Strategic Trends in Defense, Aerospace, and Space (2025–2026): United States, European Union, and Türkiye

Executive Summary

The defense, aerospace, and space sectors are poised for significant evolution in 2025 and 2026, driven by rapid technological advances and shifting geopolitical priorities. This paper examines emerging strategic-level trends in these domains, focusing on the United States (US), the European Union (EU), and Türkiye. Key findings include:

- **Digital Transformation & Multi-Domain Operations:** All three regions are embracing digital technologies (artificial intelligence, advanced networks, data analytics) to enhance military effectiveness. The US is spearheading Joint All-Domain Command and Control (JADC2) to connect forces across land, sea, air, cyber, and space, while NATO allies and the EU explore their own multi-domain integration, learning from real-world conflicts like Ukraine[1][2]. Türkiye, too, is investing in network-centric systems and autonomous platforms, aligning with NATO's emphasis on emerging and disruptive technologies (EDTs) such as AI and robotics[3][4].

- **Space as a Warfighting Domain:** The militarization of space is accelerating. The US Space Force, established in 2019, is issuing new *Space Warfighting Frameworks* to guide use of military power in space – a realm once seen as benign[5]. The EU and its member states are developing a unified space security strategy aimed at deterring hostile activities in orbit, and fielding secure communication constellations. Türkiye has launched its first largely indigenous communications satellite and is expanding its space ambitions, including plans for a spaceport and deeper military use of satellites[6][7].

- **Defense-Industrial Collaboration and Innovation:** Collaborative development and production are viewed as strategic imperatives, though approaches vary. The US is leveraging alliances (e.g. AUKUS, joint programs) and public-private partnerships to maintain a technological edge, with record research and development (R&D) budgets targeting hypersonics, cyber, AI, and other game-changers[8]. The EU, spurred by war in Europe, has unveiled its first-ever defense-industrial strategy to boost joint investment and reduce fragmentation – currently only ~18% of European defense equipment procurement is collaborative[9]. New EU initiatives like the European Defence Fund and joint procurement schemes are addressing capability gaps (e.g. ammunition shortages) and encouraging members to "buy European" together[10][11]. Türkiye

continues to prioritize defense-industrial autonomy, ramping up indigenous production of drones, missiles, tanks, and now fighter jets, while seeking selective partnerships abroad to access critical technologies.

- **National Security Policy Shifts:** Each region's strategic posture is adapting to current threats. The US 2022 National Defense Strategy refocuses on great-power competition, naming China as the "pacing challenge" and Russia as an "acute threat," and pursues "integrated deterrence" across domains and with allies[12]. European nations, after decades of low defense spending, are undergoing a *Zeitgeist* shift toward territorial defense and strategic autonomy in response to Russia's aggression, as reflected in the EU's 2022 *Strategic Compass* and increased NATO commitments. Türkiye's security policy is at a crossroads: it balances NATO obligations with regional ambitions and relations with both West and East. Analysts note that Ankara faces critical decisions on whether to realign more closely with Western security frameworks or hedge independently; a pivot "Return to the West" would bolster its defense industry via cooperation, whereas turning toward Russia/China would yield limited benefits[13][14]. Turkish strategy documents (such as the national space roadmap and defense industry plans) emphasize self-reliance and export growth as pillars of national security.

In summary, **the US, EU, and Türkiye all recognize that technological innovation, spacepower, and alliances will define the next era of defense.** Their strategies for 2025–2026 converge on harnessing new technologies and strengthening defense ecosystems, yet diverge in emphasis: the US projects power globally with a tech-driven joint force; the EU strives for unity and resilience in defense capabilities; Türkiye seeks to become a regional power through indigenous innovation and pragmatic partnerships. The following sections provide a detailed regional analysis, a comparative overview (including policy priorities, investments, and institutional developments), and a conclusion forecasting how these trends may shape the global security landscape beyond 2026.

Introduction

In the mid-2020s, the global defense, aerospace, and space sectors are undergoing profound transformation amid fast-evolving security challenges. The convergence of advanced technologies with intensifying geopolitical rivalries has prompted nations and alliances to revisit their strategic plans. This research paper analyzes the emerging strategic-level trends expected in 2025 and 2026, with a focus on the United States, the European Union, and Türkiye. These three actors offer a complementary perspective: the US as a superpower redefining its military for great-power conflict; the EU as a coalition of states striving for greater defense cohesion; and Türkiye as a regional power pursuing military modernization and strategic autonomy.

The analysis addresses several core themes. First, it identifies emerging trends such as the digital transformation of defense organizations, the adoption of multi-domain operational concepts (exemplified by the US-led JADC2), the increasing militarization of space, and evolving patterns of defense-industrial collaboration. Second, it compares how the US, EU, and Türkiye are prioritizing policies, investments, and institutional reforms in light of these trends. Third, it reviews major strategic documents and policy initiatives introduced in the last two years (2023–2024) that set the stage for 2025–2026. Finally, it integrates insights from recent academic research (2023–2025) to provide a scholarly context for these strategic developments.

Overall, this paper aims to provide defense planners, policymakers, and scholars with a structured overview of where the transatlantic and regional security landscape is heading in the near term. By examining each region in turn and then synthesizing the findings, we seek to illuminate both common trajectories and divergent paths in defense, aerospace, and space strategy.

Methodology

This study employs a qualitative research approach, combining policy analysis with a review of recent literature. The methodology involved the following steps:

1. **Document Analysis:** We surveyed key strategic documents and white papers released over 2022–2024 in each region. For the US, this included the 2022 National Security Strategy (NSS) and National Defense Strategy (NDS), along with Department of Defense (DoD) posture statements and service-level strategy papers. For the EU, we examined the EU *Strategic Compass for Security and Defence* (2022), NATO's 2022 Strategic Concept (since most EU members are in NATO), and European Commission initiatives on defense industry and space security. For Türkiye, we reviewed official communications such as the Turkish Ministry of

Defense's 2023 Annual Report, the National Space Program (announced 2021, with updates through 2023), and strategy reports by Türkiye's Presidency of Defense Industries (SSB).

2. **Literature Review:** We integrated findings from academic and expert analyses published in 2023–2025. This included peer-reviewed journals and think-tank reports accessed via databases like ProQuest and EBSCO. Notably, NATO's own research on emerging military trends informed our understanding of multi-domain operations and EDTs[3], while think-tank studies (e.g., Atlantic Council, IISS, Carnegie Endowment) provided insight into European defense collaboration and Türkiye's defense industry orientation[15][16]. We preserved relevant citations throughout to anchor points in credible sources.

3. **Comparative Framework:** We developed a comparative framework to evaluate each region across common dimensions: **policy priorities** (threat perceptions and strategic goals), **capability investments** (budget levels, modernization programs), and **institutional frameworks** (organizations and partnerships guiding defense efforts). This framework guided the structure of the comparative analysis section and the creation of summary tables.

4. **Trend Identification:** Using the above sources, we identified cross-cutting trends (digital transformation, multi-domain integration, space militarization, industrial collaboration, and policy shifts) and noted how each manifests in the US, EU, and Türkiye. Emphasis was placed on strategic-level trends (doctrine, high-level investments, organizational changes) rather than tactical or purely operational developments.

