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Israel and Türkiye: on a collision course? Strategic rivalry, interests and scenarios for confrontation in the new Middle East

Israel and Türkiye: on a collision course? Strategic rivalry, interests and scenarios for confrontation in the new Middle East

Abstract:

Relations between Israel and Türkiye are undergoing a significant transformation, from the strategic cooperation of the 90s to the current geopolitical rivalry. Although both countries share common interests and indirect ties that make open confrontation inadvisable, their strategic agendas are increasingly divergent. Ankara's regional policy, its growing influence in Syria, its support for the Palestinian cause and its aspirations for leadership in the Middle East clash with Israeli security priorities and Jerusalem's desire to preserve its military superiority and freedom of action. Syria is the main arena of friction, alongside Gaza, the eastern Mediterranean, the Horn of Africa and the competition for regional influence. The conclusion is that a direct war is not inevitable but there is a growing risk of accidental escalation or indirect clashes that could upset the strategic balance in the Middle East

Keywords:

Israel, Türkiye, Syria, Gaza, the eastern Mediterranean, the Horn of Africa, regional security, strategic rivalry

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Introduction. Two regional powers facing a new balance of power

Relations between Israel and Türkiye are going through one of the most delicate periods in their contemporary history. What in the 90s came to constitute a strategic partnership based on military cooperation, the exchange of intelligence and a convergence of regional interests has gradually transformed into a relationship marked by mistrust, geopolitical competition, and a growing divergence of objectives. The Gaza war, the shifting balance of power in Syria and the struggle for influence in the eastern Mediterranean and the Horn of Africa have contributed to placing the two countries in increasingly opposing positions.

This is not merely a diplomatic breakdown caused by personal differences between Recep Tayyip Erdoğan and Israeli leaders. Behind the political confrontation lies a deeper divergence over the future of the regional order. Israel seeks to preserve its military superiority, guarantee its freedom of action and prevent the emergence of regional powers capable of jeopardising its security. Türkiye, for its part, aspires to establish itself as an autonomous regional power, expand its influence in the Middle East and play a decisive role in shaping the new landscape that has emerged following the political and military transformations of recent years.

Both states possess significant military capabilities, a growing defence industry and strategic relations with the major international powers. However, their respective geographical positions, security priorities and conceptions of regional leadership differ. Israel is a small state, whose security doctrine is based on technological superiority, intelligence, rapid response capability and the maintenance of a qualitative military advantage. Türkiye, by contrast, possesses greater strategic depth, armed forces of considerable size and a geographical position that enables it to project influence across Europe, the Caucasus, the Black Sea, the Middle East and the Mediterranean.

The fundamental question is whether this rivalry can be kept within the bounds of diplomatic, economic and indirect military competition or whether, on the contrary, it may lead to a direct confrontation. The issue takes on particular significance in Syria, where the security interests of both countries may coincide within the same operational theatre. The international dimension of this dispute must also be considered, particularly given Türkiye's membership of NATO and the strategic relations that the United States maintains with both Israel and Türkiye.

Israel and Turkey are heading towards a structural strategic rivalry, the main danger of which lies not in direct military confrontation, but in an unintended escalation, triggered by the overlap of their interests and operations – particularly in Syria – and by the difficulty of managing a crisis between two governments that harbour deep mutual mistrust.

From strategic cooperation to rivalry

Türkiye recognised the State of Israel in March 1949, becoming the first Muslim-majority country to do so. The decision reflected Ankara's desire to strengthen its pro-Western orientation, consolidate its relations with the United States and secure a favourable position within the international system that emerged after the Second World War. In the decades that followed, relations were shaped by the evolution of the Arab–Israeli conflict and by the priorities of Turkish foreign policy, although channels of communication between the two countries never completely dried up.

