATO summit declarations, TEPAV calculations.

Note: Values are calculated relative to the total word count of each declaration. Figures in parentheses denote raw occurrence counts. A dash indicates that the relevant theme does not appear in the text at all. Theme clusters were constructed by jointly counting related terms and their derivatives. Owing to the brevity of the Hague and Ankara texts, normalized values are sensitive to individual word occurrences. Results should be interpreted as descriptive and indicative rather than conclusive.

The central finding for Türkiye lies in the placement of its own priority topics within the text. Over the 22 years between Türkiye's two hostings, the weight given to these topics in the Declaration has diminished. Counterterrorism, addressed in 2004 in a dedicated section listing measures, is mentioned in the Ankara Declaration only in a single subordinate clause. The Black Sea, which had its own paragraph in 2004 and was also addressed in detail alongside the Montreux regime in the 2024 Washington Declaration, does not appear at all in the Ankara Declaration. The Gulf outreach, meanwhile, was written into the Declaration in 2004 and

institutionalized under the name of the Istanbul Cooperation Initiative; in 2026, NATO-Gulf cooperation was announced not in the Declaration but in a separate document (NATO, 2026c).

Table 1. The place of Türkiye's priority topics in NATO summit declarations, 2004–2026

Türkiye's priority topic	Istanbul 2004	Washington 2024	The Hague 2025	Ankara 2026
Counterterrorism	Dedicated section and list of measures	Dedicated paragraph and policy document	Subordinate clause	Subordinate clause
The Black Sea and the Montreux regime	Dedicated paragraph	Dedicated paragraph, reference to Montreux	Absent	Absent
Southern flank, Middle East, and the Gulf	Dedicated section; Istanbul Cooperation Initiative launched	Dedicated paragraph, southern neighborhood action plan	Absent	Reference to Hormuz only; Gulf cooperation in a separate document
Defense industry and production	Single sentence	Dedicated paragraph and industrial capacity commitment	Dedicated paragraph	Dedicated paragraph and quantified procurement commitment
Barriers to defense trade	Absent	Subordinate clause, with the "where appropriate" qualifier	Sentence, without qualification	Sentence, without qualification

Source: NATO summit declarations, TEPAV assessment.

The defense industry is the only exception in this table. Transatlantic defense-industrial cooperation, which was mentioned in a single sentence in the 2004 Istanbul Communiqué, has evolved into a full paragraph in the Ankara Declaration that includes a quantified procurement commitment. The language on removing barriers to defense trade has similarly strengthened. Indeed, whereas the 2024 Washington Declaration referred to reducing these barriers "where appropriate," this qualification is absent from both the Hague and Ankara declarations. With respect to Türkiye's objection to restrictions on its defense industry, this represents measurable progress within the text itself.

Figure 3. Vocabulary of the two summits hosted by Türkiye, Istanbul 2004 and Ankara 2026



Source: NATO summit declarations, TEPAV calculations.
Note: The size of each word reflects its frequency of use per thousand words. Sizes are scaled to be comparable across the two panels. Terms have been translated into Turkish and grouped accordingly. As word clouds do not capture context or the relationships between concepts, they should be interpreted alongside the thematic density findings presented in Figure 2.

Figure 3 provides a visual comparison of the most prominent vocabulary used in the Istanbul and Ankara summit texts. As shown in Figure 3, the word clouds offer an exploratory comparison of the most prominent vocabulary in the Istanbul and Ankara declarations, providing a visual complement to the quantitative thematic density findings. In the Istanbul Communiqué, the most prominent concepts were partnership, operation, cooperation, terrorism, and Afghanistan, a pattern indicative of a political and operational alliance vocabulary. In the Ankara Declaration, by contrast, defense, allies, investment, procurement, and capability stand out, reflecting an industrial and financial vocabulary. The four selected declarations together allow for a comparative view of the difference between the two summits hosted by Türkiye, and of where the Ankara text stands within the shorter, outcome-oriented declaration format adopted at recent summits.