The combination of primary strategy documents and recent scholarly commentary ensures that the analysis is both up-to-date and grounded in authoritative information. All source citations are provided in the text in the specified format to allow verification and further reading. The next sections present the findings for each region, followed by a comparative discussion that highlights similarities and differences.

Strategic Trends in the United States

The United States enters 2025 with a defense establishment heavily focused on retooling for high-end competition. After two decades of counterinsurgency and counterterrorism operations, US strategy has pivoted toward deterring and, if necessary, defeating peer adversaries. Several strategic trends define this shift:

1. Emphasis on Great-Power Competition and Integrated Deterrence: The 2022 US National Defense Strategy makes clear that China and Russia are the central challenges to US security[12]. China is

deemed the “pacing” threat – the benchmark for US military modernization – while Russia is an “acute” threat requiring immediate vigilance[17]. To address these, the Pentagon is pursuing “integrated deterrence,” which means using a mix of military capabilities across all domains, combined with allies and non-military tools, to discourage aggression[18]. This is complemented by a concept of “campaigning,” i.e. day-to-day efforts to shape the security environment, and “building enduring advantage” through innovation[19]. In practice, this has led to new initiatives to integrate conventional deterrence with nuclear deterrence, economic statecraft, and coalition-building.

2. Digital Transformation and JADC2: A cornerstone of the US future force is *Joint All-Domain Command and Control (JADC2)* – a vision for seamless connectivity among sensors and shooters in every domain (land, air, sea, cyber, space). The goal is to enable forces to share data instantly and coordinate effects faster than adversaries. However, moving from vision to reality is challenging. The US military must overhaul legacy “stovepiped” C2 systems built for the industrial age to achieve the desired “seamless, automated sharing of data”[1]. Significant investments are underway: the Department of Defense boosted spending on networking, AI, and cloud computing as part of a $145 billion R&D budget for FY2024, much of it supporting JADC2 and related cyber capabilities[8]. The US Army, Air Force, and Navy are each developing components (Project Convergence, Advanced Battle Management System, Project Overmatch, respectively) that will plug into JADC2. A notable aspect of digital transformation is the integration of **artificial intelligence (AI)** for decision support. AI and machine learning are expected to help commanders absorb the “data tsunami” and even autonomously identify threats and target them at machine speed. As Army Chief of Staff Gen. James McConville noted, leveraging AI is essential so that modernized C2 systems can “pass data at the speed of relevance” in warfare[20][21]. Additionally, the DoD created a Chief Digital and AI Office (CDAO) to unify efforts in AI, data, and digital innovation across the services, indicating how critical this domain has become.

3. Modernizing for Multi-Domain Operations (MDO): In parallel with JADC2, the US Armed Forces are updating doctrine and force structure for Multi-Domain Operations. This concept envisions coordinated operations that converge effects from land, air, maritime, cyber, and space forces. The Army, for example, is standing up Multi-Domain Task Forces that can employ long-range fires, cyber, and space assets together to penetrate enemy anti-access defenses[22]. Through JADC2’s AI-enabled networks, these forces will be able to act on information faster and strike more precisely, embodying the MDO approach[23]. The emphasis on multi-domain integration is also influencing training and exercises; large-scale exercises (e.g. *Defender Pacific* or *Northern Edge*) now routinely include cyber and space injects alongside traditional air-land maneuvers.

4. Space: Establishing a Warfighting Posture: The US has moved decisively to treat space as a warfighting domain. The creation of the US Space Force (USSF) and US Space Command

(USSPACECOM) in 2019–2020 was followed in 2023–2024 by the development of new strategies and doctrines for space security. In April 2025, the Space Force released a *Space Warfighting Framework* that provides a "warfighting lens" for planners and operators, essentially sharpening the plans for potential conflict extending into space[5][24]. This reflects a recognition that space assets (satellites for communication, navigation, ISR) are no longer safe havens – they are targets and tools in military competition. Senior defense officials have been increasingly frank about the "need for weapons in space" to protect US interests[5]. The USSF is accordingly pursuing systems like satellite jammers, rapid launch capabilities for replacement satellites, and possibly orbital defense systems (though details are classified). Additionally, resilience is a key theme: the Pentagon's Space Development Agency is deploying constellations of small satellites in low-earth orbit to ensure networks survive even if some satellites are attacked. Overall, by 2025 the US military will have further integrated space into operational plans, working closely with allies like France, Japan, and others who have their own space commands.

5. Defense-Industrial Base and Innovation Ecosystem: To underpin these strategic shifts, the US is investing in its defense-industrial base and innovation ecosystem. One trend is an effort to streamline the defense acquisition process to bring in non-traditional tech firms and speed up innovation. The Pentagon has launched initiatives such as AFWERX/SpaceWERX (Air/Space Force tech accelerators), the DIU (Defense Innovation Unit) in Silicon Valley, and pilot programs under new flexible contracting authorities. Despite the world's largest defense budget (~$800 billion annually), US defense planners worry about keeping an edge in critical technologies like **microelectronics, hypersonic missiles, quantum computing, and biotechnology**. NATO's Science & Technology Organization outlines many of these as priority tech areas (AI, autonomy, quantum, hypersonics, etc.)[3], and the US is often the principal driver in each. Notably, the US is working with allies on some cutting-edge projects – for example, the AUKUS security pact (with the UK and Australia) includes collaboration on hypersonic weapons and quantum technologies in addition to nuclear submarines. Furthermore, supply chain resilience has become a strategic concern, after pandemic disruptions and revelations of dependencies on foreign suppliers (like China for rare earth metals or microchips). Expect 2025–2026 to see continued US government investment in on-shore production of critical components and munitions (for instance, ramping up missile and artillery shell manufacturing, drawing lessons from the Ukraine war consumption rates).

6. Evolving Policy and Force Posture: In terms of force posture and policy, the US is shifting deployments to align with its strategy. More naval and air forces are being oriented toward the Indo-Pacific to deter China (e.g. Pacific-based Army units receiving long-range missiles, more frequent carrier deployments to the South China Sea). At the same time, the US has reinforced its commitment to Europe through NATO, sending additional rotational troops and equipment to Eastern Europe after Russia's invasion of Ukraine in 2022. Balancing these two theaters is a challenge, leading to discussions of increasing overall force structure or relying more on allies. The National Security Strategy also highlights *alliances and*

partnerships as “America’s unmatched asset”; we see efforts to strengthen alliances (e.g. NATO’s expansion with Finland and Sweden, deeper defense ties with Japan, India, etc.). The US’s national security policy has also expanded to include climate change and pandemics as security issues, but in the defense arena, those translate into new missions (like humanitarian assistance, securing supply chains) rather than core warfighting changes.

In summary, the United States in 2025–2026 will be characterized by a military in transition – adopting new technologies, integrating operations across domains, and hardening its space and cyber defenses – all while managing the persistent risk of conflict with major adversaries. The strategic documents of the past two years have set this course, and execution is now underway. The next section examines how a very different actor, the European Union, is responding to its own security imperatives in this dynamic environment.