The end of the Cold War ushered in a period of rapprochement[1]. In 1996, the two states signed military cooperation agreements that facilitated the exchange of intelligence, joint exercises, the modernisation of certain Turkish weapons systems and cooperation between their defence industries. This rapprochement stemmed from converging interests: Türkiye sought to modernise its armed forces and strengthen its position vis-à-vis Syria, whilst Israel sought to expand its relations with Muslim countries and reduce its regional isolation. A shared concern over Iranian and Syrian influence, coupled with US support, helped to consolidate that relationship[2].

The Justice and Development Party's (AKP) rise to power in 2002 and the political rise of Recep Tayyip Erdoğan gradually shifted the priorities of Turkish foreign policy[3]. Ankara began to pursue a more active policy in the Middle East, accompanied by greater sensitivity towards the Palestinian question and a desire to exert influence across the Muslim world. Israeli policy in Gaza and the public confrontation between Erdoğan and

[1] Nail Elhan and Başar Şirin, "Revisiting the Turkish-Israeli Alliance of the 90s," *Israel Affairs* 30, no. 1 (2024): 40–55, https://doi.org/10.1080/13537121.2024.2295606

[2] Jonathan Ghariani, "Turkish-Israeli Relations: 'The Golden Years', 1991–2000," *Israel Affairs* 30, no. 1 (2024): 5–24, https://doi.org/10.1080/13537121.2023.2295602

[3] Lacin İdil Oztig, "Turkish-Israeli Relations under AKP Rule," *Israel Affairs* 30, no. 1 (2024): 56–69, https://doi.org/10.1080/13537121.2024.2295611

Israeli President Shimon Peres at the World Economic Forum in Davos in January 2009 highlighted the deterioration in relations[4].

The turning point came on 31 May 2010, when Israeli forces boarded the international flotilla seeking to break the blockade of Gaza. The raid on the *Mavi Marmara* resulted in the deaths of ten Turkish citizens and triggered a serious diplomatic crisis. Military cooperation came to a virtual standstill, and relations entered a phase of political confrontation[5].

Subsequent attempts at normalisation, particularly the agreements reached in 2016 and the restoration of diplomatic relations in 2022, failed to resolve the structural differences. The Palestinian question, Türkiye's role in Syria and the growing competition for regional influence continued to shape the relationship; consequently, diplomatic normalisation failed to rebuild the strategic trust that had characterised the 90s[6].

The Hamas attacks on 7 October 2023 and the subsequent Israeli offensive in Gaza led to a fresh rift. Ankara strongly condemned Israel's actions, Erdoğan stepped up his criticism of Benjamin Netanyahu's government, and Türkiye suspended its direct trade with Israel in May 2024. The Palestinian question thus evolved from being a recurring source of disagreement to becoming one of the main points of political confrontation between the two countries[7].

However, it would be insufficient to attribute the deterioration in bilateral relations solely to the Gaza war. The transformation of Syria, Türkiye's growing strategic autonomy, Israel's policy of pre-emptive security, and competition over the eastern Mediterranean and, in recent years, the Horn of Africa have created conditions of rivalry that are likely to outlast the current political situation.

[4] İlker Aytürk, "The Coming of an Ice Age? Turkish–Israeli Relations Since 2002," *Turkish Studies* 12, no. 4 (2011): 675–687, https://doi.org/10.1080/14683849.2011.622507

[5] Efrat Aviv, "Ladders and Ropes: Israeli–Turkish Relations 2010–20," *Israel Affairs* 30, no. 1 (2024): 70–82, https://doi.org/10.1080/13537121.2024.2295612

[6] Nurlan Muminov, "Cooperation and Conflict in Turkish–Israeli Relations Since the 90s," *Israel Affairs* 30, no. 1 (2024): 25–39, https://doi.org/10.1080/13537121.2024.2295604

[7] Michael B. Bishku, "Türkiye and the Palestinian and Jerusalem Issues," *Israel Affairs* 30, no. 1 (2024): 83–104, https://doi.org/10.1080/13537121.2024.2295614

Two different strategic projects

The rivalry between Israel and Türkiye can be explained primarily by the difference between their respective national and regional projects. Although both maintain relations with the United States and share certain security interests, their priorities and perceptions of the regional order are increasingly divergent.

