

The Procurement Journey of the Next Fighter Jet: Ankara's Dilemmas

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Turkey's need to renew its fleet of fighter jets is not new, but it has become more pressing due to acquisitions by other regional states and the outcomes of Israel's war with Iran. Although Ankara is still dealing with the repercussions of its removal from the F-35 program in 2019, it now has more options than in the past, thanks to its improved political situation as a result of the war in Ukraine, the fall of the Assad regime in Syria, and Trump's return to the White House. Currently, Ankara is considering three main options for renewing its aircraft—American, European, and domestic—but none is ideal. Uncertainty clouds procurement from the United States and Europe, while the domestic option is a gamble on the success of the fighter jet that Turkey is developing itself. Nevertheless, whichever option Turkey chooses will significantly enhance its aerial capabilities, and regional states, including Israel, should prepare accordingly.

Modernizing the Turkish Air Force has preoccupied Ankara for many years. Its current fleet consists mainly of American-made F-16s, acquired in the 1990s and later upgraded with both American and Turkish systems, and older F-4 aircraft purchased from the United States in the 1970s, which were later upgraded with Israeli technology, in cooperation with Israel Aerospace Industries in 1997. These operational fighter jets entered service decades ago, and despite the upgrades, the aging of these aircraft has become a pressing problem that now requires attention.

Fighter jets are typically classified by generations. In this context, the F-4 is considered a prominent third-generation model, while the F-16 belongs to the fourth generation. Since then, however, technologies have enabled significant improvements in critical areas such as maneuverability, radar, stealth, integration with command-and-control systems, and advanced information systems. On this basis, fifth-generation jets, most notably the F-35, entered service in the 2000s.

Ankara intended to advance its air force to the fifth generation by participating in the F-35 program and even produced components for the aircraft. However, in 2019, the United States expelled Turkey from the program in response to Ankara's procurement of the Russian S-400 air defense system. At that time, Washington feared that Turkey's simultaneous operation of the American aircraft and the Russian system would enable sensitive information about the F-35 to be collected and transferred to Russia.

The fact that the Turkish Air Force was left with an outdated generation of fighter jets became even more problematic for Ankara due to the regional aerial arms race. Israel already operates the F-35. Several other countries have acquired fighter jets more advanced than the F-4 and

F-16, incorporating technologies that partially approach the most advanced jets (often referred to as the “4.5 generation”). Egypt, Qatar, and the United Arab Emirates purchased the French Rafale fighter jet, while the Gulf states, led by Saudi Arabia, procured the Eurofighter Typhoon, jointly developed by Britain, Spain, Germany, and Italy. Greece, Turkey’s historic rival to the west, purchased Rafale jets and engaged in advanced talks to acquire the F-35. This means that Greece—with which Turkey has had frequent friction over the years, including in the air—will soon be able to operate fifth-generation stealth aircraft, granting it greater freedom of action in Turkish skies. This represents a significant threat to Ankara.

Since its removal from the F-35 program, Turkey has faced a dual challenge with significant strategic implications: the aging of its air fleet and a widening gap relative to its neighbors. While Ankara has pursued a more assertive foreign policy and has increased its military strength, achieving successes on land and at sea, its weakness in the air undermines the relative advantage it has in other areas. Attempts to compensate with advanced UAVs have, over time, proven to be only a partial solution.

Ankara’s awareness of the need to accelerate the modernization of its air force became clearer after Israel’s war with Iran. In early August, the Turkish National Intelligence Academy published a report outlining lessons for Turkey from the conflict between Israel and Iran. The first lesson was the need to continue modernizing Turkey’s aerial platforms. Israel’s air superiority and its role in achieving a decisive victory against Iran—combined with Ankara’s perception that it is competing with Israel for regional influence—underscored the critical importance of Turkey’s air fleet, especially given the Israeli Air Force’s advanced capabilities due to the F-35.

