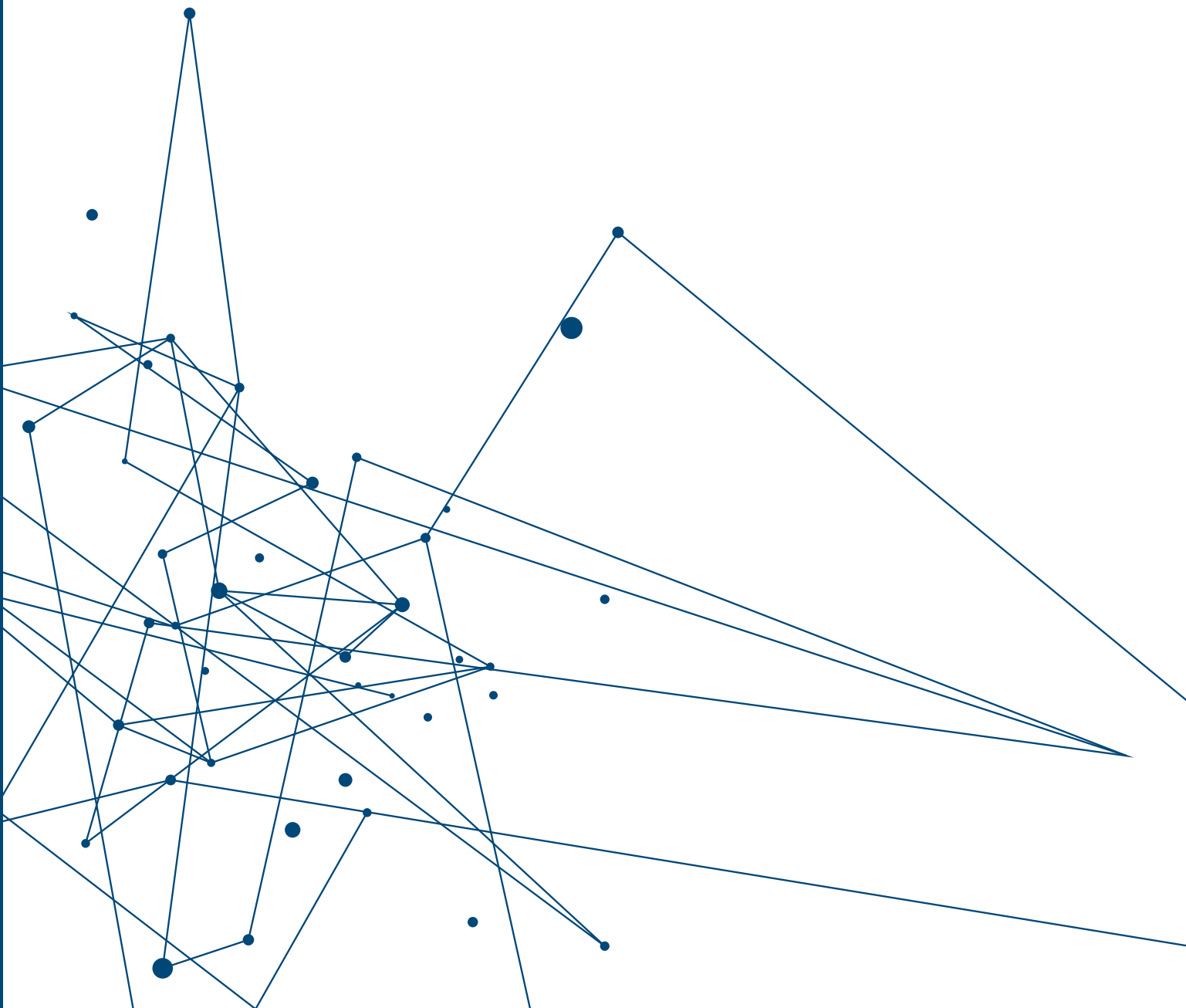


# Despite the EU: Spain's Security and Defence Cooperation with Turkey

Alberto Bueno and Eduard Soler i Lecha



This report examines Spain-Turkey relations within the broader debate on strengthening European security and defence cooperation. It explores their bilateral ties, engagement with the EU and NATO, and draws on open-source materials and interviews with 21 Spanish policy-makers, analysts, and institutional representatives. The findings indicate that Spain and Turkey have cultivated a stable and pragmatic partnership that has been largely unaffected by Turkey's tensions with other Western allies. Defence cooperation has become a key pillar, with geographical distance acting as a facilitator rather than a barrier. Overall, Spain sees Turkey as an ally in balancing NATO's strategic focus on order for the "Southern Flank" to receive due attention. Past episodes of solidarity in times of crisis have reinforced ties. Both countries are actively exploring greater collaboration at all levels – between governments, armed forces, and private companies. Despite Spain's positive stance, it lacks the leverage to shape EU-Turkey cooperation in security and defence, prioritizing bilateral engagement instead. At best, Spain could play a role in fostering dialogue and confidence-building, thus buffering persistent tensions and keeping alternative avenues for cooperation open.

This paper is part of a CATS Network Papers series exploring the role of Turkey in a future European security order, particularly in light of the EU's ongoing challenges, first and foremost the war in Ukraine. As part of this series, CATS has commissioned nine country reports on several EU member states, as well as on Ukraine and Turkey, with the aim of identifying both the opportunities and the challenges for enhanced cooperation between Turkey and the EU within an evolving security order.

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1.

# Bridging Distance, Strengthening Ties

Could geographical distance enhance a convergence of views and create broader opportunities for cooperation in security and defence? Counterintuitively, this seems to be the case when we examine Spain–Turkey relations more closely. The countries are respectively situated at the south–western and south–eastern edges of Europe, with both straddling the northern rim of the Mediterranean. The 3,000–kilometre gap has not hindered collaboration – in fact, it appears to have facilitated it. Yet, at a time when Turkey’s relations with its traditional Western allies are strained and marred by recurrent crises and controversies, Spain–Turkey relations remain stable.

Speaking at a public event in November 2019, the then Foreign Affairs Minister of Turkey, Mevlut Çavuşoğlu, even went a step further by describing relations with Spain as a “true friendship”.<sup>1</sup> In the joint press conference following the bilateral summit held in Madrid in May 2024, Pedro Sánchez similarly emphasized the “excellent state of bilateral relations” and described Turkey as a friend, partner, and an ally.

Regarding security matters, he stated that “we will continue to contribute to the defence and security of our ally for as long as necessary”, after recalling the Spanish air defence battery stationed in Turkey under NATO’s flag.<sup>2</sup> In recent months, the Spanish government has highlighted the strategic nature of relations with Turkey, reinforced by intensified defence diplomacy between both countries. All of this is taking place within a context where European countries are discussing how to collectively contain an increasingly aggressive Russia while managing the uncertainty caused by the erosion of the security guarantees traditionally provided by the United States. Defence spending and the European security architecture have become central issues, and one key question is whether Turkey should be included in this framework.

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<sup>1</sup> “Turkey’s Top Diplomat Hails Spain as ‘True Friend’”, *Hurriyet Daily News* (online), 01 December 2019, <https://www.hurriyetdailynews.com/turkeys-top-diplomat-hails-spain-as-true-friend-149310> (accessed 07 February 2025).

<sup>2</sup> La Moncloa, “Comparecencia conjunta ante los medios de comunicación del presidente del Gobierno, Pedro Sánchez, y el presidente de Turquía, Recep Tayyip Erdoğan” [Joint Press Conference by the Prime Minister of Spain, Pedro Sánchez, and the President of Turkey, Recep Tayyip Erdoğan], Press release (Madrid, 13 June 2024), <https://www.lamoncloa.gob.es/presidente/intervenciones/Paginas/2024/20240613-comparecencia-sanchez-erdogan.aspx> (accessed 13 January 2025).

More broadly, Spain's relationship with Turkey is shaped by three key factors. First, Spain views Turkey as a crucial balancing partner within NATO, countering the tendency of Central, Eastern, and Northern European countries to focus predominantly on the "Eastern Flank". This alignment reinforces Spain's broader strategic interests in bringing greater attention to the "Southern Flank". Second, Spain is willing to explore partnerships with Turkey when modernizing and expanding its defence industry. Third, Spain is advocating for more robust European Union (EU) cooperation on defence matters in which Turkey would be a partner at best. In this regard, the challenge for Spain is to leverage the new push for a more robust European defence to upgrade and create new opportunities for its own industry, while simultaneously deepening its bilateral cooperation with Turkey on security and defence matters.

This report examines the foundation of the partnership between Spain and Turkey within the security and defence agendas, focusing on their bilateral relations and interactions within multilateral frameworks, mainly the EU and NATO. Firstly, it explains Spain's main security perceptions and concerns, focusing on key dimensions and actors in Spain's defence policy arena. Secondly, the report explores how Turkey, the Turkish defence industry, and the regions where it plays a pivotal role are addressed in Spain's security and defence policies and public debates, drawing insights from official texts, public statements, and interviews with key informants – including politicians from the Spanish Parliament; senior officials from the Ministry of Foreign Affairs, the Ministry of Defence, and multilateral organizations; as well as experts from academia and Spain's defence industry. Likewise, two Turkish diplomats involved in relations with Spain were interviewed to contrast the information and the perspectives gathered in the interviews with Spanish officials.

2.

# Priorities, Policies, and Players in Spanish Security and Defence Policy

The Executive branch and the specialized administration play a key role in Spain's security and defence policy. Central to this is the prime minister, who has become increasingly dominant in shaping national security policy. For its part, the Ministry of Foreign Affairs manages Spain's alliances, international commitments, and participation in multilateral fora. Regarding the Ministry of Defence, it plays a pivotal role, providing civilian leadership and overseeing the Spanish Armed Forces (SAF), which comprise 123,067 servicemen and servicewomen. Meanwhile, the Defence Committees of both the Upper and Lower Houses primarily serve an oversight function but play a secondary role in policy-making.<sup>3</sup>

The development of security and defence policies has largely evolved under a permissive consensus as the two main political parties – Spanish Socialist Workers' Party (PSOE) and People's Party (PP) – have tended to agree on the main decisions in this area. This permissive consensus has allowed the different governments to engage in overseas operations – especially under the EU and United Nations (UN) frameworks – without facing significant domestic opposition, as long as the missions are framed within the context of multilateralism and non-combat roles. Spain's priorities reflect this political consensus as well as the transformation of the security landscape, its geographical determinants, and major societal constraints.<sup>4</sup>

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<sup>3</sup> Luis Remiro, Rafa Martínez, Alberto Bueno and Marién Durán, "Construcción de la política de Defensa en España: el impacto de la opinión pública y las elites en la formación de la agenda" [The Construction of Defence Policy in Spain: The Impact of Public Opinion and Elites on Agenda Formation], in *Repensando el papel de las Fuerzas Armadas españolas ante los nuevos desafíos a la seguridad* [Rethinking the Role of the Spanish Armed Forces in the Face of New Security Challenges], eds. Rafa Martínez and Marién Durán (Madrid: Centro de Estudios Políticos y Constitucionales [CEPC], 2024): 237–354.

<sup>4</sup> Luis Remiro, Adolfo Calatrava, Alberto Bueno and Rafa Martínez, "Political Culture and Defence Policy: A Model of Five-subtypes to Explain the Spanish Defence Political Culture", *European Politics and Society* 25, no. 5 (2024): 827–848.

## 2.1

# Security Landscape and International Cooperation

Spain's security outlook and its role within the international system have evolved significantly in order to adapt to several key developments in its neighbourhood and the global scenario: The end of the Cold War led to Spain's progressive involvement in "out-of-area" operations abroad and the adoption of a human security approach in its foreign policy. Indeed, since the early 1990s, Spain has actively participated in peacekeeping and security-sector reform missions. Spain's strategy has gradually focused on regions critical to Spanish and European security, especially the Maghreb and the Sahel, Eastern Europe, and the Eastern Mediterranean, with deployments under either multilateral frameworks – EU, NATO, UN – or bilateral agreements. Such frameworks were also influential in fostering contact between Turkey and Spain; the UN Interim Force in Lebanon (UNIFIL) in Lebanon is an example.

In general, human security has consolidated as a genuine approach in Spain's foreign and security policy.<sup>5</sup> In Spanish security and defence documents, primary risks are framed in terms of traditional and non-traditional threats. Additionally, Spain promotes confidence-building measures in defence and arms control as one of the key lines in its defence policy.

Spain's NATO membership has been marked by the struggle to get its allies to put more attention on Mediterranean security issues in order to prevent the old East-West divide from being supplanted with emerging North-South tensions. The appointment of Javier Colomina as NATO Secretary General's Special Representative for the Southern Neighbourhood is seen as a milestone that fulfils Spain's longstanding strategic goals. This appointment certainly does not immediately translate into direct actions in favour of Spain's interests, but it is a positive step in satisfying Madrid's hope for greater awareness within the Alliance about this "flank".