These findings support the note's central argument. Türkiye's hosting of the summit secured visibility on the agenda, but priority topics such as counterterrorism and the Black Sea did not translate into detailed, trackable commitments in the Ankara Declaration. By contrast, the language of defense industry, production capacity, and procurement has become one of the Declaration's clear centers of gravity. This does not mean that NATO no longer regards these topics as important. A more accurate interpretation is that these topics have not been translated into a strong institutional record within the Ankara Declaration's short and selective textual structure. The summit's payoff for Türkiye should therefore be sought not in the Declaration text itself, but in bilateral processes and implementation timelines.

That said, the shortening of the Declaration cannot be characterized as a one-sided loss for Türkiye. The narrowing of the threat definition preserves Türkiye's space for independent regional diplomacy. The absence of new and sharper language on China and Russia in the Ankara Declaration can be read as an element that preserves Türkiye's room for maneuver, insofar as it does not impose additional political commitments on Türkiye. The strengthened emphasis on the defense industry, meanwhile, directly serves Türkiye's position as a

producing ally. The Ankara Declaration is thus a text that is limited in terms of the institutional commitments secured by Türkiye, yet favorable along the industrial axis.

4.2. European Defense Architecture, SAFE, and Türkiye's Conditional Access

Erdoğan's objection to European defense initiatives rests on a concrete basis, namely the European Union's €150 billion SAFE (Security Action for Europe) instrument. Two levels must be distinguished here. The first is basic participation. By virtue of its candidate country status, Türkiye may participate in joint procurement under SAFE, subject to certain conditions, but cannot access SAFE loans, which are available directly only to EU member states. The second is the expanded access that could potentially be granted to the Turkish defense industry. The regulation stipulates a rule of origin for components and imposes a 35% cap on non-EU content. An additional security and defense agreement between Türkiye and the EU could allow SAFE's eligibility criteria to be applied more broadly to Turkish firms and components. How such an arrangement would affect the 35% third-country cap would depend on the scope of the agreement (European Union, 2025). Basic participation and expanded industrial access are thus not the same thing. The issue at hand is not outright exclusion, but limited and conditional access.

Ahead of the summit, EU High Representative Kaja Kallas, Enlargement Commissioner Marta Kos, and Commissioner for Internal Affairs and Migration Magnus Brunner visited Ankara. In the joint press statement, the parties reiterated their intent to improve the implementation of the Customs Union and lay the groundwork for its modernization. They also addressed the current state of the Visa Liberalization Dialogue. The parties further welcomed the gradual resumption of European Investment Bank operations in Türkiye (European Commission, 2026). The process is thus moving forward. These contacts, however, have not secured a breakthrough on the topics Türkiye has prioritized. The institutional counterpart of this picture is reflected in the European Parliament's report on Türkiye, adopted on 17 June 2026 with 381 votes in favor, 107 against, and 171 abstentions. The text affirms Türkiye's strategic importance as a NATO ally and its role in the Black Sea and the Middle East, while stating that accession negotiations cannot resume under current conditions owing to concerns over the rule of law and fundamental rights (European Parliament, 2026). What emerges is a dual structure in which deepening security cooperation is not matched by progress on the membership track. Türkiye's demand for the removal of restrictions on its defense industry should be evaluated in light of this structural divergence.