For Israel, security is the cornerstone of its foreign policy. Its small territorial size, the proximity of several hostile actors and its historical experience of conventional and asymmetric conflicts have cemented a doctrine based on deterrence, technological superiority, and the ability to neutralise threats before they reach a scale that compromises its security. This approach explains the importance it attaches to intelligence, the air force, missile defence, and operational freedom of action.

Israeli policy aims to prevent its adversaries from establishing military infrastructure close to its borders or acquiring capabilities that would upset the regional balance of power. For years, this priority focused primarily on Iran, Hezbollah and the armed organisations present in Syria and Gaza, such as Hamas and Islamic Jihad. However, the transformation of the Syrian landscape – with the fall of Bashar al-Assad's regime and the rise to power of Ahmed al-Charaa – and Türkiye's growing influence in the country have introduced a new factor into Israel's security calculations. Ankara does not pose a threat on a par with Iran but its capacity for influence and its potential presence in areas close to Israel may shape its strategic decisions[8].

Türkiye is pursuing a different agenda. Its foreign policy seeks to expand national autonomy, reduce certain external dependencies and transform the country into a power capable of intervening in key regional affairs. This strategy combines its NATO membership with pragmatic relations with Russia, Iran, Qatar, and other Gulf states, as well as with various actors in the Middle East. Ankara does not intend to abandon its ties with the West but nor does it accept that these should exclusively determine its foreign policy decisions. Evidence of this is its accession in 2026 to the Mecca Pact alongside

[8] Amnon Aran, "Israeli Foreign Policy towards Türkiye Since 2011: From Adverse Asymmetry to Equivalence?," *International Politics* 63, no. 1 (2026): 25–49, https://doi.org/10.1057/s41311-024-00654-w

Saudi Arabia and Pakistan, to Regional Group 4 with the same countries plus Egypt, and to the so-called BADR Pact alongside Pakistan, Qatar, and Indonesia.

Türkiye's strategic autonomy is underpinned by its geography, the scale of its Armed Forces, the development of its defence industry and an increasingly active foreign policy. Its programme of unmanned aerial vehicles, naval systems, missiles, land vehicles, and national aeronautical projects form part of a strategy aimed at reducing technological dependence and increasing its capacity for external projection.

The Kurdish question constitutes another fundamental element of Turkish security. Ankara considers that the YPG[9], linked to the Kurdish political-military network in northern Syria, maintains an organic relationship with the PKK[10], an organisation designated as terrorist by Türkiye, the United States and the European Union. The possibility of an autonomous Kurdish territorial structure becoming established along its border is perceived by the Turkish Government as a direct threat to its national security.

The Palestinian issue completes the framework of Turkish priorities. The defence of Palestinian rights and the creation of an independent state enable Ankara to project political and diplomatic influence across the Muslim world. This stance has an ideological and domestic political dimension but it also reflects a desire for regional leadership. Studies on the evolution of Turkish political identity and its relationship with Israel show that ideological differences have taken on increasing significance in bilateral relations[11].

The divergence between the two countries' agendas does not mean that all their interests are incompatible. Israel and Türkiye may share objectives relating to regional stability, the security of certain trade routes or the limitation of Iranian influence. However, their differing views on who should exercise regional leadership, which actors should participate in the reorganisation of Syria and what role the Palestinian question should play give rise to a rivalry that is difficult to resolve.

[9] *Yekineyen Parastina Gel* or People's Protection Units.

[10] *Partiya Karkeren Kurdistan* or Kurdistan Workers' Party.