North Africa has long been one of Spain's main concerns. Accordingly, Spanish authorities have closely monitored cascading crises in Arab countries and the Sahel. These crises have placed Spain at the forefront of humanitarian emergencies and triggered various challenges, including global terrorism, migration and refugee flows,

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<sup>5</sup> Laia Mestres, "El largo viaje hacia la Estrategia Española de Seguridad" [The Long Journey Towards the Spanish Security Strategy], *Notes Internationals* 39 (Barcelona: Barcelona Centre for International Affairs [CIDOB], September 2011), <https://www.cidob.org/publicaciones/el-largo-viaje-hacia-la-estrategia-espanola-de-seguridad> (accessed 11 October 2024).

as well as drug, human, and arms trafficking through the Sahelian and Maghreb corridors. Concerning specifically the first issue, jihadism has become the most persistent threat, especially in the wake of the 2004 Madrid train bombings and the 2017 Barcelona attacks. The 2021 National Security Strategy highlights the ongoing threat of terrorism from radicalized individuals, both within Spain and from regions such as the Sahel, the Maghreb, and the Middle East.<sup>6</sup> The parallel experiences of Spain and Turkey in fighting against terrorism and the attempts to upgrade international cooperation in this area are some of the many elements that, as explained below, have contributed towards creating a conducive atmosphere for Spain-Turkey relations.

The growing influence of Russia and its proxies in local governments in the Sahel is perceived as amplifying these challenges.<sup>7</sup> Indeed, the Russian threat has not been overlooked by the Spanish government. Spain's contributions to the missions conducted in the Eastern Flank are frequently cited by the Executive as a prime example of its commitment to allied security.<sup>8</sup> Since the early 2000s, the SAF has been deployed in various Eastern and Central European countries, participating in operations such as Baltic Air Policing (11 rotations since 2006), Enhanced Air Policing Radar Deployment in Romania, Norwegian Advanced Surface-to-Air Missile System (NASAMS), Air Defence Units in Latvia and Estonia, and Enhanced Forward Presence in Slovakia and Latvia.

Unlike Turkey and other NATO and EU allies, Spain is geographically distant from the Ukraine conflict. Nevertheless, Madrid has supported the opening of accession negotiations with Ukraine and Moldova, in line with its traditionally pro-enlargement stance. As the focus of the EU and NATO has shifted eastward, Spain has backed increased collective support for Ukraine. However, it has also warned against an overly narrow approach that neglects the security challenges emerging from the South – many of which, such as Russian influence in the Sahel, Libya, and Sudan, are closely interconnected with the war in Ukraine. Unsurprisingly, Spain has been among the key advocates for adopting a “360-degree approach” to European security in the latest White Paper on the future of European defence.

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<sup>6</sup> Department of National Security of the Office of the Presidency of the Spanish Government (DSN), *National Security Strategy 2021* (Madrid, 2021): 57, <https://www.dsn.gob.es/sites/default/files/documents/ESN2021%20EN.pdf> (accessed 11 October 2024).

<sup>7</sup> Álvaro Ruíz, “Militares y diplomáticos advierten sobre la creciente influencia rusa en el Sahel” [Military and Diplomatic Officials Warn of Growing Russian Influence in the Sahel], *El País* (online), 28 March 2025, <https://elpais.com/espana/2025-03-28/militares-y-diplomaticos-advierten-sobre-la-creciente-influencia-rusa-en-el-sahel.html> (accessed 07 February 2025).

<sup>8</sup> “Robles dice que es ‘incuestionable’ el compromiso de España con la OTAN” [Robles States Spain’s Commitment to NATO Is “Unquestionable”], *Servimedia* (online), 18 December 2024, <https://www.servimedia.es/noticias/robles-dice-es-incuestionable-compromiso-espana-otan/1411417016> (accessed 13 January 2025).



Regarding the war in Ukraine, Madrid has joined the sanctions against Russia, its society has offered humanitarian assistance to 210,000 Ukrainians in Spain, and the government has extended its political, economic and military support to Ukrainian authorities. One of Spain's key contributions has been its involvement in the EU's military assistance efforts, particularly through the European Union Military Assistance Mission (EUMAM), the EU Training Centre for which is located in the Spanish city of Toledo. Spain has also supplied critical military equipment, including ammunition, air defence systems, and armoured vehicles, but not without hesitation: For instance, there was reluctance on the part of the government about the decision to send Leopard tanks, with the country having already met the support levels of the other allies. Furthermore, Madrid has formalized its support through a bilateral security agreement with Ukraine, pledging an additional €2 billion in assistance over the coming years.<sup>9</sup> Despite these commitments, Spain remains the second-largest contributor in absolute terms. Relative to its gross domestic product (GDP), it ranks among the lowest in terms of military, humanitarian, and financial aid to Ukraine. Spanish public opinion is in favour of providing humanitarian, political, and financial support rather than military aid.<sup>10</sup> This underscores the country's balancing act between solidarity with Ukraine and internal political and budgetary constraints on the one hand, and geographical distance and threat perceptions on the other.

## 2.2

# Geography

Although Spain's territory is primarily in Europe, it also extends into Africa with the enclaves of Ceuta, Melilla, and the Canary Islands. Spain straddles both shores of one of the world's most strategic chokepoints, the Strait of Gibraltar. Spanish threat perceptions focus on territorial disputes with Morocco over Ceuta, Melilla, and nearby islets. Furthermore, the Algeria-Morocco rivalry and their ongoing arms race pose risks to regional stability and Spain's deterrence when defending these Spanish

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<sup>9</sup> La Moncloa, "España y Ucrania firman un acuerdo bilateral de seguridad: Defensa, seguridad, paz y reconstrucción son nuestras prioridades" [Spain and Ukraine Sign Bilateral Security Agreement: Defence, Security, Peace and Reconstruction Are Our Priorities], Press release (Madrid, 27 May 2024), <https://www.lamoncloa.gob.es/presidente/actividades/paginas/2024/270524-sanchez-reunion-presidente-ucrania.aspx> (accessed 11 October 2024);

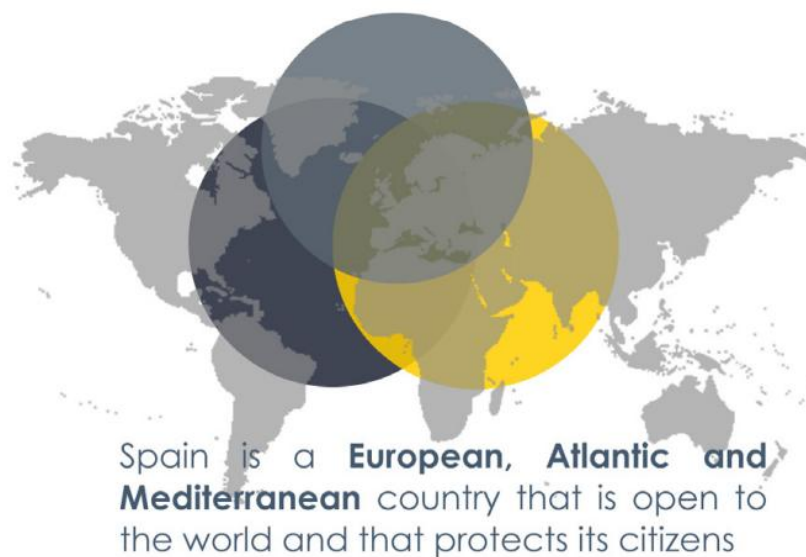
La Moncloa, "Pedro Sánchez anuncia en Kyiv un nuevo paquete de asistencia militar para Ucrania por valor de 1.000 millones de euros en 2025" [Pedro Sánchez Announces in Kyiv a New Military Assistance Package for Ukraine Worth €1 Billion in 2025], Press release (Madrid, 24 February 2025), <https://www.lamoncloa.gob.es/presidente/actividades/paginas/2025/240225-sanchez-cumbre-ucrania.aspx> (accessed 27 March 2025).

<sup>10</sup> European Commission (EC), *Opinión Pública en la Unión Europea. Informe Nacional: España* [Public Opinion in the European Union. National Report: Spain], Standard Eurobarometer 100, Autumn 2023, [https://spain.representation.ec.europa.eu/system/files/2023-12/Informe\\_EB\\_100\\_Oto%C3%B1o\\_2023.pdf](https://spain.representation.ec.europa.eu/system/files/2023-12/Informe_EB_100_Oto%C3%B1o_2023.pdf) (accessed 30 January 2025).

enclaves on the North African coast. These are regarded as “non-shared threats” in Spain’s security doctrine.<sup>11</sup>

Given this unique position – and taking Spain’s distinct self-perception into consideration – the 2021 National Security Strategy characterizes the country “as a European, a Mediterranean, and an Atlantic country”.<sup>12</sup> Spain aspires to be recognized as a “middle power” – an idea frequently used by policy-makers in Spain. As such, Spain believes that although its strictly bilateral capabilities may not suffice to defend its interests abroad, this can be accomplished through multilateral frameworks.

**Figure 1: Spain’s Geostrategic Self-Perception**



Source: Department of National Security of the Office of the Presidency of the Spanish Government (DSN)<sup>13</sup>

## 2.3 Societal Constraints

There is a persistent reluctance within Spanish society to increase defence spending, which has only slightly risen since 2022, or to support the use of military force abroad.

<sup>11</sup> Centro de Estudios de Cultura de Defensa del Ejército de Tierra (CECDET), *Las claves del porqué ante cuestiones relacionadas con la seguridad y defensa y el ejército* [Key Reasons Behind Public Attitudes on Security, Defence and the Armed Forces] (Madrid, 2023): 20–21, [https://publicaciones.defensa.gob.es/media/downloadable/files/links/l/a/las\\_claves\\_del\\_porqu\\_fo\\_lleto\\_marca\\_ej\\_rcito.pdf](https://publicaciones.defensa.gob.es/media/downloadable/files/links/l/a/las_claves_del_porqu_fo_lleto_marca_ej_rcito.pdf) (accessed 13 June 2025).

<sup>12</sup> Department of National Security of the Office of the Presidency of the Spanish Government (DSN), 2021: 2.

<sup>13</sup> Ibid.

Spanish public opinion is less supportive than the European average of EU spending on defence and does not consider defence and security a priority for the EU.

Paradoxically, though, it strongly supports the creation of a “European army”.<sup>14</sup> As a result, defence and security issues rank lower in national priorities compared to other social and economic topics. In a feedback process, a significant part of the Spanish Parliament’s Defence Committee agenda is dedicated to issues that are peripheral to core defence policy.<sup>15</sup>

Public support tends to favour Spain’s participation in EU-led security initiatives over those conducted by NATO. Another defining characteristic of Spanish public opinion on security and defence and, more broadly, on foreign affairs is the pro-European sentiment among large segments of the society – for example the support for a proposal to build a “European army” – which contrasts with a more polarized and generally more negative view of the relationship with the United States. Likewise, Spaniards have more confidence in European countries than in the United States. The return of Donald Trump to the White House – along with statements made by the president and members of his administration – has significantly heightened Spanish distrust towards the United States. Although Vladimir Putin and Russia continue to be perceived as a greater threat, the gap is narrowing.<sup>16</sup> Trust in Turkey is also notably low among Spaniards (see Figure 2). This seems to confirm the idea that the positive outlook on Turkey in the security realm is an elite-driven process rather than the reflection of a broader societal trend.

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<sup>14</sup> Luis Mejía García, “Los españoles cada vez ven mejor que aumente el gasto en defensa: esto dicen las encuestas” [Spaniards Increasingly Support Higher Defence Spending: What the Surveys Say], *Newtral* (online), 17 March 2025, <https://www.newtral.es/encuestas-gasto-defensa/20250317/> (accessed 30 March 2025);

European Commission, Autumn 2023.

<sup>15</sup> Luis Remiro, Rafa Martínez, Alberto Bueno and Marién Durán, 2024;

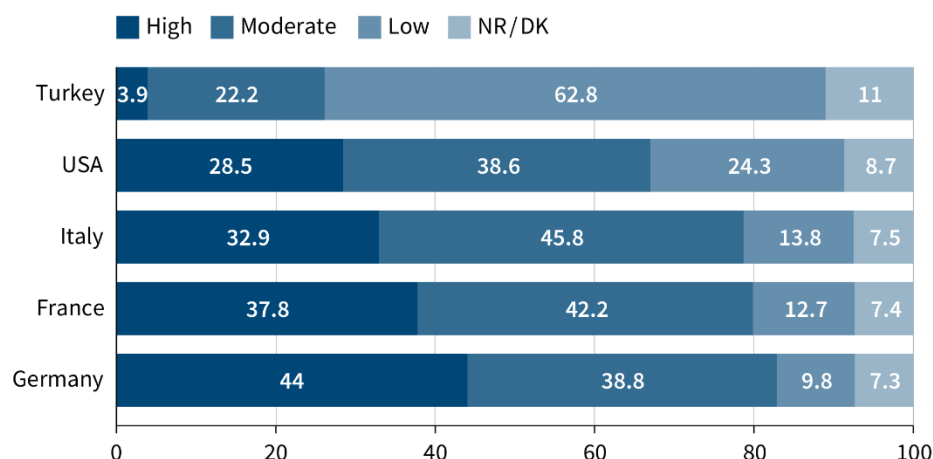
Javier Jordán, “Una aproximación a la agenda institucional de la comisión de defensa del Congreso de los Diputados español, 2001–2016” [An introduction to the Defense Committee’s agenda in the Spanish Parliament, 2004–2016], *Unidad de Investigación sobre Seguridad y Cooperación Internacional (UNISCI) Journal*, no. 44 (2017): 163–183.