To address this issue, the Turkish government has several options. Although Turkish officials have occasionally raised the idea of purchasing Russian or Chinese fighter jets, this now seems unlikely, given the opposition such a move would trigger within NATO, as well as the lengthy adaptation time required to adjust to systems completely different from those Turkey currently operates. Instead, three options for procuring fighter jets have emerged in recent years with a higher likelihood of materializing: from the United States, Europe, or through Turkey’s own defense industry.

During the Biden administration, Turkish President Recep Tayyip Erdoğan negotiated with Washington to upgrade Turkey’s F-16 fleet through the purchase of more advanced aircraft of the same model and upgrade packages for those already in service. In early 2024, in exchange for Ankara’s consent to Sweden’s accession to NATO, President Biden approved the deal. However, by the end of that year, Turkey abandoned the deal for upgrade packages, claiming it had domestic solutions. That same year, American officials also hinted at the possibility of Turkey rejoining the F-35 project. The return of Donald Trump to the US presidency—widely viewed as more sympathetic to Erdoğan than Biden—created new momentum, with Trump expressing a willingness to advance the issue. Given the new reality in Washington, Turkey decided to focus its efforts with the US administration on regaining access to the F-35 program.

Concurrently, in 2023, given delays in the negotiations with Washington, Ankara also turned to the Eurofighter consortium. Any Eurofighter purchase requires the approval of the countries in the consortium. For months, Germany's opposition—due to Turkey's operations in northern Syria and its domestic human rights record—was the main obstacle to progress in negotiations. On July 23, 2025, Germany's security export committee lifted its veto, while a preliminary agreement was signed between the British and Turkish foreign ministers for the purchase of Eurofighters. Spain and Italy, also partners in the project, are not expected to oppose continued negotiations between the parties, making the European option appear the most likely in recent weeks.

Ankara's third option rests on its own national defense industry, which has rapidly developed in recent years. Turkey has already begun upgrading parts of its F-16 fleet with domestically produced systems. Its flagship project, however, is the Kaan, Turkey's national fighter jet. A prototype of the jet made its maiden flight in 2024, and according to Turkish officials, the aircraft will possess the capabilities of the most advanced generation of fighter jets, largely based on Turkish technologies.

Beyond its military role, the Kaan project, which began in 2016 before Turkey was removed from the F-35 program, has become a central symbol in the regime's propaganda and has been used to mobilize nationalist voters for domestic purposes. The aircraft is also intended to become a major export product for Turkey's defense industry. In July 2025, Indonesia became the first foreign customer to purchase the Kaan, signing a contract for 48 aircraft to be delivered within ten years. Other countries, including Pakistan, Saudi Arabia, the United Arab Emirates, and Egypt, have also expressed interest.

Seemingly, Ankara now has more options than it did several years ago when Western countries were unwilling to sell advanced weaponry to the Turkish military. This shift reflects Turkey's improved political standing, due in part to its growing importance in the context of the war in Ukraine and the fall of the Bashar al-Assad regime in Syria. However, it also places the Turkish leadership in a position to consider alternatives, each carrying distinct advantages and risks.

Upgrading the F-16s already in Turkey's possession represents a relatively inexpensive and short-term option. However, even if implemented, it would only narrow—rather than close—the gap between the Turkish Air Force and other militaries, especially if carried out primarily with Turkish technologies. Turning to Washington, whether for upgrading the existing aircraft or acquiring new F-16s, would keep Turkey dependent on the United States. The sale was approved, but securing Congress's consent for the F-16 deal faced obstacles from Greek, Armenian, Kurdish, and pro-Israeli lobbies. Turkey's hesitation to complete the purchase also stems partly from its desire to rejoin the F-35 program.

Turkey's return to the F-35 program might lead to even greater opposition in Congress, given the far more serious implications of such a move for Ankara's military capability and for the regional balance of power. Tensions between Israel and Turkey over Syria have intensified, and while not officially stated, Israel's opposition to the sale of F-35s to Turkey has become more prominent in closed discussions, largely due to fears of a potential direct confrontation.