Strategic Trends in the European Union

For Europe, the years 2025 and 2026 are set to be transformative in defense and aerospace integration. The catalyst has been the stark return of high-intensity war to the continent with Russia’s 2022 invasion of Ukraine, shattering long-held assumptions about European security. The EU and its member states (most of which are NATO allies) have embarked on major course corrections in defense policy. Key strategic-level trends in the European Union include:

1. A New Era of Collective Defense and Deterrence: European strategic thinking has shifted emphatically toward territorial defense and deterrence of Russian aggression. The NATO 2022 Strategic Concept and the EU’s *Strategic Compass* (approved in March 2022) both reflect this priority, identifying Russia as the most immediate threat. European NATO members are bolstering their deterrence posture on the alliance’s eastern flank by deploying more troops, conducting continuous exercises, and investing in capabilities like air and missile defense. For example, Germany’s concept of a *Zeitenwende* (“historic turning point”) led to a commitment of €100 billion in extra defense funding and the purchase of systems ranging from F-35 fighter jets to Arrow-3 missile defense. Finland and Sweden’s decisions to join NATO (Finland joined in 2023, Sweden’s membership is pending) also underscore the new emphasis on collective defense. The EU *Strategic Compass* calls for the ability to deploy rapid expeditionary forces (up to 5,000 troops) and to improve military mobility across Europe’s borders, indicating an ambition for the EU to act more cohesively in security crises by 2025.

2. Increasing Defense Spending and Investment in Capabilities: After years of underspending, virtually all EU member states are increasing their defense budgets, with many setting targets to reach or exceed 2% of GDP on defense (the NATO guideline) by mid-decade. Europe's total defense spending reached a record €270 billion in 2023[15], and this growth trajectory is likely to continue through 2026. Those funds are being directed toward closing critical capability gaps exposed by the Ukraine war. Two areas stand out: **munitions and logistics**, and **intelligence, surveillance, and reconnaissance (ISR)**. The munitions shortfall – Europe found its stockpiles of artillery shells and missiles running low due to aid sent to Ukraine – led to joint procurement initiatives. Under the *European Defence Agency's* coordination, EU members agreed in 2023 to aggregate demand for 155mm artillery ammunition and other key ordnance to incentivize industry to boost production. Additionally, the EU launched the *Act in Support of Ammunition Production (ASAP),* a €500 million fund to ramp up European manufacturing of ammo and missiles[10]. In the ISR domain, EU nations are investing in reconnaissance drones, satellites, and secure communications. The EU is also moving forward with a secure government satellite communications constellation (IRIS²), due by 2027, to ensure independent European satcom coverage – an initiative blending civil and military needs in space.

3. Defense-Industrial Collaboration and EU Initiatives: Acknowledging that fragmentation has long hampered Europe's defense industry, EU leaders have introduced new frameworks to foster cooperation. In 2023, the European Commission unveiled its **first-ever Defense Industrial Strategy**[26]. This strategy recognizes that while spending is up, it must be channeled efficiently – yet currently only ~18% of European states' equipment investments are collaborative[9]. The strategy and related EU programs aim to reverse that. For instance, the *European Defence Fund (EDF)*, operational since 2021, co-finances multi-national R&D projects in cutting-edge areas (from AI to advanced materials). The *EDIRPA* legislation (European Defence Industry Reinforcement through common Procurement Act) provides €300 million to support joint procurement in 2023–24, seen as a pilot for larger projects[10]. These EU efforts, while modest in budget compared to national spending, signal a political willingness to integrate defense planning. Major collaborative projects among subsets of EU nations are also progressing: the Franco-German-Spanish **Future Combat Air System (FCAS)** and the British-Italian-Japanese **Global Combat Air Programme (GCAP)** (which succeeds the Tempest project) are two next-generation fighter programs aiming for the 2035–2040 timeframe. Likewise, the French-German **Main Ground Combat System (MGCS)** tank project and the European MALE drone (Eurodrone) project illustrate attempts to pool resources. By 2025, we expect clearer outcomes on these programs – either convergence and development or potential fractures – which will influence whether Europe's defense-industrial base becomes more integrated or not.

4. Multi-Domain and Digital Integration in Europe: European militaries are also adopting the multi-domain operational concepts championed by the US, albeit tailored to their context. NATO has fully embraced Multi-Domain Operations (MDO) as a guiding concept for force development[2], and European members are actively participating in this. They are focusing on interoperability – ensuring that national forces can plug into combined networks and data-sharing in real time. A concrete example is US European Command's series of exercises (e.g., Defender Europe, Baltic Operations) that practice joint all-domain scenarios, including space and cyber aspects, with European allies. European defense planners see digital transformation as crucial; however, Europe's advantage may be fewer legacy systems to overhaul. Some analysts argue that NATO Europe, having less sunk investment in old C2 architecture, "might have a leg up" in adopting agile, off-the-shelf networks (as seen in Ukraine's use of Starlink and drone tech) compared to the slower US systems[27][28]. The war in Ukraine has indeed functioned as a testing ground for digital-age warfare in Europe: cloud-connected drones, open-source intelligence, and rapid software updates to battlefield systems have all featured prominently. Lessons from Ukraine are feeding into NATO and EU discussions on command and control modernization. The NATO *Digital Transformation* agenda, launched as part of its 2022 Madrid Summit decisions, also influences EU members – for example, commitments to improve secure communications, federated cloud for operations, and AI applications in defense. By 2025, European allies aim to better integrate with the US JADC2 concept; the US Army has been working to ensure European allies can tie into its future JADC2 networks[20][29]. The use of AI to support targeting and logistics is being explored by several leading nations (the UK Ministry of Defence and France's armed forces have dedicated innovation hubs focusing on this).

5. Space and Security: The European Union is increasingly active in the space security domain, treating space as essential to both economic and defense interests. The EU and European Space Agency (ESA) have traditionally focused on civilian programs (like Galileo navigation satellites and Copernicus Earth observation). Now, with rising threats, there's momentum toward a more robust security role. The EU in 2023 formulated a "Space Strategy for Security and Defence," which centers on **protecting European space assets and deterring hostile acts in space**[30]. This strategy includes developing capabilities for Space Situational Awareness (to monitor satellites and debris), enhancing the resilience of critical satellites, and even exploring technologies to counter anti-satellite (ASAT) weapons (likely via non-kinetic means like electronic warfare, since Europe has renounced destructive ASAT tests). Individual EU members have created military space units – France's Space Command (CDE), Germany's Space Operations Center, Italy's space operations within its Air Force, etc., all since 2019. These national efforts are increasingly coordinated: France and Germany, for example, signed agreements on sharing space

surveillance data. The **militarization of space in Europe** is thus advancing but remains primarily defensive and surveillance-oriented. By 2025–2026, the EU's flagship IRIS² communications constellation will be in development, promising secure links for governments and militaries across Europe, and ESA's space cybersecurity initiatives will likely yield frameworks for joint response to space threats. Furthermore, Europe is considering a collective approach to **launch capabilities** to ensure access to space (recent discussions even include the potential for an EU spaceport, though for now launches remain national, e.g., France's Kourou or planned UK spaceports).