<sup>16</sup> Kiko Llaneras, Javier Galán, Montse Hidalgo Perez “¿Qué dicen los europeos? Temen a Putin, desconfían de Trump y quieren crear un ejército común” [What Do Europeans Say? They Fear Putin, Distrust Trump, and Support the Creation of a Common Army], *El País* (online), 11 March 2025, <https://elpais.com/internacional/2025-03-11/que-dicen-los-europeos-temen-a-putin-desconfian-de-trump-y-quieren-crear-un-ejercito-comun.html> (accessed 30 March 2025).

Figure 2<sup>17</sup>

### Trust in NATO Member States by Spanish Society

In percent



Source: 2022 Fundación Alternativas and 40dB

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Regarding NATO, Spanish public opinion is divided, with only 45 per cent expressing favourable opinions – comparable to Turkey’s 42 per cent.<sup>18</sup> On the other hand, opinion polls reveal that Spaniards view Morocco and Russia as the main security threats, with a notable left–right divide: Right-leaning voters are more concerned about Morocco, whereas left-leaning voters see Russia as the greater threat.<sup>19</sup> Domestic governmental constraints and alliances are also crucial to understanding Spain’s stance. The Socialist government led by Sánchez faces significant pressure from its left-wing allies. The PSOE’s coalition partner, Sumar (*unite*), along with its parliamentary allies – from the far left to nationalist parties in Catalonia and the Basque Country – are much more critical of NATO and any substantial increase in military spending. However, some of them, such as Sumar, are more supportive of a European defence policy.

Nevertheless, Spain’s defence policy is fundamentally shaped by its alignment with NATO – although with historical opposition of the aforementioned parties. Together with the EU’s Common Security and Defence Policy, these stand as the two hallmarks of its strategic orientation. In this context, multilateralism and consensus-building are not merely instrumental but are pursued as ends in themselves. Traditionally, NATO has played a decisive role in shaping Spain’s defence agenda,<sup>20</sup> serving as both a strategic and operational pillar for the SAF. Notwithstanding, the EU holds particular

<sup>17</sup> Fundación Alternativas and 40dB, *¿Qué amenazas enfrenta la seguridad de España y quién la protege?* [What Threats Does Spain’s Security Face – and Who Protects It?] (Madrid, January 2022): 18, <https://fundacionalternativas.org/wp-content/uploads/2022/07/1cad52dd91f14a0e26bdd730cbab46db.pdf> (accessed 13 January 2025).

<sup>18</sup> Jacob Poushter, Moira Fagan and Sneha Gubbala, *Views of NATO* (Washington D.C.: Pew Research Center, 02 July 2024), <https://www.pewresearch.org/global/2024/07/02/views-of-nato-july-24/> (accessed 13 January 2025).

<sup>19</sup> Fundación Alternativas and 40dB, January 2022.

<sup>20</sup> Luis Remiro, Rafa Martínez, Alberto Bueno and Marién Durán, 2024.

significance, as its security and defence initiatives generate less political friction domestically and enjoy broad support from Spain's strongly pro-European elites, mainstream political parties, and the population at large. Spain's approach has been to balance both frameworks, advocating for a stronger European pillar within NATO. For sure, the current tensions with the United States present a great challenge, but they also reinforce Spain's commitment to further deepening European defence integration, specifically in the technological realm.

3.

## Military Modernization and Defence Industry

All of these developments have taken place amid an intense process of modernization and adaptation of SAF capabilities. In the second half of the 1990s, new systems and platforms were acquired: Eurofighter jets, submarine programmes (S-80 class), multi-purpose aircraft-carrier landing helicopter docks (LHD *Juan Carlos I*), frigates (F-100 class), military transport aircraft (A-400M), helicopters (NH-90) and satellites, among other items. The German Leopard battle tanks were also procured during this period, followed by a specific national version: Leopard 2E.<sup>21</sup> Likewise, from 2004 onward, the process of military transformation began in order to align the structure, organization, and capabilities of the SAF in accordance with NATO's directives. In 2021, the Ministry of Defence launched a new investment cycle that includes new military programmes: S-80 submarines, F-110 frigates, 8x8 Wheeled Armoured Combat Vehicle (VCR Dragón), new combat aircraft, air-to-air and anti-tank guided missiles, as well as the modernization of systems.

A strategic line of action of the Ministry of Defence is the promotion of an innovative defence industry that is capable of developing a national industrial base – also articulating a “national champion” able to compete in international markets – as well as integrating into multinational projects and business groups, especially within the EU. In this regard, a new Defence Industrial Strategy was launched in 2023. One of the main challenges is the structure of the military industrial sector in Spain, which is characterized by its significant fragmentation. Therefore, those modernization efforts have tried to strengthen “anchor” companies – such as Airbus (which accounts for nearly 60 per cent of the total turnover of Spain's defence industry), Navantia, Santa Bárbara Sistemas, and Indra<sup>22</sup> – to bolster the ecosystem. Indra has been chosen to become the Spanish “national champion”.<sup>23</sup>

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<sup>21</sup> In March 2025, the Spanish company Indra, together with German Rheinmetall Electronics, signed an industrial agreement to pursue the upgrading of the combat systems of these battle tanks. At the same time, Spain has shown interest in acquiring the new Leopards 2A8.

<sup>22</sup> Airbus is only 4 per cent owned by the Spanish government and Santa Bárbara Sistemas, while Santa Bárbara Sistemas is part of the American company General Dynamics European Land Systems.

<sup>23</sup> Carlos Drake, “Indra, el germen del ‘campeón nacional’” [Indra: The Seed of a “National Champion”], *Expansión* (online), 08 August 2024, <https://www.expansion.com/directivos/2024/08/08/66b3e894e5fdea0e7f8b4593.html> (accessed 15 February 2025).

The defence industry employs more than 500,000 people – considering direct and indirect jobs – and it contributes around 1.4 per cent to the Spanish GDP. In terms of exports, Spain ranks eighth in the world, primarily exporting to NATO countries, mainly due to contracts for major defence platforms. In recent years, there has been a noticeable increase in sales of vessels to Turkey, Saudi Arabia, and Australia.<sup>24</sup> This fact is particularly relevant when examining the bilateral relations between Spain and Turkey: According to statistics from the Spanish Ministry of Economy, Commerce and Business on exports of defence materials, other materials, and dual-use products and technologies, Spain's exports to Turkey have grown over two decades, representing around 1 per cent of total exports, with occasional periods of growth of more than 3 per cent.<sup>25</sup> These sales peaks are due to the acquisition of large platforms such as the LHD vessel.

However, both the military transformation and the financial commitments to modernization were disrupted by the severe economic crisis that began in 2008. The new investment cycle aims to break this trend but remains shaped by this backdrop.<sup>26</sup> That recession – combined with the longstanding effects of the so-called peace dividends during the 1990s and a lack of political will – has prevented Spain from ever meeting the defence spending commitments agreed upon with its NATO allies. In contrast to Turkey, Spain consistently ranks among the NATO members with the lowest levels of defence expenditure relative to GDP, falling short of the Alliance's 2 per cent target (Figure 3). It is a poor performance that it seeks to offset through its ambitious contributions to missions.<sup>27</sup> Only in recent years has military spending increased, reaching around 1.3 per cent of GDP; since the war in Ukraine began, the defence budget has surged by 26 per cent, but the structural financial constraints remain.<sup>28</sup>

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<sup>24</sup> Alberto Bueno, "La industria española de defensa: condicionantes políticos, económicos y sociales, y configuración sectorial" [The Spanish Defence Industry: Political, Economic and Social Conditioning Factors and Sectoral Configuration], in *La industria española de defensa en la Unión Europea [The Spanish Defence Industry in the European Union]*, ed. Christian D. Villanueva-López, (Strasbourg: Renew Europe, 2024): 46–59.

<sup>25</sup> Authors' calculations based on data from the Ministry of Economy, Commerce and Business of Spain, *Informes estadísticos [Statistical Reports]*, [https://comercio.gob.es/ImportacionExportacion/Informes\\_Estadisticas/Paginas/Historico\\_Material\\_Defensa.aspx](https://comercio.gob.es/ImportacionExportacion/Informes_Estadisticas/Paginas/Historico_Material_Defensa.aspx) (accessed 25 March 2025).

<sup>26</sup> Guillem Colom Colom-Piella, "A New Debt Burden for Spain's Defence Planning", *RUSI Journal* 164, no. 7 (2019): 32–41.

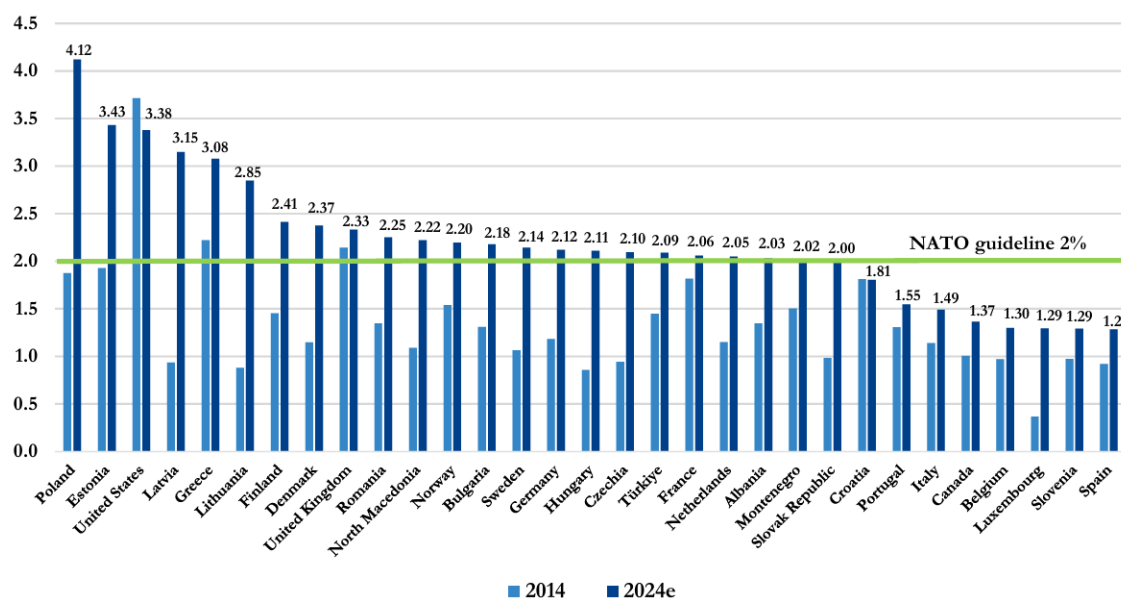
<sup>27</sup> Alvaro Caballero, "La 'paradoja' española en la OTAN: a la cola en gasto militar y a la cabeza en participación en las misiones" [The Spanish "Paradox" in NATO: Last in Military Spending, Leading in Mission Participation], RTVE (online), 30 May 2022, <https://www.rtve.es/noticias/20220530/paradoja-espana-otan-cola-gasto-militar-cabeza-misiones/2351920.shtml> (accessed 17 February 2025).

<sup>28</sup> Antonio Fonfría and Carlos Calvo González-Regueral, *El futuro de la financiación de Defensa: ¿una odisea política?* [The Future of Defence Financing: A Political Odyssey?], ARI 42/2023 (Madrid: Elcano Royal Institute, 2023), <https://media.realinstitutoelcano.org/wp-content/uploads/2023/05/el-futuro-de-la-financiacion-de-defensa-una-odisea-politica.pdf> (accessed 20 March 2025).



**Figure 3: Defence Expenditure as a Share of GDP**

In percent <sup>29</sup>



Source: NATO<sup>30</sup>

Despite this growth, the Spanish government remains highly reluctant to increase military spending and, even more so, to surpass the 2 per cent GDP threshold for defence expenditure. Alongside Italy, Spain has rejected the European Commission's "ReArm Europe" plan, prompting a change in its title to "Readiness" – a linguistic shift that reflects the political unease surrounding the issue. This reluctance extends to Spain's opposition to the proposed €40 billion military aid package for Ukraine. Such decisions underscore Spain's cautious stance on defence and military matters within the European context, despite growing security concerns across the continent.

Spain's position is influenced not only by its geographical distance from Russia but, more crucially, by financial and the aforementioned domestic political constraints. Indeed, fiscal limitations weigh heavily on policy choices, with Spain's high public debt and the absence of a General State Budget for both 2024 and the foreseeable future – as the Executive does not wish to present them due to the lack of support in the Parliament – further restricting room for manoeuvre. As a result, Prime Minister Sánchez has advocated within the EU for a mutualization of European debt to finance increased defence spending. However, this proposal has thus far met with little support from other member states and EU institutions, which instead favour the "ReArm Europe" strategy.