4.3. Türkiye's Defense-Industrial Capacity: A Data-Driven Overview

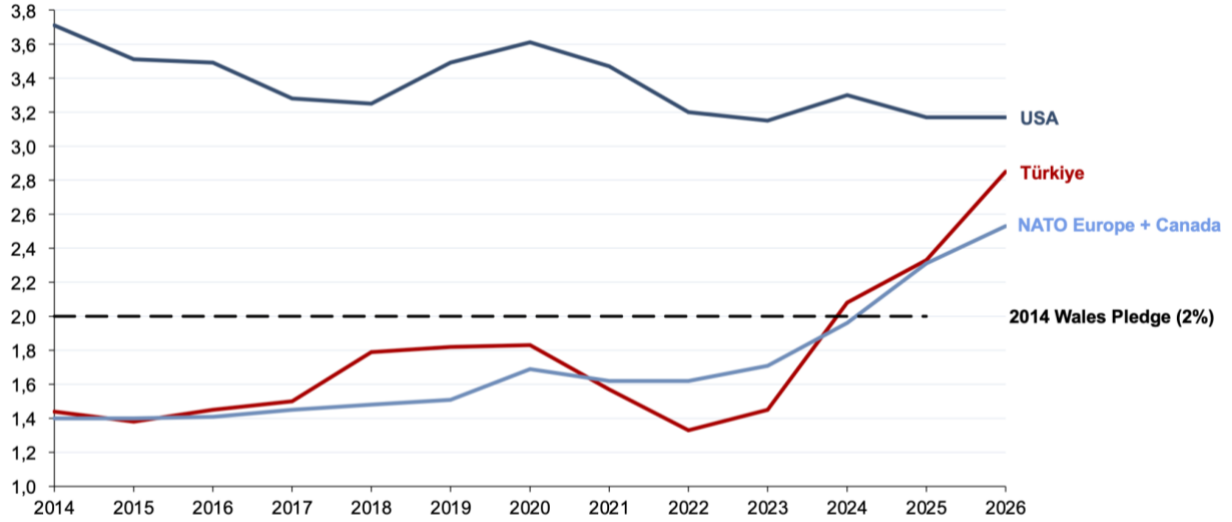
Türkiye's defense-industrial capacity constitutes the concrete basis of the "producing ally" position addressed in this note. This capacity can be assessed through several indicators: the level of defense spending, spending as a share of national income, the industry's position on a global scale, export performance, and Türkiye's share of Alliance capability.

The first indicator is the level of spending. According to SIPRI data, Türkiye's military expenditure held at approximately \$10 billion (at constant 2023 prices) throughout the 2000s, before rising markedly after 2016. Expenditure increased from approximately \$10.4 billion in 2015 to \$21.9 billion in 2024, more than doubling over roughly a decade (SIPRI, 2025a).

Spending as a share of national income offers a different perspective on Türkiye's position within the Alliance. Türkiye's core defense expenditure as a share of gross domestic product stood at 2.08% in 2024 and is expected to rise to 2.33% in 2025 and 2.85% in 2026 (NATO, 2026b). Türkiye thus exceeds both the 2% threshold set under the 2014 Wales commitment

and the average for NATO Europe and Canada. This series is not directly comparable, however, to the 5% target set for 2035, as the new target encompasses broader security investments in addition to core defense spending; the two indicators should therefore not be compared directly. The change in Türkiye's defense spending relative to the United States and NATO Europe and Canada is shown in Figure 4.

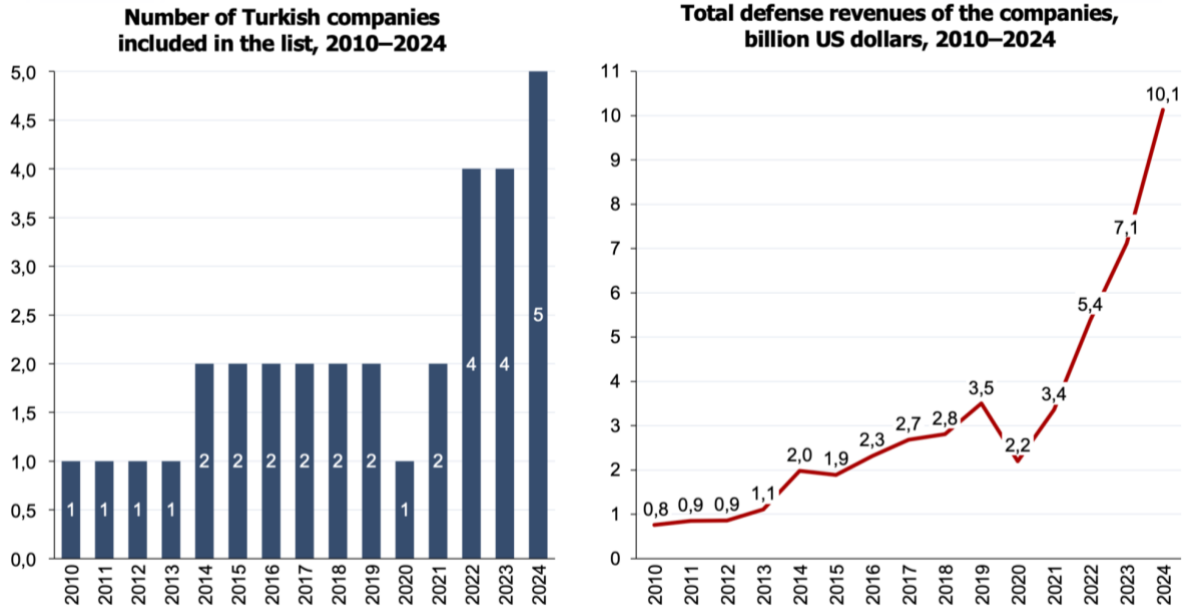
Figure 4. Defense spending as a share of GDP in Türkiye, the United States, and NATO Europe and Canada, %, 2014-2026