6. Policy and Institutional Shifts: Institutionally, the EU's role in defense is stronger than ever, though it complements NATO rather than replaces it. The European Defence Agency (EDA) is coordinating more projects; the European Commission, unprecedentedly, is directing funds into defense (despite EU treaties traditionally barring military funding, loopholes now allow "industrial" support). The European Peace Facility, established in 2021, has been used to finance military aid (e.g., reimburse member states for arms sent to Ukraine), marking the first time the EU collectively finances lethal weapon transfers. These changes indicate the EU is willing to act as a security actor when needed. Simultaneously, NATO remains the cornerstone for collective defense – the alliance is adapting through its 2022 Strategic Concept which, like the EU's Compass, highlights emerging challenges (from cyber attacks to disruptive technologies and climate). NATO's new multinational battlegroups in Eastern Europe and its innovation support (via the Defence Innovation Accelerator for the North Atlantic, DIANA, and a multibillion NATO Innovation Fund) benefit many EU members. We see a developing **EU-NATO synergy**: NATO handles operational defense and deterrence, while the EU mobilizes economic and regulatory power to reinforce the defense base (for example, simplifying cross-border troop movement through EU legislation, or investing in critical technologies).

In summary, the EU by 2025–2026 is expected to be more unified, spend more on defense, and engage in unprecedented collaboration on military matters. While challenges remain – differing national interests and the sheer scale of coordination required – the trend is a Europe that takes its security seriously, integrating new technologies and even venturing into space and cyber defense. The next section turns to Türkiye, a NATO member and EU partner that charts its own course with a mix of Western ties and independent strategic goals.

Strategic Trends in Türkiye

Launch of Türkiye's first largely indigenous communications satellite, Türksat 6A, on a SpaceX Falcon 9

rocket (July 2024). This milestone reflects Türkiye's "national technology move" toward greater self-reliance in space and communications infrastructure[6][31].

Türkiye sits at the nexus of Europe, the Middle East, and Central Asia, and its defense and aerospace ambitions have grown markedly in recent years. As we approach 2025, Türkiye is leveraging its expanding defense industry and geostrategic position to emerge as a regional power with global reach in select domains. The strategic trends for Türkiye include:

1. Pursuit of Strategic Autonomy and Indigenous Capabilities: A defining feature of Türkiye's strategy is its drive for strategic autonomy – reducing dependence on foreign suppliers by building a robust domestic defense industry. Over the past decade, Türkiye has invested heavily in indigenous design and production of advanced military systems. This includes unmanned systems (the famed Bayraktar TB2 armed drone and its successors like Akıncı UCAV), missiles (the SOM cruise missile, HISAR air defenses), armored vehicles (Altay main battle tank, various APCs), and now fifth-generation fighter jets (the TF-X, recently named "KAAN", which achieved a rollout and taxi tests in 2023). By 2025–2026, Türkiye aims to field or at least prototype many of these systems. The *"National Technology Initiative"* often referenced by Turkish leadership encapsulates this push for self-reliance and innovation. Turksat 6A, launched in 2024, is a prime example in the aerospace realm: 81% of its components were developed domestically, and it carries military-grade X-band communications for the Turkish Armed Forces[32][33]. This focus on local industry serves strategic autonomy by ensuring that Türkiye can sustain military operations even if access to foreign equipment is curtailed (as it was after the US halted F-35 deliveries and arms embargoes were considered by some nations). It's also an economic strategy, as defense exports become a source of revenue and influence. In fact, Türkiye's defense and aerospace exports have been climbing (reaching a record high in 2022 and expected to grow further by 2025), with Baykar's drones sold to numerous countries and new markets opening for Turkish-made naval vessels, trainer aircraft, and more.

2. Modernization and Multi-Domain Ambitions: The Turkish Armed Forces are undergoing broad modernization across land, sea, air, and now space domains. The Defence Ministry's 2023 annual report enumerated 49 ongoing modernization projects[34], illustrating the breadth of this effort. Highlights include: upgrading main battle tanks (modernizing older American-made M60s and German Leopards with advanced fire control, armor, and active protection)[35][36]; introducing new indigenous platforms like the Altay tank (with foreign engine assistance) and the Tulpar IFV; enhancing naval power with the MILGEM program (indigenous corvettes and frigates) and the upcoming *MİLDEN* project – Türkiye's first indigenous submarine expected to start construction in 2025[37]. Türkiye's navy has also commissioned a

mini aircraft carrier/amphibious assault ship, the TCG *Anadolu*, which is being adapted to carry armed drones (turning it effectively into the world's first "drone carrier"). The Air Force, while coping with the loss of the F-35, is extending the life of its F-16 fleet with upgrades and possibly acquiring new F-16 Block 70s[38], as well as accelerating domestic fighter development (TF-X) and introducing new trainer/light attack jets (Hürjet) by 2025[39]. In the unmanned and autonomous sphere, Türkiye is integrating drones into all services, including land (uncrewed ground vehicles like Aselsan's BARKAN UGV) and expanding the range of UAVs via satellite links[40]. These efforts align with global multi-domain trends; Türkiye is essentially ensuring it can operate and link assets across domains. For example, extending drone control via satellite touches space and cyber domains; developing interoperable C4 systems for tanks and aircraft indicates network-centric warfare adoption.

3. Space and Satellite Capabilities: Türkiye's leadership has explicitly recognized space as a frontier for strategic competition. In 2018, Türkiye established the Turkish Space Agency, and in 2021 it announced an ambitious National Space Program that included goals such as reaching the Moon (with an indigenous rocket) and sending Turkish astronauts to space. By 2023, some milestones have been reached: a Turkish Air Force pilot was sent to the International Space Station in late 2023 (through a partnership with Axiom Space and SpaceX)[41], marking Türkiye's first human spaceflight experience. Türksat 6A's launch in 2024 was another milestone, making Türkiye one of only a few nations to deploy a communications satellite to geostationary orbit largely with its own technology[6]. Türkiye operates a growing constellation of satellites, including Göktürk-1 and -2 (Earth observation for military reconnaissance) and is developing new reconnaissance satellites (İMECE was launched in 2023 as Türkiye's new high-resolution imaging satellite). The strategic importance of these assets is high: they support military intelligence needs and reduce reliance on foreign imagery. Moreover, Türkiye's consideration of building a *spaceport in Somalia* (near the equator, ideal for launches) indicates a bold attempt to gain independent launch capability and influence abroad[42]. If realized, such a project could by late 2020s give Türkiye a direct stake in the global launch industry and a means to deploy military satellites at will. While Türkiye does not yet have military space forces akin to the US or France, its air force and aerospace industry are integrating space into their operations, focusing on satellite communications, navigation, and imagery for the military. Protecting these assets is likely on Türkiye's radar; in 2022, Türkiye held its first "Space Security and Defense" workshop to discuss secure satellite communications and space situational awareness[43]. Thus by 2025, Türkiye will be regarded as an emerging spacefaring defense actor, with dual-use satellites and aspirations to be among the leading space nations by the 2030s.