<sup>29</sup> Percent based on 2015 prices and exchange rates.

<sup>30</sup> NATO, "Defence Expenditure of NATO Countries (2014-2024)", Press release (Brussels, 12 June 2024), 2024, [https://www.nato.int/nato\\_static\\_fl2014/assets/pdf/2024/6/pdf/240617-def-exp-2024-en.pdf](https://www.nato.int/nato_static_fl2014/assets/pdf/2024/6/pdf/240617-def-exp-2024-en.pdf) (accessed 13 January 2025).



In the specific realm of defence industrial policy, Spain has sought to align the political objectives of both NATO and the EU in terms of investment and capabilities – a complex challenge whose resolution is crucial and is seen as a key driver for the advancement of the Spanish defence industry.<sup>31</sup> A clear example of those aforementioned social constraints and this “EU factor” is Spain’s participation in the new wave of European industrial projects.

Thus, the Europeanist preference, the relatively low level of military expenditure, and this industrial potential explain Spain’s robust commitment to European initiatives such as Permanent Structured Cooperation (PESCO) and the European Defence Fund (EDF), to which Spain is one of the most important contributors, according to the number of projects in which it participates.<sup>32</sup> This is also reflected in the 2023 Defence Industry Strategy, which explicitly identifies contributing to the European defence industry as one of its key priorities.

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<sup>31</sup> Félix Arteaga, Daniel Fiott and Luis Simón, *¿A por todas? El renacer industrial de la defensa española y europea [All In? The Industrial Rebirth of Spanish and European Defence]*, ARI 29/2025 (Madrid: Elcano Royal Institute, 25 February 2025), <https://www.realinstitutoelcano.org/analisis/a-por-todas-el-renacer-industrial-de-la-defensa-espanyola-y-europea/> (accessed 30 March 2025).

<sup>32</sup> Daniel Fiott, *¿Un socio de elección? El desempeño de España en el Fondo Europeo de Defensa en 2023 [A Partner of Choice? Spain’s Performance in the European Defence Fund in 2023]*, ARI 92/2024 (Madrid: Elcano Royal Institute, 03 July 2024), <https://www.realinstitutoelcano.org/analisis/un-socio-de-eleccion-el-desempeno-de-espana-en-el-fondo-europeo-de-defensa-en-2023/> (accessed 30 March 2025).

4.

## Spain and Turkey: A Friendly and Long-lasting Cooperation

The relationship between Spain and Turkey has been marked by a steady and amicable partnership, characterized by the lack of friction or sensitive issues as well as by the relatively low level of politicization.<sup>33</sup> As a senior official interviewed noted, unlike other issues, relations with Turkey are treated as a matter of state policy, with no significant differences among mainstream political parties. This consistency projects continuity and reliability to Turkish interlocutors.<sup>34</sup> This absence of political debate not only reflects the stability of their bilateral ties but also helps preserve them, creating space for policy entrepreneurs to further strengthen the relationship. One of the Spanish diplomats interviewed characterized this relationship as being “marked by frankness and practicality”.<sup>35</sup>

Unlike Greece and Cyprus, Spain has no territorial disputes with Turkey. In contrast to Germany, Austria, and the Netherlands, the size of the Turkish community in Spain is very small – 5,542 residents according to the latest official data from 2022 – and, therefore, there is no political or social debate regarding their integration, assimilation, or their place within the national identity. Unlike France or Sweden, there are no powerful organizations representing the Armenian or Kurdish diasporas with a capacity to shape the public conversation on Turkey and, unlike France, again, Spanish and Turkish foreign policies are not in competition over sensitive areas for one or the other nation. One or more of these points were highlighted by most interviewees, who also emphasized that Spain has no “hidden agenda” with Turkey, fostering a more open and trust-based relationship.<sup>36</sup>

Spain and Turkey have cultivated a robust economic partnership, with bilateral trade reaching \$19.2 billion in 2023, marking a 15.31 per cent increase from the previous

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<sup>33</sup> Melike Janine Sökmen and Eduard Soler I Lecha, Spain, in *Feuture EU 28 Country Report* (Cologne: University of Cologne, 2017), <https://feuture.uni-koeln.de/en/eu-28-country-reports/spain> (accessed 11 October 2024).

<sup>34</sup> Interviewee 22 (March 2025).

<sup>35</sup> Interviewee 7 (January 2025).

<sup>36</sup> Interviewee 11 (January 2025).

year.<sup>37</sup> This growth underscores the deepening ties between the two nations, positioning Spain as Turkey's fourth-largest supplier and customer within the EU. Spanish investments in Turkey have been pivotal, particularly in strategic sectors. A notable example is BBVA bank, which, after acquiring an initial 24.9 per cent stake in Garanti Bank in 2010, progressively increased its ownership to 85.97 per cent by 2022.<sup>38</sup> Conversely, Turkish enterprises are making significant inroads into the Spanish market. A prominent instance is Limak Construction's contract to renovate FC Barcelona's iconic Camp Nou stadium. Collaborative ventures further exemplify the synergy between Spanish and Turkish companies. Técnicas Reunidas, a Spanish engineering firm, has been a pioneer in the energy and chemical sectors within Turkey, undertaking projects that bolster the industrial capacities of both nations. The upward trajectory of Spain-Turkey economic relations is evident, with business leaders from both countries expressing a strong commitment to enhancing this partnership. These stronger economic relations provide a conducive environment for private-sector collaborations, including in the defence industry. As one member of the Parliament said in one of the interviews, understanding the strength of Spain-Turkey relations and the minimal political friction requires one to "follow the money".<sup>39</sup>

From the Spanish perspective, Turkey is seen as vital for Mediterranean and Middle Eastern security and key to European stability, or even as a "buffer state", making it strategically critical.<sup>40</sup> One of the diplomats interviewed who has significant experience in security issues highlighted the ideas that the Mediterranean is approached by Spain as a de facto "joint responsibility".<sup>41</sup> Another official nuanced this conventional opinion by highlighting that Turkey "is a very important ally in the Mediterranean, but it's not the only one".<sup>42</sup> This strategic assessment translates into increased military cooperation with Turkey, which can also be pursued through additional opportunities for naval collaboration, as demonstrated by the exercises carried within the framework of EU NAVFOR Somalia's Operation ATALANTA, or NATO's Dynamic Mariner / Flotex 2025 exercise.

Ongoing bilateral participation in these kinds of exercises and manoeuvres fosters mutual understanding, enhances force interoperability, and strengthens operational relations between both armed forces.<sup>43</sup> According to one of the interviewees, a distinctive feature of this relationship is that the Ministry of Foreign Affairs acts less

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<sup>37</sup> Ministry of Foreign Affairs of Spain, *Commercial and Economic Relations between Türkiye and Spain*, <https://www.mfa.gov.tr/commercial-and-economic-relations-between-turkiye-and-spain.en.mfa> (accessed 13 January 2025).

<sup>38</sup> Jesús Aguado, "Spain's BBVA lifts stake in Turkish Garanti to 86%", *Reuters* (online), 18 May 2022, <https://www.reuters.com/markets/europe/spains-bbva-pays-14-bln-additional-3612-stake-turkish-lender-garanti-2022-05-18/> (accessed 15 June 2025).

<sup>39</sup> Interviewee 5 (January 2025).

<sup>40</sup> Interviewee 16 (January 2025).

<sup>41</sup> Interviewee 10 (January 2025).

<sup>42</sup> Interviewee 23 (March 2025).

<sup>43</sup> Interviewee 1 (January 2025).

as a gatekeeper, as the ties between the two defence ministers and their respective armed forces are long-standing and solid. This suggests a degree of autonomy for these actors in shaping bilateral security relations. The interviewee noted that this is not common with other countries and, to some extent, could be compared to Spain's relationship with the United States – albeit at a different scale.<sup>44</sup>

The fact that bilateral relations have been amicable does not mean that they have remained static. For instance, developments at the global level, in Europe, and in the Middle East and North Africa (MENA) region have visibly impacted bilateral relations. The most evident example was the September 11 attacks and the US invasion of Iraq in 2003, amidst a discourse on the risk of a “clash of civilizations”, which prompted the two countries to launch a joint initiative within the UN: The Alliance of Civilizations. Therefore, one should assume that ongoing transformations such as the shift towards great-power competition and unilateralism – a trend reinforced following Trump's victory in the 2024 presidential elections in the United States, the technological and industrial revolution ahead, the challenge to Europe's security order posed by Russia's war of aggression in Ukraine, and the spiral of violence in the Middle East since Hamas' 7 October attacks – have the potential of altering the importance, intensity, and/or direction of Spain-Turkey relations.

Changes within the EU also have a critical impact on the bilateral relations established by any EU member and Turkey. Since the 1980s, the bilateral relationship with Spain has been shaped by the ups and downs of Turkey's relationship with the EU, although Spain has consistently maintained a pro-enlargement stance – regardless of the government's ideological orientation – with minimal public debate. During periods of rapprochement, such as the granting of candidate status in 1999, or the steps towards opening accession negotiations in 2005, the bilateral ties between Spain and Turkey flourished. Spain also took advantage of these solid and amicable bilateral relations to try to promote EU-Turkey cooperation, particularly when assuming the rotating presidency of the Council. For instance, in 1995, Spain actively supported the adoption of the Customs Union, and in 2002, it played a constructive role in negotiations leading to the “Berlin Plus” agreement, which laid the foundation for EU-NATO cooperation in 2003.<sup>45</sup> In 2010, it also managed to overcome resistances from France, Greece, Cyprus, and other reluctant members and finally managed to open a negotiation chapter (on food security) after a prolonged period of stagnation in the accession talks. More recently, in 2023, in line with the prevailing mood within EU institutions, Spain advanced a pro-enlargement agenda, which, at least on paper, includes Turkey.

In the absence of a broader, EU-driven framework to support and deepen ties, Spain was able to position itself as a reliable partner, willing to explore new avenues to

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<sup>44</sup> Interviewee 22 (March 2025).

<sup>45</sup> Interviewee 10 (January 2025).

reinforce the relationship. This dynamic allowed Spain to stand out as a supportive ally, even as Turkey's relationship with the EU and some of its members grew increasingly strained.<sup>46</sup> One of the peculiarities of Spanish bilateral relations with other states is the fact that it aims at distinguishing those partners with whom it intends to have a more robust and comprehensive relationship by holding regular governmental summits – attended by the leaders of the Executive and includes participation by several sectorial ministers – which are called *Reuniones de Alto Nivel* (High-Level Meetings, often referred to as RAN, the acronym in Spanish).

The upgrade of bilateral relations with Turkey started in 2009. Governmental meetings are noticeably regular, and security and defence is one of the areas in which sectorial ministries are engaged in strengthening this cooperation. For instance, on the sidelines of the High-Level Meeting in 2021, Turkey offered Spain the opportunity to cooperate in the construction of a second aircraft carrier and a new series of submarines for the Turkish Navy; however, no concrete agreements have been reached yet.<sup>47</sup>

In that respect, a Turkish diplomat highlighted that

the relationship is very good, excellent. This is true across all sectors and in every area. These are relations that only continue to grow and improve. The same is true in the field of security and defence and can be seen as a clear example of the quality of the relations.<sup>48</sup>

She added a very relevant point, which is that although relations are being driven by very good cooperation at the highest level, they are also very robust at all levels, “between politicians, between officials, between armed forces, between armies (army, air force, navy, civil guard, etc.)”.<sup>49</sup> She also mentioned that the last of the aforementioned meetings confirmed and reinforced this trend. The intergovernmental meeting took place in June 2024 in Madrid with the participation of Recep Tayyip Erdoğan and Pedro Sánchez and was also attended by the defence ministers, among other sectorial ministers. The signature of 13 memoranda of understanding to strengthen cooperation between ministries and specialized agencies – although not specifically targeting the defence sector – was the most visible outcome of the 8th High-Level Meeting between both governments.<sup>50</sup> One of the

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<sup>46</sup> Interviewee 10 (January 2025).

<sup>47</sup> Miguel González, “Turquía ofrece a España cooperar en construir un ‘megaportaaeronaves’ y nuevos submarinos” [Turkey Offers Spain to Cooperate in Building a “Mega Aircraft Carrier” and New Submarines], *El País* (online), 17 November 2021, <https://elpais.com/espana/2021-11-17/turquia-ofrece-a-espana-cooperar-en-construir-un-megaportaaeronaves-y-nuevos-submarinos.html> (accessed 01 April 2025).

<sup>48</sup> Interviewee 12 (January 2025).

<sup>49</sup> Interviewee 12 (January 2025).