In addition, the United States and Turkey have yet to find an acceptable formula for resolving the issue of Turkey's purchase of the S-400 system from Russia—a sticking point with NATO.

It appears that Eurofighter manufacturers are now more willing to sell their aircraft to the Turkish Air Force, even if negotiations on the details are still expected. The Eurofighter, however, is not a fifth-generation fighter and is considered inferior to the Rafale, although it excels in air defense missions and could help Turkey match some of its neighbors in dogfights. Greece's Prime Minister Kyriakos Mitsotakis commented on the potential purchase, saying that "Turkey is a large country with a strong defense industry. And if someone believes they can block any purchase of defense equipment by Turkey, they are quite ignorant. It has never happened. It cannot happen. What can happen, however, is that we make our European allies aware that there will be contingencies and conditions regarding the way these aircraft will be delivered, potentially used and supported in the future." In this sense, Mitsotakis hinted at earlier reports of a German demand that Turkey not employ Eurofighter jets against another NATO ally and particularly not to penetrate Greek airspace.

The option of the Turkish national jet, by contrast, seemingly frees Ankara from dependence on lengthy negotiations with foreign governments, which often demand compromises on sensitive issues. For this reason, nationalist voices in Turkey emphasize the need to avoid purchasing foreign fighter jets, warning that such acquisitions would divert resources from the Kaan national project and delay both that project and Turkey's "liberation" from reliance on foreign nations.

However, this decision carries many risks. Foreign commentators continue to question the true capabilities of the Kaan, which still relies on foreign technologies in critical aspects, including engines. Moreover, unlike the other alternatives, the Kaan has not yet been adopted by any military, meaning Turkey would forgo the benefits of operational experience already accumulated by other operators. In other words, betting on the success of the national aircraft merely replaces the uncertainty of negotiations with foreign partners with uncertainty about the capabilities of Turkey's own defense industry.

Time is another decisive factor, pushing Ankara to weigh a combination of options. Even if the Kaan project stays on schedule, serial production and operational deployment by the Turkish Air Force are expected only in the next decade. The national program therefore cannot meet Ankara's current sense of urgency. In this context, the Eurofighter is viewed as an interim solution that, if procured quickly, could help narrow the gap with other regional air forces. Still, this combined option is inferior to acquiring F-35s, which alone could resolve both the immediate and longer-term challenges.

Ankara thus faces imperfect alternatives, with its decision shaped by many considerations: the operational capabilities of the aircraft, its cost, prospects of successful procurement or production, delivery time, foreign relations with other countries, and even its image in the domestic political arena. Turkey is pursuing all three tracks in parallel, which also influence one another. Alongside the possibility of combining Eurofighter procurement with Kaan development, experts have pointed to the potential for Turkey to acquire the F-35 as a way to acclimate its air force to the fifth generation while the Turkish jet is being developed—

making the matter less urgent. However, this solution appears to be the most expensive. Others interpret Ankara's negotiations with the Europeans as leverage to pressure Washington into concluding an F-35 deal more quickly.

For the states concerned about Turkey's rising power, each option carries implications with mixed consequences. Compared to Turkey acquiring F-35s, the option of procuring Eurofighters is generally seen as preferable, given the aircraft's more limited capabilities. However, the likelihood of a full F-35 deal being realized is the lowest among all the options, as it would significantly erode Israel's relative advantage and, ultimately, that of Greece. As Prime Minister Mitsotakis emphasized, aircraft procurement is not a one-time transaction but an ongoing process that can shape a country's behavior.

Ankara's gamble on Turkey's technological ability and the choice between independent achievements and dependence on foreign suppliers also has implications beyond Turkey. The sale of European or American aircraft could lead to technology transfers that the Turkish defense industry or other suppliers are unable to supply to Turkey. Conversely, it can be argued that Turkish procurement from Western sources is still preferable to the alternatives, as it leaves the United States and Europe with leverage should Turkey adopt an aggressive policy toward its neighbors. In any case, the regional states, including Israel, should prepare for the prospect of an upgraded Turkish Air Force in the near future.

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