4. Defense-Industrial Partnerships and Alignments: Türkiye's unique geopolitical position means it straddles Western and non-Western defense relationships. Over the last two years, Ankara has shown a pattern of *hedging* – trying not to be overly dependent on any single bloc. After being excluded from the F-35 program due to its purchase of Russian S-400 air defense systems, Türkiye accelerated cooperation with other partners. For instance, it deepened defense ties with **Ukraine**, jointly producing turbine engines (Ukrainian engines power Türkiye's Akıncı drone and possibly the future TF-X in early batches) and planning joint ventures on fighter engine technology. Cooperation with **Pakistan** is also notable, including deals to supply Pakistan with Milgem corvettes and perhaps collaborate on submarine development. Meanwhile, Türkiye maintains dialogue with Russia (talk of potential fighter or SAM co-development, although no major deals beyond S-400 have materialized). That said, there are recent indications of Türkiye tilting back toward Western alignment: it has made moves to repair relations with the US (e.g., talks of acquiring Patriot or Eurosam air defense systems to complement – or replace – the S-400, and hopes to eventually rejoin advanced jet programs). Turkish policymakers recognize that completely isolating themselves from Western defense ecosystems would be "damaging" and reduce capacity[44][45]. A 2024 analysis by IISS outlined strategic options for Türkiye, suggesting that a *"Return to the West"* approach — improving ties with NATO allies and the EU — is the less risky path for sustaining Türkiye's defense industry and innovation[13][14]. This approach seems plausible given developments like Türkiye's approval of Finland/Sweden's NATO bids (indicating a desire to mend NATO relations) and joint projects with Italy and the UK (e.g., Turkish Aerospace industries had British engineering support on the TF-X design). Additionally, Türkiye is seeking to join the EU's defense projects; in 2023 Türkiye applied to rejoin the EU's Permanent Structured Cooperation (PESCO) military projects on an individual basis. While some collaboration was hindered by politics, there are signs of openness, particularly in less sensitive areas like military mobility. We expect Türkiye in 2025–26 to continue this balanced approach: maintaining its own defense production independence but also engaging in selective partnerships that enhance its capabilities (for example, being part of multinational exercises and maybe contributing to NATO's Future Surveillance or Next-Gen Rotorcraft projects if political conditions allow).

5. National Security Policy and Regional Posture: Türkiye's national security policy has been notably assertive in the past few years, with military interventions in Syria, Iraq (against PKK insurgents), Libya, and support to Azerbaijan in Nagorno-Karabakh. This **forward defense and power projection** posture is likely to persist. For 2025–26, Türkiye will prioritize threats on its borders (instability in Syria, counterterrorism) and protect its interests in the Eastern Mediterranean. The concept of "Mavi Vatan" or "Blue Homeland," which emphasizes Türkiye's maritime claims and rights (especially regarding energy exploration in the Mediterranean and Aegean), drives naval expansion and could lead to strategic friction

with Greece or others if not managed. Türkiye's acquisition of new submarines (co-produced with Germany) and development of anti-ship and anti-air missiles underscore this maritime focus. On the policy front, after the 2023 elections Türkiye's government signaled some intention to improve foreign relations – outreach to Israel, the Gulf states, and even attempts at rapprochement with Egypt and Armenia have been seen. A stable foreign policy would allow Türkiye to concentrate on defense modernization without active conflicts distracting resources. Another element is Türkiye's emphasis on **disruptive technologies for asymmetric advantage**. Recognizing it cannot simply match larger powers tank-for-tank or jet-for-jet, Türkiye invested in drones and electronic warfare early, yielding outsized influence (as seen in conflicts where Turkish drones were game-changers). Going forward, Türkiye is exploring areas like artificial intelligence, autonomous swarming drones, directed-energy weapons, and even hypersonic tech to keep that asymmetric edge[4]. The Turkish company Roketsan, for instance, has test-fired a satellite launch rocket that doubles as a ballistic missile test-bed. Such initiatives indicate how Türkiye's defense strategy interweaves conventional buildup with cutting-edge systems to deter adversaries.

6. Institutional and Policy Framework Developments: Institutionally, Türkiye's defense procurement is centrally managed by the Presidency of Defense Industries (SSB), which reports directly to the President. In the last two years, SSB released strategic plans aiming to further increase the domestic content of defense platforms and to prioritize R&D in key domains (like AI, space, cyber). Türkiye's Armed Forces have integrated some new structures too: for instance, a Cyber Defense Command exists under the military, and there's discussion of a joint force command for unmanned systems. The National Security Council of Türkiye periodically updates the national security strategy (though not always public), and it's believed that the latest iterations emphasize a multi-pronged approach: strengthening indigenous defense, active regional engagement, and balancing great power relations. Türkiye's education and human capital initiatives also feed this trend – there's a push to train more engineers and technicians in aerospace (e.g., through institutes and partnerships with universities, and events like TEKNOFEST which promote tech among youth). All these efforts tie into an image Türkiye crafts for itself: a rising techno-power that by 2025–2026 will not only secure its own sovereignty against any threat but also serve as a reliable security provider and arms supplier to friendly nations.

In essence, Türkiye's strategic trajectory for 2025 and 2026 is one of **assertive self-reliance coupled with calibrated cooperation**. It is simultaneously equipping itself to operate independently across all domains – land, sea, air, cyber, and space – and ensuring it is not isolated on the world stage. How Türkiye manages this balance will influence the security dynamics of its surrounding regions and its role within NATO.

Having outlined the individual regional trends, we now turn to a comparative analysis that juxtaposes the strategies of the US, EU, and Türkiye, highlighting both convergences and divergences in their approaches to defense, aerospace, and space in the coming years.

Comparative Strategic Analysis: US, EU, and Türkiye

In comparing the United States, European Union, and Türkiye, it becomes evident that while they operate at different scales and face distinct security environments, there are overlapping themes in their strategic outlook. Below, we provide a comparative assessment across key dimensions – policy priorities, investments and capabilities, and institutional frameworks – supported by summary tables for clarity.

Policy Priorities and Strategic Documents

Each actor's policy priorities are shaped by threat perceptions and strategic ambitions, as codified in recent strategy documents:

- **United States:** The top priority is deterring *great-power adversaries*, primarily China and Russia, as articulated in the 2022 National Security Strategy and National Defense Strategy. The NSS emphasizes defending the "rules-based international order" and working with allies, while the NDS focuses on integrated deterrence and rapid innovation[12]. The US also highlights challenges like rogue states (Iran, North Korea) and transnational threats (cyber, terrorism), but these are secondary. Space and cyber are explicitly recognized as critical domains. Major policy initiatives in the last two years include the Pacific Deterrence Initiative (to bolster Indo-Pacific posture) and renewed commitments to NATO deterrence in Europe. Overall, US strategy documents convey a global outlook with multi-domain military supremacy as the goal.
- **European Union:** The EU's security and defense posture, collectively outlined in the 2022 Strategic Compass, centers on *defending Europe from aggression* (implicitly Russia) and managing crises in its neighborhood. The Compass sets targets for EU readiness by 2025 (like the 5,000-strong rapid deployment force) and stresses resilience against hybrid threats (e.g., cyber attacks, disinformation). The EU also released in 2023 a Joint Communication on *EU Space Security* and a policy on critical infrastructure protection after the Nord Stream sabotage, reflecting broadened threat horizons. Unlike the US, the EU's documents focus on **building capacity and unity** – for instance, improving military mobility and stockpiles – rather than projecting power globally. NATO's 2022 Strategic Concept complements this by reaffirming

collective defense. In sum, EU priorities are regional defense, unity among member states, and strengthening the technological and industrial base to support those aims[26][15].