<sup>50</sup> La Moncloa, Pedro Sánchez: ‘Turkey and Spain Have a Common Past, a Dynamic and Ambitious Present and a Promising Future’ (Madrid, 13 June 2024),

interviewees explained that besides these 13 agreements, there are 10 more in the process of negotiation and that there could be positive novelties in defence, mentioning technology as one of the areas where there is ample room for collaboration.<sup>51</sup>

At the political level, a distinctive element in their bilateral relations is, as was emphasized by both Turkish and Spanish officials interviewed, the importance of solidarity in times of crisis. This sense of solidarity has been particularly evident in recent years, with both countries supporting each other during moments of need. Spain's response to Turkey's devastating 2023 earthquakes and Turkey's assistance to Spain during the COVID-19 pandemic exemplify how this cooperative relationship goes beyond formal agreements and extends into genuine humanitarian support. During the pandemic, Turkey was one of the first countries to respond to Spain's request for medical assistance through NATO's Euro-Atlantic Disaster Response Coordination Centre (EADRCC). Namely, it sent an A400M transport plane carrying 25 tonnes of masks, disposable gowns, and disinfectant gel.<sup>52</sup> Similarly, Spain quickly mobilized resources to assist Turkey following the 2023 earthquake, being one of the first countries to arrive. The Spanish government sent an aircraft carrier and an amphibious ship to help victims. The way in which a Turkish diplomat characterized this relationship is particularly telling. She said:

When we've needed each other, we've been able to count on one another. The Spanish help during the earthquake in Turkey is unforgettable. [...] When you truly support someone, you don't need to make it public all the time. Both countries are very aware of the importance of the State's dignity.<sup>53</sup>

One of Turkey's most sensitive issues in bilateral relations with other countries in the realm of security and defence regards international cooperation in the fight against terrorism. Again, this appears as a non-contentious issue in the bilateral relations with Spain. Madrid acknowledges that this is a major concern for Turkish society and the government. Officials interviewed argued that the past experience of Spain in dealing with both domestic terrorism – mainly the threat posed by ETA (which stands for “Euskadi Ta Askatasuna”, “Basque Country and Freedom” in Basque), until 2018 – and jihadi groups that have committed major attacks, such as those in Madrid in 2004 and Barcelona in 2017, and actively recruited Spanish nationals or residents, seems to predispose Spain to be more empathic with Turkey than other countries that have been less exposed to domestic terrorism. One of the interviewees nuanced this general picture by explaining that the perception of Spain about the nature of the

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<https://www.lamoncloa.gob.es/lang/en/presidente/news/paginas/2024/20240613-spain-turkey-intergovernmental-summit.aspx> (accessed 01 April 2025 ).

<sup>51</sup> Interviewee 12 (January 2025).

<sup>52</sup> NATO, “Coronavirus Response: Turkish Medical Aid Arrives in Spain and Italy” (Brussels, 1 April 2020), [https://www.nato.int/cps/en/natohq/news\\_174826.htm](https://www.nato.int/cps/en/natohq/news_174826.htm) (accessed 10 November 2024).

<sup>53</sup> Interviewee 12 (January 2025).

threat or how to combat it may be different, but not to the extent of hampering the relationship.<sup>54</sup> Another informant evocatively compared the degree of convergence of views regarding terrorism, saying that the “melody is the same, but the lyrics are different”.<sup>55</sup>

Overall, the bilateral relationship is excellent. This is true across all sectors and areas – following a non-partisan policy on the Spanish side – and these ties continue to grow and strengthen, according to all the informants interviewed for this report. When, within the framework of this project, we asked informants – both Spanish and Turkish officials, politicians, and civil society representatives – if there were specific individuals or units within Spain’s public administration or government with a distinct interest in Turkey, advocating for a “Turkish agenda” within Spanish policies, or urging their colleagues to focus more attention on Turkey, the consistent answer was that there are no significant differences across the Spanish government or administration.

There are no specific individuals or bureaucratic units actively promoting or resisting the development of these relationships. Some of the academics, think-tank experts, and even parliamentarians we interviewed pointed out this paradox: Precisely because Turkey is not a contentious issue in Spain, there has been no perceived need to build specialized expertise on Turkey within the central structures of government.<sup>56</sup> This reality contrasts sharply with countries such as France, Germany, and Greece, where relationships with Turkey are far more complex, and where such specializations exist. The situation is markedly different in the private sector – particularly within the defence industry. As key interest groups, defence companies actively advocate for closer ties and seek greater government alignment towards cooperation with Turkey, driven by strategic and commercial incentives.<sup>57</sup>

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<sup>54</sup> Interviewee 9 (January 2025).

<sup>55</sup> Interviewee 10 (January 2025).

<sup>56</sup> Interviewees 3, 4, and 5 (January 2025).

<sup>57</sup> Interviewees 1, 11, and 17 (January 2025); interviewees 19 and 21 (March 2025).



5.

# Security and Defence Cooperation Within NATO Framework: Bilateral and Multilateral Settings

NATO represents the foremost multilateral framework for military and defence cooperation between Spain and Turkey. It serves as a forum where both nations maintain strong relations – a perspective widely acknowledged in Spain. A telling anecdote, mentioned by four different interviewees, highlights how the alphabetical seating arrangement in NATO meetings has often led to close and informal interactions between representatives of both countries – interactions that have proven highly beneficial.<sup>58</sup>

However, in line with a shifting perception of Turkey and its grand strategy, many interviewees also referred to Turkey as a strategic dilemma. This shift involves assessing Turkey's policy in a more assertive manner, with greater ambition and a smart power approach that does not hesitate to resort to military power in its broadest sense: defence diplomacy, military industry partnerships, support for proxies in conflict-affected third countries, etc. Over the past decade, Turkey's pursuit of greater influence to establish itself as a regional power – an ambition widely recognized in Spain – has intensified its frictions with some European countries such as France and the United States, both of which have been traditional allies of Spain. Recently, potential grievances – such as Turkey's purchase of S-400s, its role played in the Libyan and Syrian civil wars, or its refusal to join the EU's sanctions regime against Russia – were interpreted by the interviewees as part of the reconfiguration of Turkish foreign policy, reflecting the complexity of finding Turkey to be a relevant partner with whom it remains necessary to cultivate good relations.

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<sup>58</sup> Interviewees 6, 7, 8, and 9 (January 2025).



On the contrary, the poor current relations between Spain and Israel make the closeness of ties with Turkey even more valuable.<sup>59</sup>

This dynamic raises a strategic uncertainty regarding the extent to which Turkey can be considered a reliable ally for the Western Alliance and its engagement with third states. Nonetheless, despite these reservations, all informants emphasized Turkey's role as a major player in the security of both Europe and the MENA region – a player that has become indispensable for dealing with refugee flows, humanitarian crises, and terrorist threats.

Based on our fieldwork, it is fair to assume that Spanish officials place great value on its bilateral relations with Turkey. Understanding the rationale behind Spain's perception of Turkey requires considering critical factors related to Turkey's role within the European security order. Spanish interviewees from various government departments and professional backgrounds converge on four key aspects:

- 1) the Mediterranean area,
- 2) the Southern Flank,
- 3) diplomatic strategy, and
- 4) counterterrorism.

Firstly, and previously underlined, geographical distance is a positive factor in Spain-Turkey relations, as it prevents a direct conflict of interests within the Alliance. The Mediterranean is perceived as a connecting space where there is an implicit division of attention and spheres of interest and/or influence. Spain acknowledges Turkey's predominant role in the Eastern Mediterranean and considers it to be a security provider in that region. Moreover, the fact that – unlike other allies such as France or even the United States – Spain has not engaged in particularly strong cooperation efforts in the realm of defence with Greece, enables Madrid to have this positive outlook concerning the role that Turkey plays or could play in the Eastern Mediterranean, as well as helps minimize potential points of friction. Yet, Spanish authorities have invested diplomatic efforts in ensuring that neither Athens and Nicosia nor Spain's international partners perceive its positive relations with Turkey as a hostile move.<sup>60</sup> Conversely, Madrid views Turkey's relatively limited engagement in the Western Mediterranean positively, particularly regarding Morocco and Algeria, the two countries of most concern to Madrid. Turkey's activism could have led to undesired tensions, as evidenced in the case of the deterioration of relations with France and Greece regarding Libya.

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<sup>59</sup> Interviewee 19 (March 2025).

<sup>60</sup> Interviewee 22 (March 2025).

Secondly – and closely linked to the goal of a stable Mediterranean – for Madrid, Turkey plays a crucial role in reinforcing the strategic importance of NATO’s Southern Flank, ensuring that it remains a priority for the Alliance. In this regard, Turkey serves as a “balancing partner”<sup>61</sup> for Spain, countering the tendency of Central, Eastern, and Northern European countries to concentrate attention on the “Eastern Flank”. From a Spanish perspective, Turkey’s growing presence in Africa – not even in the Sahel – does not generate significant concern.<sup>62</sup> The NATO Madrid Summit in 2022 and the institutional upgrade of the Southern Neighbourhood within NATO are considered significant achievements, in which Turkey’s constructive role has been duly recognized. Indeed, this shared strategic approach to sensitive issues is one of the key assets underpinning Spain–Turkey relations.

Thirdly, diplomatic politics represent another crucial dimension of this partnership. The absence of the aforementioned “hidden agenda” or historical grievances between the two nations facilitates open and straightforward diplomatic exchanges. This translates into the fact that, in many negotiations, it ensures a starting point of “no veto” from Turkey for the pursuit of Spanish interests.<sup>63</sup> Additionally, Spain or Spanish nationals individually are well-placed to act as facilitators or even mediators to de-escalate tensions.

Finally, one particularly significant yet sensitive area in bilateral relations is counterterrorism. Given that both Spain and Turkey have long faced persistent domestic security threats, their cooperation on this issue within NATO has traditionally been strong. From Spain’s perspective, Turkey’s role in counterterrorism is seen as a valuable contribution to transatlantic security, particularly regarding the fight against jihadism.

With regard to a bilateral military agenda, Spain and Turkey annually agree on a comprehensive Bilateral Cooperation Plan, which includes academic and training activities, exercises, manoeuvres, and other initiatives of mutual interest to both armed forces.<sup>64</sup> This positive atmosphere has been further reinforced by intensified defence diplomacy in recent months, highlighting the strong state of bilateral relations. Notable examples include the visit of the Turkish Joint War Institute to Spain’s CESEDEN,<sup>65</sup> as well as the Spanish Chief of the Army Staff’s visit to the

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<sup>61</sup> Interviewee 11 (January 2025).

<sup>62</sup> Eduard Soler i Lecha, *Spain Is Not Afraid of Turkey in Africa*, CATS Network Paper, no. 8/2024 (Berlin: Centre for Applied Turkey Studies 19 July 2024): 8., [https://www.cats-network.eu/assets/cats/CATS\\_Network\\_Paper\\_Briefs/CATS\\_Network\\_Paper\\_No.\\_08\\_19.07.2024.pdf](https://www.cats-network.eu/assets/cats/CATS_Network_Paper_Briefs/CATS_Network_Paper_No._08_19.07.2024.pdf) (accessed 17 February 2025).

<sup>63</sup> Interviewee 11 (January 2025).

<sup>64</sup> Interviewee 1 (January 2025).

<sup>65</sup> Ministerio de Defensa de España, “Visita del Instituto de Guerra Conjunta de Turquía” [Visit of the Turkish Joint Warfare Institute], 27 January 2025, <https://www.defensa.gob.es/ceseden/-/visita-del-instituto-de-guerra-conjunta-turquia> (accessed 17 February 2025).

commander of the Turkish Land Forces in January, aimed at strengthening bilateral ties and collective defence within NATO.<sup>66</sup>

Among all of the military initiatives, the most significant within the NATO framework is the deployment of the Patriot air defence battery at Incirlik Air Base as part of the NATO's Operation Active Fence – Persistent Effort: Support to Turkey mission. This deployment has been emphasized by the Spanish government and diplomatic authorities, as well as by all interviewees in this report. Spain decided to send the battery in December 2014 to ensure Turkey's security at a time of severe instability on its southern border due to the Syrian civil war and the rise of ISIS. The battery arrived in January 2015, and since then, 21 handovers have taken place, involving the deployment of nearly 3,000 Spanish military personnel. It has become one of the longest-running missions for the SAF, particularly for the Army – ten years of commitment that are explicitly praised by Turkey<sup>67</sup> and highlighted in Spain.<sup>68</sup>

Among some members of the defence community, this deployment remains a sensitive issue for Spain from both strategic and operational perspectives, particularly regarding the rationale for maintaining it in 2025. Firstly, there are concerns over whether it weakens Spain's deterrence and defence capabilities by keeping a battery permanently stationed abroad for a decade. Secondly, the decline of ISIS and the improved security situation raise questions about its continued necessity. Indeed, in 2024, the spokesperson for the main opposition party, PP, – during whose government it was decided to initiate the mission – questioned in the Defence Committee of the Congress of Deputies the suitability of maintaining the mission, given that “the threat [to Turkey's national security] is non-existent”. However, Turkish officials interviewed in this report emphasized that regional insecurity persists – exacerbated by the ongoing Israel-Gaza conflict – making the battery a highly valued asset. The level of commitment is such that, when Ukraine requested the transfer of this battery from Incirlik to its armed forces, Spain refused, as publicly stated by the Spanish prime minister (see Introduction). This decision also implies that the presidency of the Government highlights the benefits of this deployment over any potential drawbacks

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<sup>66</sup> Ministry of Defence of Spain (@EjercitoTierra), “#Buenasnoches. El Jefe de Estado Mayor del Ejército de Tierra, general de ejército [...]” [@SpanishArmy, “#Goodnight. The Chief of Staff of the Army, Army General...], X, 13 January 2025, <https://x.com/EjercitoTierra/status/1878897671559057915> (17 February 2025).