[11] Ayfer Erdoğan Şafak, "Türkiye and Israel: Evolution of State Identity and Shifting Relations," *Israel Affairs* 30, no. 1 (2024): 105–124, https://doi.org/10.1080/13537121.2024.2295616

The scenarios of the rivalry

Syria: the focus of military friction

Syria is currently the arena where the rivalry between Israel and Türkiye is most likely to take on a more direct military dimension. The fall of Bashar al-Assad's regime in December 2024 profoundly altered the regional balance of power and ushered in a new era in which Türkiye enjoys a position of considerable influence, whilst Israel seeks to safeguard its security in a political and military environment that remains uncertain[12].

For Ankara, Syria represents a border security issue but also an opportunity to consolidate its political and economic influence. Türkiye aims to prevent the establishment of an autonomous Kurdish entity on its southern border, to contribute to the reorganisation of Syrian institutions, and to maintain a decisive role in the country's future. Its military presence and its relations with various Syrian actors provide it with levers of influence that it is unlikely to be willing to relinquish.

Israel views this transformation from an unfamiliar perspective. For years, its priority was to prevent Iran and its allies from establishing military infrastructure near the Golan Heights or using Syrian territory to transfer advanced weaponry to Hezbollah. The reduction in Iranian influence has altered this scenario but has not eliminated Israeli concerns. The emergence of new authorities and the possibility of a greater Turkish presence raise questions about the future military balance. This concern has led Israel to extend its 'buffer zone' beyond the territory it annexed in the Golan Heights in 1981, under the pretext of protecting the Druze population in that area.

The problem does not necessarily lie in the fact that Israel and Türkiye have completely opposing objectives regarding Syria but rather in the fact that both seek to retain the capacity to influence its future course. Israel wishes to prevent Syrian territory from becoming a military platform that restricts its freedom of action, whilst Türkiye seeks to ensure that the country's reorganisation does not favour Kurdish structures it regards as hostile and, consequently, seeks to maintain sufficient influence to safeguard its interests.

[12] Mehmet Doğan Üçok, "Regime Change in Syria and the Emerging Israel–Türkiye Conflict," *Middle East Policy* 33, no. 1 (2026): 87–101, https://doi.org/10.1111/mepo.70019

This convergence of interests within a relatively limited geographical area can give rise to risky situations. The simultaneous presence of aircraft, advisers, military installations and surveillance systems increases the likelihood of incidents, particularly if there are no sufficiently developed mechanisms for communication and de-escalation[13].

In August 2026, the Israeli attack on the Abu al-Duhur military installation became a significant example of this tension. Israel expressed concern over a possible Turkish military presence, whilst the Turkish and Syrian authorities denied that the alleged deployment was planned[14]. It is therefore important to distinguish between the concerns expressed by Israel and the actual existence of a permanent Turkish military deployment, which should not be taken for granted without independent evidence.

Syria's future will also depend on the ability of its new authorities to consolidate institutions, integrate the various armed groups and establish balanced relations with its neighbours. If the country becomes an arena for competition between regional powers, Turkish Israeli rivalry could intensify. Conversely, a Syrian security framework accepted by the main actors and accompanied by guarantees that the territory will not be used against third parties could significantly reduce the risk.

Gaza and Palestine: a political and diplomatic rift

The war in Gaza has transformed the relationship between Israel and Türkiye and has made the Palestinian issue one of the main obstacles to any normalisation process. For Israel, the attacks of 7 October 2023 demonstrated the need to prevent Hamas and, to a lesser extent, other Palestinian groups from retaining sufficient military capabilities to organise further large-scale operations. For Türkiye, the Israeli response and its humanitarian consequences represent a violation of Palestinian rights and an obstacle to regional stability[15].

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[13] Buğra Sari and Avnihan Kirişik, "The Struggle for Syria: Strategic Rivalry and the Risks of Escalation," *Middle East Policy* 32, no. 4 (2025): 51–66, https://doi.org/10.1111/mepo.70012

[14] Alexander Cornwell and Tuvan Gumrukcu, "Israel and Türkiye Step Up Warnings over Syria after Airbase Bombing," Reuters, 20 August 2026.