- **Türkiye:** Türkiye's implicit strategic doctrine (official strategy documents are not always public) can be gleaned from statements and plans such as the "National Technology Initiative" and the 2019 Blue Homeland doctrine. Key priorities include *countering regional security threats* (PKK terrorism, instability on its borders), asserting its interests in surrounding regions (from the Eastern Med to the South Caucasus), and achieving *strategic autonomy*. Turkish policy emphasizes a proactive defense – striking threats at source (as seen in operations in Syria/Iraq) – and a strong deterrent posture through indigenous military strength. Recent policy documents like the 2019–2023 Strategic Plan of the Ministry of Defense, and the 2023 Annual Defense Report, underscore modernization and local production. Another priority is making Türkiye a spacefaring nation, per the National Space Program 10-year goals. Unlike the US/EU, Türkiye's policy has to balance internally between its NATO Western alignment and its independent streak; thus "hedging" is an underlying theme[46][13]. Türkiye's strategic communications frequently mention defending national sovereignty and promoting a "peace at home, peace in the world" principle, but in practical terms, Türkiye is ready to act unilaterally when it perceives threats or opportunities.

The table below summarizes major recent strategic documents and stated priorities for each actor:

Region	Recent Strategic Documents (2022–2024)	Core Security Priorities (2025–26)
United States	- National Security Strategy 2022- National Defense Strategy 2022 (with Nuclear Posture Review, Missile Defense Review)- DoD Cyber Strategy 2023 (unclassified summary)- Joint service strategies (e.g. Army Multi-Domain Transformation, Air Force Operational Imperatives)	- Deter Chinese aggression in Indo-Pacific (Taiwan focus) and Russian aggression in Europe[12]- Strengthen alliances (NATO, Indo-Pacific Quad, etc.) and partner capabilities- Maintain technological superiority (AI, cyber, space, nuclear modernization)- Protect the homeland (incl. against cyber attacks and missiles) and global commons (sea lanes, space)

Region	Recent Strategic Documents (2022–2024)	Core Security Priorities (2025–26)
European Union	- EU Strategic Compass for Security and Defence (2022)- NATO Strategic Concept (2022) – applicable to EU NATO members- EU Defense Industrial Strategy (2023)[26]- EU Space Security Strategy (2023)[30]- National White Papers (e.g. France's Strategic Update 2022, Germany's Zeitenwende documents)	- Deter and defend against Russian aggression; support Ukraine's defense- Achieve greater European strategic autonomy (complementing NATO) in defense capabilities- Address hybrid threats and cybersecurity; protect critical infrastructure- Secure Europe's space assets and develop independent EU space and ISR capabilities- Enhance power projection for crisis management (e.g. EU rapid deployment force by 2025)
Türkiye	- Turkish MoD Annual Report 2023[47][48]- National Space Program (announced 2021, updates ongoing)- Strategic Plan of Presidency of Defense Industries (SSB) 2019–2023 and beyond- Mavi Vatan (Blue Homeland) Doctrine for maritime strategy	- Counter internal and border terrorism; stability operations in Syria/Iraq- Maintain deterrence against regional adversaries (e.g. Greece in Aegean disputes, Syrian regime/others as needed)- Expand influence in near-abroad (Eastern Mediterranean, Caucasus, Middle East) through military cooperation and presence- Achieve self-reliance in defense tech (reduce imports) and boost defense exports- Develop indigenous space and missile capabilities for strategic depth

[9] *Source: European Commission and EDA data showing only 18% of European defense equipment procurement was collaborative in 2021–2022, highlighting the impetus for new EU defense-industrial policies to encourage joint projects.*

This table highlights that **the US focuses globally (with a tech and alliance edge), the EU focuses on regional defense and unity, and Türkiye focuses on regional autonomy and power projection**. However, all three place strong emphasis on improving technological capabilities and addressing new domains like cyber and space.

Investments, Capabilities, and Programs

In terms of hard power investments and capability development, we compare defense spending levels, major modernization programs, and emerging technology adoption:

- **Defense Spending Levels:** The US dwarfs the others in absolute spending – its annual defense budget (base plus overseas operations) is on the order of $800 billion, whereas the combined defense spending of EU member states is around $300 billion (with momentum to grow)[15], and Türkiye's defense budget is roughly $15–20 billion (subject to lira exchange fluctuations). As a percentage of GDP, the US and Türkiye are similar (around 3–4% and ~2% respectively, with Türkiye's exact figure varying by accounting method), and many EU countries are moving from ~1% toward 2% or more. Importantly, the trend in all three is upward spending due to heightened threat environments.

- **Modernization and Procurement Programs:** The US is in the midst of several big-ticket modernization programs: the Columbia-class SSBN (nuclear submarine) to replace aging boomers, the B-21 Raider stealth bomber (first flight expected ~2024), the Next Generation Air Dominance (NGAD) fighter in development, Army's next-gen combat vehicles and long-range hypersonic weapons (LRHW), and a wide portfolio of missiles (from hypersonic boost-glide weapons to new nuclear warheads like W93). Europe's programs are more cooperative: as mentioned, FCAS and GCAP for air combat, new European MALE drone, and numerous national procurements (F-35s for half a dozen European air forces, new tanks for Poland, etc.). The EU is also investing in transport and logistics (e.g., Airbus A400M airlifters, MRTT tankers via a pooled unit). Türkiye's major programs include the *TF-X KAAN* fighter (aiming for first flight by 2025), *Altay* tank (with a South Korean engine, entering production), *MILGEM* warships and *TF-2000* air defense destroyer project, a range of drones (Bayraktar TB3, Akıncı, Anka series, and forthcoming jet-powered drones like Bayraktar Kızılelma), and ballistic missile development (the Tayfun SRBM tested in 2022 is an example of extending strike range). In space, by 2025 the US will have the backbone of its new satellite architecture (Space Force's proliferated LEO satellites for communications/missile warning), the EU will be contracting its IRIS² satcom system and

possibly new Galileo services, and Türkiye will be planning its next observation satellites and human spaceflight steps.

- **Emerging Technologies and R&D:** All three place a premium on emerging tech. The US DoD has dedicated R&D funding streams for AI, microelectronics, directed energy, and biotech – exemplified by the establishment of the JAIC (now under CDAO) for AI, and major DARPA projects. The EU, through the EDF, is funding collaborative R&D in areas like drone swarms, military AI, quantum crypto, and energy supply for deployed forces. NATO's DIANA will also have test centers in Europe to trial dual-use innovations. Türkiye, while smaller in research budget, has carved niches in drones and smart munitions and is putting resources into AI and autonomy for military applications (ASELSAN and TUBITAK, a state scientific research institute, lead many such projects). One academic study notes NATO's focus on nine EDT areas[3]; Türkiye's efforts mirror many of these, focusing in particular on AI, autonomy, and directed energy as noted in a 2024 analysis[4].