<sup>67</sup> SavunmaSanayiST (@SavunmaSanayiST), “İspanya Savunma Bakanı Robles, 10 senedir NATO görevi kapsamında Türk hava sahası için İncirlik Hava Üssü'nde konuşlu olan İspanyol Patriot bataryasını ziyaret etti” [Spanish Minister of Defence Robles Visited the Spanish Patriot Battery Stationed at Incirlik Air Base Under NATO Duties for 10 Years in Turkish Airspace], X, 20 February 2025, <https://x.com/SavunmaSanayiST/status/1892460499557601299> (accessed 30 March 2025).

<sup>68</sup> Ministry of Defense of Spain (@Defensagob), “Nuestro país cuenta con 138 militares desplegados en la operación #ApoyoATurquía [...]” [Our Country Has 138 Military Personnel Deployed in the #SupportTurkey Operation], X, 19 February 2025, <https://x.com/Defensagob/status/1892207906486899128> (accessed 30 March 2025).

Regarding the political, strategic, and operational justification for this deployment, several arguments have been put forward by Spanish officials: firstly, and above all, Spain's commitment to collective security and its contribution to NATO's "Persistent Effort" mission. Secondly, there is the bilateral commitment to Turkey, positioning the deployment as a diplomatic tool to strengthen relations; there is trust within the community, and the interviewees asserted that this is a vector in the good relations between the two countries, that the continued contribution to Turkish air defence will bring benefits, potentially in the form of a strategic partnership between the defence industries of the two countries. In this context, Turkey's references to Spain as a reliable ally should be understood. Thirdly, there are the strategic-operational benefits, as the battery's radar allows Spain to monitor the regional airspace and gather intelligence for both national and allied use. Finally – and beyond the trade-offs in terms of military deterrence associated with maintaining a permanently deployed battery – there are the operational and doctrinal considerations, as the handovers through Adana provide Spanish personnel with first-hand experience in Patriot systems, enhancing training and readiness.

6.

## Spain's Perception on Turkey's Role Within the EU

Although the EU is central to both Spain and Turkey, it plays a relatively minor role in their bilateral security and defence cooperation. In the absence of a strong EU framework, as outlined earlier, NATO and strictly bilateral cooperation emerge as more appealing avenues for both countries, as they are seen as potentially fertile grounds that could yield positive outcomes.

In fact, the EU dimension is often perceived by the Spanish diplomatic and security establishment as a potential irritant. The reasons for this are explained in previous sections and can be summarized as the existence of various veto players within the EU who, in contrast to Spain, view Turkey as a threat, a rival, or even an aggressor. The Republic of Cyprus stands out as the most obvious case, but other interviewees also mentioned France and Greece as countries with antagonistic relations with Turkey. They highlighted that these countries have a markedly different perception of Turkey compared to the one that prevails in Spain.<sup>69</sup> At the same time, this situation has turned the EU from a space of hope to one of despair for Turkey,<sup>70</sup> fuelling frustration and irritation in decision-making circles in Ankara. Nonetheless, the “Cypriot controversy” has been another case of Spanish mediation. For instance, for critical incidents such as gas drilling in Cyprus, whereas France and the United States pushed for sanctions against Turkey over alleged violations of national waters, Spain adopted a more mediatory stance rather than a confrontational one.<sup>71</sup>

Another clear example is the fact that Turkey has not been invited to participate in PESCO projects, unlike other non-EU NATO members such as Canada and Norway. The fact that one of the projects that Canada has been invited to join, NetLogHubs, is coordinated by Germany, France, and Cyprus may make Turkey's exclusion an even more sensitive matter. Spain acknowledges Turkey's perception of discrimination or

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<sup>69</sup> Interviewees 8 (January 2025), 22, and 23 (March 2025).

<sup>70</sup> Ediard Soler i Lecha, “Hope and Despair: Understanding Change in Turkey-EU Relations”, *Uluslararası İlişkiler Dergisi* 20, no. 78 (2023): 21–42.

<sup>71</sup> Interviewee 16 (January 2025).

exclusion but regards this as an unavoidable reality.<sup>72</sup> It recognizes both its limited capacity to change the situation and the greater importance of fostering consensus within the EU – with the latter being a key point for Spanish interests. Nevertheless, Spain sees no reason to oppose Turkey’s potential cooperation with PESCO. As explained earlier, Spain is particularly active in this framework but has not been able to take advantage of it to meet Turkey’s expectations.

Spain understands this frustration but feels unable to address or resolve it. Considering the magnitude of these challenges, Madrid has not attempted to convince the veto players within the EU to change their stance, as it does not believe it has the leverage to do so, something that Turkish officials privately lament but also seem to understand.<sup>73</sup> It has not actively promoted Turkey’s inclusion in EU foreign and security policy mechanisms, as Madrid perceives such efforts as bound to fail. This does not mean that Spain has no preferences; it does, but it is not able to turn them into actions.

One of the things that Spain has consistently done is use every possible opportunity to reiterate its position that Turkey–EU relations should be as strong as possible. Spain maintains that Turkey should be treated fairly as a candidate country, while also acknowledging that, like any other candidate, it must meet all membership criteria. This position has remained constant, regardless of the political changes in Spain. One of the most recent examples of this stance can be found in the joint conference held by the leaders of Spain and Turkey during the government summit in Madrid in 2024. There, Sánchez presented Spain as “a strong advocate of a constructive rapprochement between Turkey and the European Union” and recalled that

during our recent Spanish Presidency, the joint communication from the High Representative of the European Union, Josep Borrell, and the European Commission was presented to establish a positive agenda aimed at reviving dialogue on strategic issues such as migration, customs agreements, and energy policy.<sup>74</sup>

Interestingly, even this document that Sánchez presented as a positive step used a very cautious and sceptical tone when addressing issues related to Common Foreign and Security Policy. For instance, the joint communication acknowledges Turkey’s contributions to Common Security and Defence Policy missions in the Balkans, but it immediately underscores its exclusion of a member state from NATO cooperation, framing it as a persistent obstacle. Similarly, while recognizing Turkey’s role in counter-terrorism efforts, the text emphasizes that its broad definition of terrorism contradicts European standards and the European Convention on Human Rights. Furthermore, the reference to the need for Turkey to commit “to advance on a path of

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<sup>72</sup> Interviewee 4 (January 2025).

<sup>73</sup> Interview for a different project with a high-ranking Turkish official in 2021.

<sup>74</sup> La Moncloa, 13 June 2024.

cooperation and de-escalation” is particularly telling.<sup>75</sup> The term “de-escalation” is typically associated with managing tensions with an adversary, not with a partner; this choice of language reflects a reluctance to present cooperation in a wholly positive light, instead highlighting ongoing tensions and constraints.

Despite these constraints, Spain tried to boost the EU’s “positive agenda” with Turkey during its presidency of the Council, specifically advocating for visa facilitation and increased political dialogue. Although there were no tangible results during the presidency, one interviewee noted positive developments that appeared later, suggesting that Spain’s positions had gained some traction. This was evidenced by the invitation and participation of the Turkish foreign affairs minister in a Gymnich (informal) meeting of EU ministers – a significant development, as this had been standard practice until 2019.<sup>76</sup>

In fact, the years 2019–2021 saw a peak in tensions in the Eastern Mediterranean. Turkey’s drilling activities led the EU to impose sanctions (“restrictive measures” in EU jargon). As part of the EU, Spain had to take a position on these measures. In EU discussions, Spain consistently advocated maintaining relations with Turkey and avoiding a rupture. Yet, in line with its limited appetite for being perceived as an obstructionist or troublemaker within the EU, vetoing these sanctions was never seen as a viable option. Instead, Spain sought to prevent that point being reached and, in coordination with Germany, actively mediated between Ankara, Athens, and Nicosia. These mediation attempts were recalled by some informants and covered in the Spanish press.<sup>77</sup> One of the most relevant individual players, according to the interviewees, was Juan González-Barba. He was then State Secretary for European Affairs, had diplomatic experience both in Greece and Turkey, and was one of the key individuals engaged in this process.<sup>78</sup> A senior diplomat looked retrospectively at these efforts and stated that “most likely, this is not the stance that Turkey would wish for, but they know that ours is not a hostile position, and they know that we recognize the role and importance that Turkey has”.<sup>79</sup>

Finally, Spain has also made efforts to improve relations between Turkey and the EU as a whole, particularly in the context of EU–NATO cooperation, which, as shown in the 2023 communication, remains a major stumbling block. As discussed in previous sections, Spain played a constructive role in the 2002 negotiations between Turkey

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<sup>75</sup> European Commission (EC) and High Representative of the Union for Foreign Affairs and Security Policy, *Joint Communication to the European Council: State of Play of EU–Türkiye Political, Economic and Trade Relations*, JOIN (2023) 50 final (Brussels, 29 November 2023), <http://bit.ly/3I1eBK4> (accessed 11 February 2025).

<sup>76</sup> Interviewee 20 (March 2025).

<sup>77</sup> Andrés Mourenza, “Alemania y España median para reducir la tensión en el Mediterráneo oriental” [Germany and Spain Mediate to Reduce Tensions in the Eastern Mediterranean], *El País* (online), 04 August 2020, <https://elpais.com/internacional/2020-08-04/alemania-y-espana-median-para-reducir-la-tension-en-el-mediterraneo-oriental.html> (accessed 2 April 2025).

<sup>78</sup> Interviewee 4 (January 2025).

<sup>79</sup> Interviewee 11 (January 2025).



and the EU, which led to the “Berlin Plus” agreement in 2003. This agreement established the conditions under which NATO members would allow the EU to utilize NATO’s assets and capabilities for its own operations. Informants have explained that, besides attempting to persuade Turkey to lift its veto for NATO accession on two EU member states – Sweden and Finland – Spain has also sought to create more conducive conditions for EU–NATO cooperation. Although there was little hope or expectation of concrete measures, Spain aimed to demonstrate that political dialogue was possible. In this regard, Spain managed to convince Turkey to participate in a dinner for EU and NATO leaders in which, among others, Cypriot President Nicos Anastasiades would take the floor. Despite initial reluctance, Turkey agreed to attend, making it clear to its interlocutors that this was a sign of goodwill in recognition of Spain’s long-lasting friendship. Turkey also emphasized to other countries – who later attempted to replicate similar dialogue spaces – that the event in Madrid was an exceptional one.<sup>80</sup>

All of these positive gestures from Spain towards Turkey, which were reciprocated by Ankara, should not mislead observers, as Spanish officials emphasized in their interviews. Firstly, although Spain is calling for stronger EU–Turkey relations, diplomats in Madrid and Brussels are not particularly optimistic about the future of these relations, at least in the short term.<sup>81</sup> One of them stated that Spain does not hold the key that would unlock greater defence collaboration.<sup>82</sup> Spain’s attitude is of damage control rather than actively resolving the problem. Secondly, regardless of Spain’s good relations with Turkey, this does not mean that both countries see eye-to-eye on EU–NATO relations. As one informant summarized:

It is important to make a very significant clarification about what differentiates our views and those of Ankara, what we do not agree on: Spain is a pro-European country; it wants a stronger European defence pillar, pivoting around the European Union. Turkey insists that it must be included in this pillar, but it is not an EU member and will not be part of this pillar until it joins the EU as a full member. As a result, Turkey views any initiative within the EU, initiatives that we in Spain are in favour of, as aimed at excluding it. This is not the goal of these initiatives, but it is how Turkey perceives them and while we don’t agree we can understand how they feel.<sup>83</sup>

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<sup>80</sup> Interviewee 8 (January 2025).

<sup>81</sup> Interviewees 7 (January 2025) and 20 (March 2025).

<sup>82</sup> Interviewee 23 (March 2025).

<sup>83</sup> Interviewee 11 (January 2025).



7.