Source: NATO, TEPAV calculations.

Note: Data are valid as of 3 July 2026. The dashed line indicates the 2% minimum threshold for core defense expenditure set under the 2014 Wales commitment. The “NATO Europe + Canada” series is the aggregated series published by NATO.

This increase in spending has also been reflected in production capacity. The number of Turkish companies included in the Stockholm International Peace Research Institute's (SIPRI) ranking of the world's 100 largest defense companies rose from two in 2018 to five in 2024. These five companies, ASELSAN, Turkish Aerospace Industries (TAI), Baykar, Roketsan, and Makine ve Kimya Endüstrisi (MKE), generated combined defense revenue of approximately \$10.1 billion in 2024 (SIPRI, 2025b). The increase in the number of Turkish companies included in the SIPRI Top 100 and their combined defense revenue is presented in Figure 5.

Figure 5. Number of Turkish defense companies in the SIPRI Top 100 and their combined defense revenue

Source: SIPRI, TEPAV calculations.

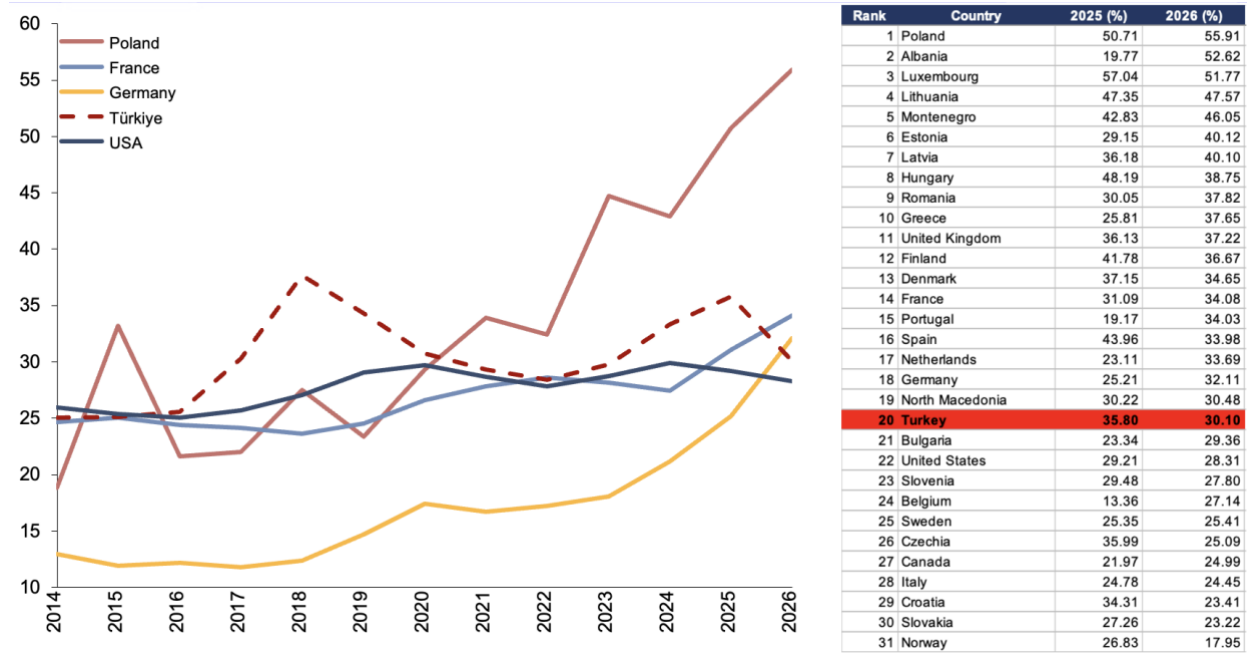
The deepening of production capacity has also been reflected in export markets. Türkiye's defense and aerospace exports rose steadily over the 2010–2024 period, reaching a historic high. According to data from the Türkiye İhracatçılar Meclisi (TİM; Turkish Exporters Assembly), defense and aerospace exports reached approximately \$10 billion in 2025, rising by roughly 49% year-on-year and making defense and aerospace the sector with the highest export growth rate that year (TİM, 2025). This performance demonstrates that the Turkish defense industry has developed the capacity to serve not only domestic demand but also international markets, a feature directly relevant to the discussion of defense-industrial cooperation and export restrictions later in this note.