The following table compares selected investments and flagship programs:

Aspect	United States	European Union (Key Nations/Collective)	Türkiye
Annual Defense Spending (approx.)	~$816 billion (FY2023) – highest worldwide[15]. R&D budget ~$145B (record high)[8].	~€270 billion (2023) for EU members (combined)[15]; rising toward >€300B by 2025. Collaborative spending gradually increasing.	~$20 billion (2023 est.) – increased defense budget despite economic strains; also substantial investment via SSB funds.
Major Procurement Programs	- F-35 Lightning II stealth fighter (continuous buys)- Columbia-class nuclear submarines (first unit ~2027)- B-21 Raider stealth bomber (in testing)- NGAD sixth-gen fighter (R&D)- Hypersonic weapons (Air-Launched Rapid Response Weapon,	- Future Combat Air System (FCAS) by France/Germany/Spain (6th-gen fighter, drone "loyal wingmen")- Global Combat Air Programme (UK/Italy + Japan) sixth-gen fighter- Eurodrone (Medium Altitude Long Endurance UAV for multiple EU countries)- Main	- TF-X "KAAN" fifth-gen fighter (prototype build underway)- Bayraktar TB3 and Kızılelma UCAV (unmanned combat aircraft for TCG Anadolu)- Altay main battle tank (domestic production starting 2023–24)- HISAR/O+ air

Aspect	United States	European Union (Key Nations/Collective)	Türkiye
	LRHW)- Missile defense upgrades (e.g. Next-Gen Interceptor)- Army's Future Vertical Lift (new helicopters/drones)	Ground Combat System (future tank France/Germany, in concept)- EuroSAM TEAMS (ground-based air defense co-op, e.g. SAMP/T air defense improvements)- F-35 acquisitions (e.g. by UK, Italy, Netherlands, Poland, Finland, etc.)- Naval: French Barracuda subs, Italian FREMM frigates, UK Dreadnought subs (national but contribute to EU capability pool)	defense missiles (fielded), SİPER long-range SAM (in development)- MILGEM warships (I-class frigates, etc.) and TF-2000 destroyer project- New-generation satellites (IMECE EO satellite launched 2023, future Göktürk)
Emerging Tech Focus	- Artificial Intelligence (Project Maven, Joint AI Center/CDAO) for decision-making and autonomy[20].- Cyber offense/defense (Cyber Command elevated, persistent engagement strategy).- Space: Satellites (e.g. SDA's Transport & Tracking layers), X-37B spaceplane testing.- Directed Energy: laser weapons for base/ship defense (prototype deployments of 300 kW lasers).- Biotech: DARPA programs on warfighter	- European Defence Fund projects on: drone swarming, military AI for situational awareness, cyber defenses, quantum communication (EuroQCI initiative), and autonomous ground vehicles.- NATO DIANA is establishing innovation testbeds in Europe for dual-use tech startups.- National efforts: France's AI defense strategy, Germany's cyber innovation hub, etc.- Space: EU Galileo GNSS modernisation (anti-jam), EU SST (Space	- AI and autonomous systems emphasized for drones and robotics (e.g. AI-driven target recognition in Baykar drones).- Robotics: UGV programs (Barkan, UKAP) for armed ground robots.- Directed energy: ASELSAN developing laser defense systems (for drones).- Hypersonic: experiment with high-speed missiles (Ramjet tech under TÜBİTAK SAGE).- Space tech: indigenous rocket development (e.g.

Aspect	United States	European Union (Key Nations/Collective)	Türkiye
	health, gene-editing detection.- Quantum: quantum clocks, quantum-resistant encryption R&D.	Surveillance and Tracking) to monitor objects and threats in space.	Delta V's tests), aiming for partial launch capability by late 2020s.- Electronic warfare: strong focus (KORAL EW system) to counter advanced radars and missiles.

Sources: U.S. DoD Budget Documents, European Defence Agency reports, Türkiye SSB statements, and various defense news sources[8][10][40].

This comparison shows that while the **US retains the largest, most technologically ambitious portfolio, Europe is leveraging collective efforts to modernize, and Türkiye is selectively investing to punch above its weight**. Notably, all are pouring resources into drones/UAVs, next-gen aircraft, and missile systems, reflecting the future character of warfare.

Institutional Frameworks and Collaborations

The way each actor organizes its defense institutions and international collaborations reveals how they intend to realize their strategies:

- **United States:** Institutionally, the US Department of Defense stands at the apex with unified command structures for new domains (e.g. US Space Command, Cyber Command). The US has also established cross-cutting offices for innovation (Undersecretary of Defense for Research & Engineering oversees tech development, and initiatives like the Defense Innovation Board bring in private sector advice). Inter-agency strategies, such as a whole-of-government approach to cybersecurity (led by the Cybersecurity and Infrastructure Security Agency, CISA, which released an International Strategy 2025–2026 to deepen global cyber partnerships[49]), complement DoD efforts, indicating integration of defense with broader national security tools. Internationally, the US relies on its alliance network: NATO in Europe (where it leads strategic planning and force integration efforts), bilateral treaties in Asia (Japan, South Korea, Australia), and emerging groupings (the Quad with India/Japan/Australia, AUKUS). For space, the US has signed the Artemis Accords (civil space cooperation) and is exploring defense space cooperation through

forums like the Combined Space Operations (CSP) initiative with allies. Thus, the US framework is highly institutionalized and alliance-centric, with the Pentagon as a massive hub coordinating with numerous partners.

- **European Union:** Europe's institutional framework for defense is multi-layered. NATO remains the primary military command structure for collective defense, and its integration mechanisms (like the NATO Defense Planning Process and standards) bind European armies together with the US and others. Within the EU, structures have been enhanced: the European Defence Agency (EDA) coordinates capability development and training; a Directorate-General for Defence Industry and Space (DG DEFIS) in the European Commission handles programs like EDF and space policy; and the Political and Security Committee (PSC) plus EU Military Staff oversee missions and strategic coordination. A notable new institution is the European Peace Facility (off-budget fund for military aid) which has broken ground by financing lethal aid – a major shift for the EU. The Permanent Structured Cooperation (PESCO) launched in 2017 provides a framework for subsets of countries to cooperate on projects (there are dozens of ongoing PESCO projects, from joint training centers to new surveillance systems). While the EU lacks a unified military force, it is building the institutional "glue" to make European forces more coherent. Additionally, EU-NATO cooperation has intensified – they signed joint declarations in 2018 and 2023 to coordinate on military mobility, cyber defense, and countering hybrid threats, acknowledging overlapping membership and goals. In summary, Europe is strengthening *institutional bonds and funding mechanisms* to complement the alliance (NATO) that defends it.

- **Türkiye:** Türkiye's defense governance is centralized under strong executive control. The Presidency of Defense Industries (SSB) is critical for procurement and industrial policy, acting almost as an armaments ministry. The Turkish Armed Forces General Staff and branches execute military operations under the civilian Minister of Defense's oversight. Türkiye's institutional stance is unique in that it is a NATO member but not in the EU, and has had periods of tension with allies. It cooperates through NATO standardization and exercises – indeed, Türkiye hosts NATO assets like radar for missile defense and contributes a sizable military force to the alliance. At the same time, Türkiye has shown willingness to operate outside of alliance consensus (e.g., the S-400 procurement, independent interventions). Regionally, Türkiye has built coalitions or collaborations case-by-case: the Azerbaijan alliance during the 2020 Nagorno-Karabakh war, working with Russia and Iran in the Astana process for Syria (even as interests diverge), and participating in UN missions (e.g., in Lebanon, and formerly in Afghanistan under NATO). An emerging aspect of Turkish collaboration is defense exports leading to strategic ties – for example, supplying armed drones to African countries or Central Asia not only is commercial but creates lasting military relationships. Türkiye in 2025 might seek closer defense

industrial ties with willing European nations (as the IISS report hinted, relationships with Italy, the UK, Spain, Poland, and others "show promise"[50]). If Türkiye's EU accession process warms up (currently stalled), it could open doors for involvement in EU defense initiatives too. Domestically, Türkiye's military has undergone reforms especially after the 2016 coup attempt – increasing civilian oversight and reorganization (for instance, the gendarmerie and coast guard moved under Interior Ministry in peacetime). These reforms and purges had short-term impacts on personnel, but by 2025 the Turkish military is regaining experience through continual ops and modern training, helped by institutions like the National Defence University established in 2017 to consolidate military education.