## Conflicts in the Shared Neighbourhood: Ukraine, Palestine, and Syria

Spain recognizes the key role that Turkey has played in Ukraine, even before the onset of Russia's war of aggression. Ukraine is an important topic in bilateral discussions, which are described as cordial and constructive.<sup>84</sup> Seen from Spain, Turkey is not only a crucial military supplier – best exemplified by its provision of drones – but also a politically significant actor with both the willingness and the capacity to mediate between the parties and reach agreements that are positive for everyone.<sup>85</sup> Although Turkey's position, particularly concerning Russia, is not identical to that of Spain's as an EU member, this does not imply antagonism. Rather, the positions are complementary, as several interviewees insisted, referring mainly to Turkey's contributions towards mediation, soldiers exchange, and defence supplies to the Ukrainian army.<sup>86</sup> If Ukraine – the victim of the aggression – appreciates Turkey's role, it would be unfair for us to criticize it, one interviewee added.<sup>87</sup>

Spain acknowledges Turkey's influence in Kyiv. Any actor with stakes in the war in Ukraine, including Spain, must pay attention to Turkey and engage with it, according to a senior Spanish diplomat, who revealed that, through bilateral contacts, he could also confirm that Turkey also values Spain's perspectives on the issue, and that there is an interest by Turkish counterparts to understand Spain's stakes and positions on this matter, despite the fact that Spain is not among the most influential players in this conflict.<sup>88</sup>

According to the diplomats interviewed, Spain also commends Turkey's role in negotiating the grain export deal that facilitated shipments via the Black Sea. As a significant client of Ukraine's farming sector before the war, Spain has benefited from this arrangement. However, informants stressed that the primary security-related

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<sup>84</sup> Interviewee 14 (January 2025).

<sup>85</sup> Interviewee 8 (January 2025).

<sup>86</sup> Interviewees 8 and 14 (January 2025).

<sup>87</sup> Interviewee 14 (January 2025).

<sup>88</sup> Interviewee 14 (January 2025).

significance of the deal lies in its contribution towards reducing the risk of new conflicts and tensions in low-income, food-dependent countries in Africa and the Middle East – an issue of strategic concern for the EU.<sup>89</sup>

A notable development in bilateral relations has been the impact of the 7 October attacks and the subsequent escalation of tensions in the Middle East. The Spanish and Turkish governments have different approaches to Hamas, as Madrid maintains a policy of no-contact, whereas Ankara has engaged with Hamas' political leadership. Despite these differences, Spain's decision to recognize the State of Palestine in May 2024 and its consistent advocacy for a ceasefire at the UN – unlike other major EU member states such as Germany – have been positively received in Ankara. Spain's insistence that solidarity with Israel must be conditioned upon the respect for international humanitarian law has further reinforced the appreciation of Turkish authorities.<sup>90</sup> The criticism directed at Spanish officials by senior Israeli figures included accusations that the actions of Spain's prime minister were a form of support for terrorism,<sup>91</sup> and that the recognition of Palestine was a "gift to Hamas",<sup>92</sup> as well as more alarming rhetoric, such as when Israel's then Minister for Foreign Affairs warned that "those who harm us, we will harm in return".<sup>93</sup> Arguably, this has generated a sense of empathy towards Spain in Ankara. Proof of that is the fact that President Erdoğan said during the joint press conference with Sánchez during the 2024 governmental summit that "Mr Sanchez has pursued a principled and consistent policy from day one [of the war] and has a special place in the hearts of the entire Turkish nation".<sup>94</sup>

In addition, the war in Gaza has also created new forums for dialogue in which Spain and Turkey occasionally meet. A prime example is the coordination mechanism established between European states that have recognized the Palestinian state and the Arab-Islamic contact group for Gaza. This initiative led to a ministerial meeting in Madrid in September 2024, attended by Turkish Foreign Minister Hakan Fidan. Similarly, the fall of the Assad regime in Syria appears to have opened new avenues for dialogue and cooperation between Spain and Turkey. Spain has assessed Turkey's role in Syria more favourably than some other EU countries, particularly those such as

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<sup>89</sup> Interviewee 5 (January 2025).

<sup>90</sup> Interviewee 12 (January 2025).

<sup>91</sup> Giovanna Faggionato, "Israel Accuses Spain, Belgium Leaders of Backing 'Terrorism' after Gaza Remarks", *Politico* (online), 25 November 2023, <https://www.politico.eu/article/israel-gaza-belgium-spain-supporting-terrorism-terror-war-sanchez-de-croo/> (accessed 21 February 2025).

<sup>92</sup> "'Scandalous': Spanish FM Hits Back at Israeli Counterpart Katz over 'Hamas Thanks Spain' Video", *Haaretz* (online), 26 May 2024, <https://www.haaretz.com/israel-news/2024-05-26/ty-article/outrageous-spanish-fm-lashes-out-at-israeli-counterpart-katz-over-gracias-hamas-video/0000018f-b5b7-d33c-a5bf-ffb75e560000> (accessed 21 February 2025).

<sup>93</sup> Raf Casert, "Relations Between EU and Israel Plummet as Spain, Ireland Prepare to Recognize a Palestinian State", *Associate Press* (online), 27 May 2024, <https://apnews.com/article/eu-palestinian-recognition-israel-gaza-c92c908ee11f8e4d37756aa44fa588ae> (accessed 21 February 2025).

<sup>94</sup> "Turkey's Erdogan Thanks Spain for Gaza Stance", *The New Arab* (online), 13 June 2024, <https://www.newarab.com/news/turkeys-erdogan-thanks-spain-gaza-stance> (accessed 21 February 2025).

France that have closer ties to Kurdish-Syrian groups within the Syrian Democratic Forces. From Turkey's perspective, Spain is seen as a relatively amicable partner on Syrian matters, in part due to its past deployment of Patriot missile batteries in Adana to help protect Turkey from security threats emanating from Syria. Following Assad's fall in December 2024, Spain swiftly expressed its commitment to regional stabilization and Syria's reconstruction. Spain also demonstrated its willingness to engage with the new authorities in Damascus. This was exemplified by the visit of Spanish Foreign Minister José Manuel Albares to Damascus in January 2025. Moreover, Albares held a phone conversation with his Turkish counterpart, Hakan Fidan, shortly before his visit to Syria.<sup>95</sup> Similar to the enhanced dialogue between Madrid and Ankara in the aftermath of the war in Gaza, the fall of Assad seems to have triggered similar dynamics. Spain has been invited by its Saudi hosts to participate in informal forums on Syria such as the Riyadh Meetings – an initiative attended by Arab and Middle Eastern countries (including Turkey), a few EU member states, the United States, and representatives from the UN and regional organizations. According to its Saudi chair, the forum aims to “rebuild Syria as a unified, independent, and secure Arab state for all its citizens”.<sup>96</sup>

In summary, whether in the war in Ukraine, in Gaza, or the fall of Assad in Syria, Spain appears to understand and respect Turkey's perspectives and is willing to exchange and engage as much as possible with its Turkish counterparts in fostering security, de-escalation, and reconstruction in their shared neighbourhood. Although these developments have not yet resulted in specific forms of bilateral cooperation, they have fed a substantive political dialogue, and the participation of Turkey and Spain in informal fora is likely to reinforce this trend.

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<sup>95</sup> Interviewee 13 (January 2025).

<sup>96</sup> “Riyadh Meetings Presidency Issues Statement on Syria”, Saudi Press Agency (SPA), 12 January 2025, <https://www.spa.gov.sa/en/N2241515> (accessed 21 February 2025).

8.

# Unlocking the Strategic Potential: Spain–Turkey Bilateral Industrial Partnership

Military and defence industry relations between Spain and Turkey play a crucial role in strengthening their bilateral ties, currently serving as one of the main vectors of cooperation between both countries. In fact, collaboration in the defence sector represents the most significant contribution and the most critical aspect of their relationship. From the Spanish perspective, these projects not only reinforce bilateral ties with Turkey, but also consolidate cooperation in the military and defence sector, with broader implications for security and defence in a period of technological revolution. All interviewees acknowledge Turkey's industrial strength, highlighting its transformation from an arms-importing country to a rising export power with a dynamic and rapidly expanding military industry.

Thus, the discussion about the Turkish defence industry is emerging at a pivotal moment in Spain's ongoing industrial debate. This discussion revolves around how to navigate the systemic shifts occurring within the European defence sector, including industrial restructurings through mergers, additional financing from the EU, and technological advancements that position the industry at the forefront of a fourth industrial revolution.<sup>97</sup> These transformations directly impact Spain's strategic choices, as its defence sector must adapt to the evolving European landscape. Consequently, Spain is balancing two strategic approaches: the creation of a “national champion” – with the technology company Indra at the forefront, as previously mentioned – and the promotion of specialized tier 2 and tier 3 companies that can become essential partners for third parties.<sup>98</sup>

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<sup>97</sup> Christian Villanueva, Guillem Colom, Guillem Colom, “¿Estamos ante una revolución militar?” [Are We Facing a Military Revolution?], *Global Strategy* (online), Estrategia podcast 101, 15 April 2024, <https://global-strategy.org/revolucion-militar/> (accessed 27 March 2025).

<sup>98</sup> Christian Villanueva, Javier Jordán, “Futuro de la industria de defensa en España ante las transformaciones en Europa y Estados Unidos” [The Future of the Defence Industry in Spain amid Transformations in Europe and the United States], *Global Strategy* (online), Estrategia podcast 128, 02

This second strategy involves forming alliances with international companies, and this is where the full potential of the Turkish defence industry emerges as a possible strategic partner. In essence, Turkey is not judged as a “competitor”,<sup>99</sup> but as a potential partner. It is noted that only ammunition manufacturers are usually competitors of Spanish companies; nevertheless, there are commercial opportunities in components or specialized munitions.<sup>100</sup> A caveat in this industrial relationship is that with each service provided, a portion of know-how is transferred, ultimately paving the way for Turkey’s technological independence.<sup>101</sup> Linked to this idea and the general Spanish posture, some criticism is emerging regarding the lack of an explicit strategy on this matter and Spain’s approach to working with Turkey.<sup>102</sup>

A representative case illustrating this trend is Navantia, the Spanish state-owned company, fully owned by the state through SEPI (Sociedad Estatal de Participaciones Industriales), which co-built the amphibious assault ship *TCG Anadolu* for the Turkish Navy alongside the Turkish shipyard Sedef. This vessel is modelled on the Spanish LHD *Juan Carlos I*. Spain’s assessment of this relationship differs significantly from that of other European capitals. Spain finds itself in a position in which it requires external partners to both expand its defence exports and counterbalance the influence of more dominant European companies and member states such as Germany, France, and Italy. In this context, Turkey – alongside other potential partners such as Australia,<sup>103</sup> Japan,<sup>104</sup> Saudi Arabia,<sup>105</sup> and the United Kingdom<sup>106</sup> – emerges as an ideal ally for Spain, offering opportunities to negotiate agreements in the naval and aerospace sectors, secure industrial offsets, and gain access to technologies that would enable the Spanish defence industry, particularly its state-owned enterprises, to compete with major consortia such as Naviris.<sup>107</sup> On the other hand, Navantia has

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February 2025, <https://global-strategy.org/futuro-industria-defensa-espana/> (accessed 27 March 2025).

<sup>99</sup> Sıtkı Egeli, Serhat Güvenç, Çağlar Kurç, Arda Mevlütoğlu, *From Client to Competitor: The Rise of Türkiye’s Defence Industry* (London: International Institute for Strategic Studies [IISS], 01 May 2024), <https://www.iiss.org/research-paper/2024/05/from-client-to-competitor-the-rise-of-turkiyes-defence-industry/> (accessed 30 March 2025).

<sup>100</sup> Interviewee 1 (January 2025).

<sup>101</sup> Interviewee 17 (January 2025).

<sup>102</sup> Interviewee 15 (January 2025).

<sup>103</sup> Spain, through the company Navantia, has constructed several warships for the Australian Navy, including the Hobart-class destroyers, supply ships (HMAS *Supply* and HMAS *Stalwart*), and amphibious assault ships (HMAS *Adelaide* and HMAS *Canberra*).

<sup>104</sup> Christian D. Villanueva López, “España, Indra, Navantia y el Kawasaki P-1” [Spain, Indra, Navantia and the Kawasaki P-1], *Revista Ejército* (online), 21 October 2024, <https://www.revistaejercitos.com/articulos/espana-indra-navantia-y-el-kawasaki-p-1/> (accessed 24 February 2025).

<sup>105</sup> Similarly, Navantia has constructed five Avante 2200 corvettes for Saudi Arabia, with an additional three planned under a new agreement.

<sup>106</sup> “Navantia UK negocia la compra de Harland & Wolff y asegura el cumplimiento del programa FSS” [Navantia UK Negotiates the Purchase of Harland & Wolff and Ensures Compliance with the FSS Programme], *Navantia* (online), 19 December 2024, <https://www.navantia.es/es/actualidad/notas-prensa/navantia-uk-negocia-la-compra-de-harland-wolff-y-asegura-el-cumplimiento-del-programa-fss/> (accessed 24 February 2025).