The composition of these exports is also significant. A Reuters review of trade data, which examines defense industry products on a narrower scope, puts the figure at approximately \$10 billion for 2025. According to the same review, exports have more than tripled since 2021, while exports to Europe and the United States have risen nearly fourfold, reaching approximately \$5.6 billion. Türkiye today supplies defense products to roughly 40 countries (Reuters, 2026f). These data show that Türkiye's exports have shifted toward the West not only in volume but also in market composition, with Turkish companies' procurement agreements with Poland, Spain, Portugal, and Romania serving as concrete examples of this trend (Reuters, 2026f).

Finally, the composition of defense spending is also significant for Türkiye's position within the Alliance. NATO expects members to allocate at least 20% of their defense budgets to major equipment, and Türkiye has long exceeded this threshold. Its equipment share stood at 25.1% in 2014, notably above the Alliance average, before reaching its highest level of 37.6% in 2018. This picture, however, has shifted in recent years. Türkiye's equipment share is expected to stand at 30.1% in 2026, while the allied average rose to 34.3% over the same period, placing Türkiye 20th among the 31 allies for which data is available (NATO, 2026b). This shift stems not from a decline in Türkiye's modernization performance, but from other allies advancing

more rapidly in the same area. Türkiye began modernizing early, while the accelerated pace of equipment investment in Europe following the Russia–Ukraine war has narrowed Türkiye’s relative advantage. This picture illustrates that defense industrial capacity does not confer a permanent advantage within the Alliance and is instead sensitive to timing. Figure 6 compares Türkiye’s equipment expenditure share with those of selected NATO Allies and presents its projected ranking for 2026.

Figure 6. Equipment expenditure as a share of core defense budgets among NATO allies, %, 2014–2026



Source: NATO, TEPAV calculations.

Note: Data are valid as of 3 July 2026. The left-hand panel shows the trend for selected allies, while the right-hand panel shows the ranking based on the 2026 projection.

Taken together, these data substantiate the note's central argument. Türkiye’s demand for the removal of restrictions on its defense industry rests not merely on political expectation but on a measurable production capacity. The rise in exports to the European and U.S. markets further demonstrates that this demand is grounded in mutual interest. This capacity is well aligned with the joint production and supply-chain objectives set out in the Declaration. At the same time, however, as illustrated by the KAA engine case, the continued dependence on external supply for critical subsystems also limits this potential.

Taken together, the Ankara Summit Declaration’s treatment of collective defense, terrorism, the defense industry, Ukraine/the Black Sea, and regional security reveals a framework that largely aligns with Türkiye’s security priorities. The concrete counterpart of this alignment, however, will be found not in the Declaration’s general commitments, but in the progress achieved on the F-35, CAATSA, restrictions on the defense industry, and counterterrorism dossiers.