A notable comparative point is how **alliances vs autonomy** play out: the US and EU see alliances (NATO, etc.) as fundamental to their security (even the US, despite its power, relies on alliances as a force multiplier). Türkiye values NATO membership but also places great weight on autonomy – a balance between institutional commitment and independent action that is trickier than the others.

Converging and Diverging Trends

Bringing the threads together, we can see converging trends among the US, EU, and Türkiye in areas like digital transformation (all are digitizing command systems and incorporating AI), multi-domain operations (NATO and the US provide a common doctrine that Türkiye also follows as part of the alliance), and militarization of space (each at different scales, but all investing in space-based defense assets). All three face the challenge of **defense-industrial base resilience** – whether it's the US grappling with supply chain and workforce issues[51][52], Europe trying to ramp up production via joint efforts, or Türkiye trying to build everything at once domestically, sustaining the industrial base is a common concern. Each is seeking to strengthen public-private partnerships and streamline procurement to deliver innovation faster.

On the other hand, diverging elements are clear in **strategy scope** (global vs regional vs hybrid), in **resource scale**, and sometimes in **alignment**. The US and EU broadly align on values and threats (democracies countering authoritarian challengers), whereas Türkiye, while a NATO ally, sometimes charts a more nationalist course that can conflict with its Western partners' policies (e.g., over Syria or relations with Russia).

Conclusion and Future Outlook

As we look toward 2025 and 2026, the defense, aerospace, and space sectors globally are set on a trajectory of rapid change and heightened significance in national strategy. The United States, European Union, and Türkiye – each in their own capacity – are responding to an increasingly volatile security environment by adopting new technologies, forging or recalibrating alliances, and shifting their military postures.

In conclusion, several overarching expectations can be drawn:

- **Continued Technological Arms Race:** The incorporation of cutting-edge technologies (AI, quantum, hypersonics, space-based assets) will accelerate. By end-2026, we may see initial operational capability of some hypersonic weapons, AI routinely assisting military targeting and logistics, and space playing an even more routine role in operations (with possible deployment of active counter-space measures if tensions rise). Nations that can effectively integrate these technologies – as the US intends to with JADC2, or the EU through collaborative projects, or Türkiye via its focused R&D – will have a strategic advantage.

- **Multi-Domain Integration Realized:** The concept of multi-domain or all-domain operations will move from theory to practice. We can expect joint exercises in 2025 and 2026 to demonstrate deeper integration: for instance, a NATO exercise where a Turkish drone relays targeting data to an American jet via a European satellite link – scenarios that validate the investments in interoperability. NATO's adoption of multi-domain thinking ensures that the US, EU militaries, and Türkiye (as a member) share a framework for fighting seamlessly together across domains, which is a critical deterrent message to adversaries.

- **Space: From Support to Potential Battlefield:** Space will further transition in perception from a support function to a potential theater of conflict. The US will likely field or at least experiment with dedicated space defense systems (non-destructive ones like jamming or cyber defense for satellites). The EU might establish a central space threat analysis center, and Türkiye could launch a military satellite or establish a space command unit. International norms for space might lag behind, raising the risk of miscalculations in orbit. However, initiatives to avoid space debris and conflict (perhaps via UN or bilateral agreements) will be increasingly urgent after witnessing ASAT tests and crowded orbits.

- **Defense-Industrial Dynamics:** The push for defense-industrial collaboration in Europe will either bear fruit or frustrations by 2026. If successful, Europe could have a more consolidated industry with joint production lines (e.g., for artillery ammo or drones), reducing duplication and dependency on external suppliers[9]. If not, old patterns of national silos may persist, undermining the "European strategic autonomy" goal. The US defense industry may undergo some consolidation or transformation as well – tech firms merging with traditional primes, etc., influenced by the need for agility. Türkiye's defense industry is likely to keep growing, potentially joining the world's top exporters if flagship products (like the Kızılelma UCAV or TF-X fighter) succeed and find foreign buyers. However, Türkiye will have to navigate export controls and geopolitical limits (e.g., not angering great powers by selling sensitive tech to rivals).

- **Geopolitical Posture and Alliances:** The period of 2025–26 will be pivotal for alliance cohesion. The US-EU partnership (primarily through NATO) will be tested by how the war in Ukraine evolves – a lasting peace or a protracted conflict – and by challenges in the Indo-Pacific that might draw US focus. Europe will need to shoulder more responsibility for its neighborhood to allow the US to handle Asia; signs of this are the increased European defense spending and initiatives to support partners in Africa and the Middle East. Türkiye's role will also be in the spotlight: its relationship with NATO could strengthen if it aligns more with Western objectives (for example, fully implementing sanctions on Russia, or contributing forces to NATO missions), or strain if divergences occur (like another unilateral operation at odds with allies). The course Türkiye chooses at this "critical juncture" for its foreign policy and defense industry orientation[16][53] will have lasting consequences for regional security and its relations with the US/EU.
- **National Security Policy Evolution:** We should anticipate updated strategic documents around 2025–26. The US likely will issue a 2026 National Defense Strategy (if the cycle holds) or interim guidance if administrations change after the 2024 election, potentially adjusting priorities (but the China/Russia focus is expected to endure). The EU might produce a second iteration of the Strategic Compass or implementation report by 2025, assessing progress on goals like the rapid deployment capacity. Türkiye may formalize a new national security strategy or defense white paper especially as its indigenous systems come online, to articulate how it will use its enhanced capabilities.

In essence, the deep research suggests that **the defense, aerospace, and space domains are increasingly interwoven and central to national strategy** in the US, EU, and Türkiye. Each is investing in more integrated, technology-driven forces to face the challenges of the mid-2020s. While their scales differ, their strategic trends show a common recognition: future security and prosperity depend on who leads in innovation, who forges strong partnerships, and who can anticipate the next domain of conflict – be it on land, in cyberspace, or beyond Earth's atmosphere.

Ultimately, success in navigating 2025 and 2026 will hinge on adaptability. Those actors that can adapt their institutions (as the EU is attempting), adapt their operations (as the US is with multi-domain concepts), and adapt their mix of collaboration vs. autonomy (as Türkiye is balancing) will be best positioned to secure their interests. This period will set the stage for the longer-term global security order, determining whether the US and its allies retain a favorable balance of power and whether rising powers like Türkiye carve out a stable, respected role in that order. The findings of this paper underscore that

strategic foresight and coordinated action in defense, aerospace, and space are more critical than ever in this “world in flux”[54] as we move through the decisive decade of the 2020s.

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