<sup>107</sup> Interviewee 2 (January 2025).

also expressed interest in participating in Turkey's frigate and submarine programmes, which could further strengthen bilateral cooperation in the field of naval warfare construction. However, in this case, the perceived opportunities appear to be more limited.<sup>108</sup>

These naval developments also have potential operational and tactical implications for Spain. The *TCG Anadolu* has become a reference point for other projects, as the drone trials conducted on this vessel are seen as a possible model to be replicated on the Spanish Navy's "sister ship".<sup>109</sup> This development is crucial, given Spain's internal debate on the sustainability of its fixed-wing fleet, currently operated by the AV-8B Harrier II, and the need to modernize its naval forces in response to advancements in platforms such as drones. In fact, Airbus and the Spanish Navy have signed an agreement in this regard, taking the Turkish case as a reference.<sup>110</sup>

More broadly, the success of Turkey's drone industry, particularly in the development of models such as the Bayraktar, is regarded by the Spanish defence community as a notable example of benchmarking within the global defence industry, positioning Turkey as a leader in an expanding market niche. The acquisition of Turkish drones by other European countries such as Poland, but also by Spain's southern neighbours, Morocco and Algeria, has sparked an unofficial, ongoing discussion within expert circles regarding the potential procurement of Turkish-manufactured drones. In general terms, Spanish defence industry exports to Turkey are primarily concentrated in the aerospace subsector (64.99 per cent) and the technology sector (20.16 per cent); meanwhile, imports from Turkey are predominantly in the aerospace subsector (99.41 per cent). Indeed, the other major sector of military-industrial cooperation is the aerospace industry. At the time of writing, several large-scale projects are under consideration. One of the most significant milestones is the signing of a memorandum of understanding for the development of an advanced training system for the Spanish Air and Space Force, which opens the possibility for Spain to acquire the Turkish Hürjet advanced trainer aircraft as a replacement for its ageing F-5 fleet. Semi-public companies such as Indra, along with several small and midsize enterprises in the defence industry, are also highly interested in the potential acquisition of Turkish training and combat aircraft by Spain.<sup>111</sup> This would not only open opportunities for industrial offsets, but it would also represent direct competition for Airbus in the aerospace sector.

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<sup>108</sup> Interviewee 19 (March 2025).

<sup>109</sup> Joseph Trevithick, "TB3 Operates from Turkey's 'Drone Carrier' Amphibious Assault Ship for the First Time", *The War Zone* (online), 19 November 2024, <https://www.twz.com/air/tb3-drone-lands-takes-off-from-turkeys-drone-carrier-amphibious-assault-ship> (accessed 30 March 2025).

<sup>110</sup> Benjamin Carrasco, "La Armada sigue la estela turca ante la jubilación de los Harrier y apuesta por los drones para su LHD" [The Spanish Navy Follows Turkey's Lead with the Retirement of the Harriers and Bets on Drones for Its LHD], *Infodefensa* (online), 29 January 2025, <https://www.infodefensa.com/texto-diario/mostrar/5159986/armada-sigue-estela-turca-ante-jubilacion-harrier-apuesta-drones-lhd> (accessed 30 March 2025).

<sup>111</sup> Interviewee 6 (January 2025).



Moreover, the potential acquisition of Eurofighter jets (EF2000) by Turkey represents another key vector in the bilateral relationship: The production of the European Eurofighter, partly assembled at Airbus facilities in Spain, would have a significant impact on the Spanish aerospace industry, both in terms of industrial weight, employment, and technological contribution,<sup>112</sup> further strengthening the strategic importance of this relationship. In fact, Spain has supported Turkey's acquisition of the EF2000 from the outset and, alongside other consortium partners, has played a role in influencing Germany to ultimately grant its approval.<sup>113</sup> Another asset is the need to modernize the large fleet of CN-235 aircraft, which is assembled in Spain. Finally, the possibility of acquiring new units of the A400M – the Airbus military transport aircraft, of which Turkey is already an operator with 10 aircrafts and which is manufactured in Spain (again domestic economic considerations) – would add new milestones to the relationship while also helping the SAF to manage its surplus of orders that is unable to integrate.

The strength of these relations could pave the way for new areas of cooperation, particularly in the military land domain. A notable example is the recent agreement between the Spanish company Indra and the Turkish firm Otokar to explore collaboration in land systems, specifically in military armoured vehicles.<sup>114</sup> This industrial movement is significant, as it seeks to strengthen Indra's position as the so-called “national champion” in the land sector as well. Notably, the new president of Indra was formerly the president of Escribano Mechanical & Engineering (EM&E) – a position that has been endorsed by the Spanish government. EM&E is one of the key companies involved in developing the 8x8 Dragón infantry fighting vehicle – the flagship programme of the Spanish Army – which has been plagued by severe delays. Consequently, the prospect of acquiring Turkish-manufactured vehicles, such as the 6x6 and 8x8 ARMA wheeled armoured combat vehicles, could potentially be considered in the future. But beyond the circumstances of specific programmes, the path of cooperation followed by both countries could facilitate the entry of these new companies.<sup>115</sup>

One last dimension to consider is the ongoing revolution in the European defence industry and market. Since Turkey's participation in European industrial cooperation mechanisms is ruled out, at least directly, the bilateral relationship is critical for Spain. Although the European Commission has opened the door to the participation of third states, the requirements to provide significant added value to the project and

<sup>112</sup> Alberto Bueno, 2024: 46–59.

<sup>113</sup> Interviewee 1 (January 2025).

<sup>114</sup> Benjamin Carrasco, “Indra cierra una alianza con el fabricante turco de vehículos militares Otokar y tantea a la industria surcoreana” [Indra Forms an Alliance with Turkish Military Vehicle Manufacturer Otokar and Explores South Korean Industry], *Infodefensa* (online), 21 February 2025, <https://www.infodefensa.com/texto-diario/mostrar/5190616/indra-cierra-alianza-fabricante-turco-vehiculos-militares-otokar-tantea-industria-surcoreana> (accessed 30 March 2025 ).

<sup>115</sup> Interviewee 19 (March 2025).

have agreements on the exchange of classified information with the EU make Turkish integration into these industrial cooperation frameworks very difficult.<sup>116</sup> Additionally, according to Spanish experts, Turkey's ambiguous position would prevent its participation in such projects.<sup>117</sup> Nonetheless, current mechanisms such as the EDF do not preclude the possibility of Turkish defence industry involvement, as it could engage indirectly through partnerships with companies that access EDF funds.<sup>118</sup> In that sense, two high-level officials interviewed suggested that this situation has changed the terms of the conversation and opened a rare window of opportunity for Turkey-EU cooperation on security matters that may close soon.<sup>119</sup>

All in all, the bilateral industrial and defence cooperation between Spain and Turkey plays a crucial role in strengthening their relationship, particularly in the military sector. It is believed that industrial and defence cooperation between countries could strengthen bilateral ties while opening new opportunities for Spain's defence industry. This collaboration not only supports the development of large-scale platforms, but it could also facilitate the internationalization of Spanish companies, enhancing both their technological capabilities and global competitiveness, which are core dimensions of the Spanish military industry strategy.

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<sup>116</sup> Interviewee 21 (March 2025).

<sup>117</sup> Interviewees 6 and 11 (January 2025).

<sup>118</sup> Interviewee 11 (January 2025).

<sup>119</sup> Interviewees 22 and 23 (March 2025).



# Conclusion

Spain-Turkey relations are stable, pragmatic, and truly amicable: The bilateral partnership has remained strong, largely free from the many tensions that have affected Turkey's relations with other Western allies. Geographical distance facilitates rather than hinders cooperation. Unlike other European countries, Spain does not perceive Turkey as a contentious partner, which has allowed for consistent cooperation at various governmental levels. This dynamic permits bureaucrats and technocrats from both countries to expand their bilateral cooperation with minimal concern about how their actions may be perceived by their respective publics, or whether they might be instrumentalized in the political discussion.

Defence cooperation has become a key pillar of this relationship, bilaterally as well as in multilateral settings. On the latter, Spain's contributions to Turkey's security through NATO, such as the deployment of the Patriot battery, have reinforced trust and strategic collaboration. Spain and Turkey share common security concerns, particularly in the Mediterranean and the Middle East. For both nations, this is a region of primary importance and strategic interest. Spain views Turkey as a critical player, helping to maintain the attention of its allies southward. Overall, Spain sees Turkey as an essential but complex NATO ally. While acknowledging Turkey's strategic significance, some in Spain share concerns with other Western allies about Turkey's growing assertiveness in its foreign policy and are aware of how this could irritate intra-NATO cooperation or extremely sensitive EU-NATO cooperation. Advancing cooperation within the EU has proven far more difficult. The Spanish government, regardless of electoral changes, has remained favourable to Turkey's EU accession but lacks the leverage to shift EU-wide policies, particularly due to opposition from other member states and the unwillingness to antagonize them. Therefore, Spain's policy is focused on avoiding a train wreck, identifying areas where constructive cooperation is still possible, and looking beyond the EU to substantiate its partnership with Turkey.

Bilaterally, this report has traced the mounting interest in upgrading relations and collaboration in security and defence. Faced with the question of whether Turkey is a potential competitor for Spain or, alternatively, a valuable partner for joint projects in the domain of security and defence, the conclusion of this paper leans towards the latter. The industry also tends to view Turkey as a significant asset in a critical economic and international context. However, the question remains as to how this aligns with a broader and more coherent Spanish defence and industrial strategy.

On top of all these elements, relations between Madrid and Ankara will have to adapt to a changing and arguably more hostile global environment. The main challenge is the fact that European countries are facing a hostile and emboldened Russia, while many of them perceive that they may not be able to rely as they used to on US security guarantees. The depiction of the EU as a trade rival by the US president, the willingness to compromise with Putin, the deliberate attempt to sideline European allies from any deal on Ukraine, his aggressive remarks regarding Denmark, and the shockwaves provoked by JD Vance's speech in the Munich Security Conference have created a new scenario in which Turkey and its European allies will have to re-imagine their level and quality of cooperation in the field of security and defence.

Spain has been present in most high-level discussions on this topic, whereas Turkey has been selectively included, with deliberate exclusions from certain meetings. Thus, while Spain and Turkey are about to take decisions on how to substantiate their willingness to upgrade their bilateral cooperation in the field of security and defence, another major decision will be taken, and by actors that have more leverage than Madrid: Will Turkey be invited to take part in the building of a new European security architecture, together with the EU and other likeminded non-EU states such as the United Kingdom and Norway? Based on our findings, Spain would feel comfortable if the response was a positive one, but it will not have the capacities to steer the decision towards these directions if other, more powerful states were to oppose.

In this circumstance, Spain's role is that of a country which can try to bring positions closer, facilitate dialogue, and create positive conditions for rapprochement. As one of the interviewees put it, the peculiarity of Turkey-Spain relations is that it is based on trust, and this is rare when compared to the relations that Turkey has with other allies. Moreover, mutual solidarity in emergency situations such as the pandemic or the 2023 earthquake has also further solidified this trust, proving the importance of emotions serving as one of the drivers in building security partnerships. Therefore, Spain could be a relevant player when imagining and implementing confidence-building measures to rebuild this trust at a broader level. There is little more that Spain can do when it comes to the EU, other than advocating that a rupture be avoided and teaming up with other likeminded actors in generating ideas on how to promote a more constructive relationship – and one that can be resilient during crises.

Spain can also team up with Turkey and other Southern European countries to recall that the Southern Flank is also critical for Europe's security. It can team up with Ankara and many other capitals in Europe as well in order to suggest the need to strengthen cooperation in other forums such as the UN and the Organization for Security and Co-operation in Europe. Even if these approaches were not to work, one should assume that Spain will continue to collaborate with Turkey on a bilateral basis. The main reason is not to be found in discussions on the European insecurities, but on the willingness to strengthen, consolidate, and internationalize Spain's defence industry through partnerships that go beyond the large industrial conglomerates

within the EU. From a Spanish perspective, Turkey is an ideal partner for these purposes, whereas from a Turkish point of view, Spain could be a reliable ally with no ulterior motives. To avoid potential backlashes, Spain will have to ensure that this cooperation with Turkey is not perceived by other European partners as a zero-sum game or a source of suspicion, but rather as a legitimate interest in diversifying options that, in the long term, can contribute to European security.

Stronger bilateral relations between individual member states and Turkey will buffer EU-Turkey tensions. So, developing these relations is both a way of adapting to the paralysis of the accession track and preserving the links that tie Turkey and the EU together. The EU should learn from Spain that it is not only about material costs and benefits. Even though transactionalism seems to be the new rule of the game, Spain-Turkey relations show that less tangible elements such as trust, sympathy, solidarity, and respect are of major importance.

# Abbreviations

EADRCC	<i>Euro-Atlantic Disaster Response Coordination Centre</i>
EDF	<i>European Defence Fund</i>
EM&E	<i>Escribano Mechanical &amp; Engineering</i>
ETA	<i>Basque Country and Freedom</i>
EUMAM	<i>European Military Assistance Mission</i>
GDP	<i>Gross Domestic Product</i>
ISIS	<i>Islamic State of Iraq and Syria</i>
MENA	<i>Middle East and North Africa</i>
NASAMS	<i>Norwegian Advanced Surface-to-Air Missile System</i>
PESCO	<i>Permanent Structured Cooperation</i>
PP	<i>Spanish People's Party</i>
PSOE	<i>Spanish Socialist Workers' Party</i>
SAF	<i>Spanish Armed Forces</i>
UNIFIL	<i>UN Interim Force in Lebanon</i>

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