5. Policy Implications for Türkiye and Overall Assessment

The first dossier to be monitored following the summit is the F-35/CAATSA process. Other priority dossiers include KAA engine procurement, restrictions on the defense industry,

counterterrorism, and Black Sea security. The assessment below addresses, for each dossier, Türkiye's objective, the principal bottleneck, and the relevant measurable indicators.

Despite the positive political messaging on the F-35 and CAATSA, the process remains contingent on the U.S. Congress, existing sanctions legislation, and the S-400 issue. Gradual, conditional progress therefore appears more realistic than a swift, comprehensive normalization. Türkiye's core objective should be to track concrete steps toward lifting sanctions, resuming technical talks, and establishing a clearer timeline for the F-35 dossier.

The process surrounding the sale of F110 engines for KAAN also carries short-term importance. The congressional review, licensing conditions, and delivery schedules should be closely monitored given the project's serial production targets. This procurement should not, however, be viewed as a substitute for domestic engine development efforts. Reducing external dependence in critical subsystems remains a long-term priority for making Türkiye's defense-industrial capacity more resilient and predictable.

Türkiye's production capacity in unmanned systems, munitions, radar, electronic warfare, and air defense aligns with NATO's growing procurement and stockpile replenishment needs. Within this framework, Türkiye can position itself not merely as an ally increasing its defense spending, but as a producing ally contributing to closing the Alliance's capability gaps. Stronger participation by Turkish companies in NATO procurement mechanisms, joint production programs, and R&D projects is important for making this capacity more visible and durable at the Alliance level. This process should be addressed in tandem with a reduction in restrictions on Türkiye's defense industry.

In counterterrorism, what will prove decisive is whether the general language of the Declaration is translated into implementation. Türkiye's priority is to strengthen joint threat assessments, expand intelligence sharing, and develop a more consistent allied approach to field policies in Syria. Progress in this area will indicate whether the Declaration's emphasis on counterterrorism translates into a concrete security outcome.

Black Sea security also remains a core element of Türkiye's strategic role within NATO. Türkiye's capacity to implement the Montreux regime, its contribution to maritime security, and the diplomatic channels it maintains with both Russia and Ukraine enable it to simultaneously contribute to military deterrence and the containment of tensions. Sustaining this role in a manner consistent with NATO's eastern-flank plans is important.

The regional equation also shapes the trajectory of defense procurement dossiers. The impact of tensions in Türkiye–Israel relations on the U.S. Congress and on defense procurement decisions should be factored into the management of these dossiers as a separate political risk variable.

On the European Union track, Türkiye's demand for defense-industrial cooperation cannot be assessed independently of the stalemate in the accession process. Access to SAFE is subject to both legal and political constraints. The legal dimension arises from rules of origin and the requirement for a security and defense agreement, while the political dimension reflects the broader difficulties in Türkiye–EU relations. Access to SAFE, visa liberalization, and the modernization of the Customs Union are processes advancing through independent legal channels. For this reason, it appears more realistic to pursue these not as a single package, but in a politically coordinated manner.

Progress following the summit should be tracked through measurable indicators. These include certification steps under Section 1245, administrative decisions on the lifting of CAATSA measures, and progress in the search for a technical solution to the S-400 issue. Other indicators include the congressional review and delivery timeline for the F110 engines, the share of Turkish companies in NATO joint tenders, participation in the Drone Edge initiative, whether negotiations begin on a security and defense agreement under SAFE, and changes in restrictions on the defense industry.

The Ankara Summit has once again made visible Türkiye's strategic importance within the Alliance. The picture that has emerged from the summit, however, shows that strategic importance alone is not sufficient. As Öztürk (2026) notes, increased strategic value generates bargaining power but does not necessarily lead to institutional integration. Positive communication between leaders can accelerate certain dossiers, but lasting outcomes depend on navigating Congress and the relevant legislation in the United States, as well as institutional processes in Europe. For the summit to translate into a genuine gain for Türkiye, its diplomatic messaging must be backed by implementation timelines.

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