[15] Nimrod Goren, "Israel-Türkiye Relations as Impacted by the War in Gaza and the Transition in Syria," Mitvim – The Israeli Institute for Regional Foreign Policies, May 2026.

Türkiye's position cannot be understood solely as a short-term reaction to the Israeli offensive. The Palestinian cause has become a key element of Erdoğan's foreign policy and a means of projecting influence across the Muslim world. Ankara maintains political contacts with Hamas, having hosted some of its leaders, and advocates the creation of an independent Palestinian state, with East Jerusalem as its capital. This stance heightens Israeli mistrust, as Israel considers that Türkiye is providing political legitimacy to a terrorist organisation responsible for the attacks of 7 October.

From the Israeli perspective, security and the elimination of Hamas's military capabilities are fundamental conditions for preventing a recurrence of attacks of this nature. However, the protracted conflict, the destruction of infrastructure and the humanitarian situation have resulted in considerable diplomatic and strategic costs. The absence of an accepted political solution and a stable governance framework for Gaza hinders the possibility of regional normalisation.

The confrontation also has an economic dimension. The suspension of direct trade between the two countries in 2024 was a measure of political pressure by Ankara, although it did not create an irreplaceable economic vulnerability for Israel. The Bank of Israel estimated that Türkiye had supplied goods worth approximately $5.3 billion in 2023, equivalent to 6.3% of Israeli imports. The search for alternative suppliers subsequently reduced the impact of the embargo[16].

The Palestinian issue will continue to shape the relationship, even if there is a reduction in violence in Gaza. An improvement in the humanitarian situation could facilitate indirect contacts and a limited easing of tensions but would not in itself resolve the existing differences.

The Eastern Mediterranean: energy, alliances and competition over routes

The Eastern Mediterranean represents a third arena of competition, albeit with different characteristics from those observed in Syria and Gaza. Here, rivalry manifests itself

[16] Bank of Israel, "The Impact of the Turkish Embargo on Israel's Economy," 19 March 2025.

primarily through energy, regional alliances, the delimitation of maritime zones and influence over trade routes[17].

Israel has developed major natural gas extraction projects, particularly at the Tamar and Leviathan fields. These resources contribute to its energy security and enable it to maintain cooperative relations with Egypt and other regional actors. Türkiye, for its part, aspires to become a hub for energy transit and distribution, capitalising on its geographical position between producers in the Middle East, the Caucasus and European markets.

Disputes between Türkiye, Greece and Cyprus over maritime delimitation and exploitation rights have complicated certain energy projects. Israel has strengthened its relations with Greece and Cyprus through political, military and economic cooperation mechanisms. This rapprochement stems from shared interests, although it should not automatically be interpreted as the existence of a formal military alliance directed against Ankara[18].

Furthermore, in October 2026, the Parliament of eastern Libya formally ratified the controversial maritime agreement signed in 2019 between Türkiye and the UN-recognised government of Tripoli to delimit their exclusive economic zones and continental shelves in the eastern Mediterranean. The agreement establishes a maritime jurisdictional boundary between the southern coast of Türkiye and the northern coast of Libya and creates a direct economic corridor[19].

The energy rivalry has a broader geopolitical dimension. Control over infrastructure, transport routes and supply agreements can yield economic and diplomatic advantages. Consequently, the rivalry between Israel and Türkiye is part of a wider dispute over the configuration of the eastern Mediterranean and over which country will have the greatest capacity to influence its main strategic corridors.

[17] International Institute for Strategic Studies (IISS), “Turbulence in the Eastern Mediterranean: Geopolitical, Security and Energy Dynamics”, Chapters 1 and 2, IISS, 6 December 2024.
[18] International Institute for Strategic Studies (IISS), “Turbulence in the Eastern Mediterranean: Geopolitical, Security and Energy Dynamics”, Chapters 7 and 8, IISS, 6 December 2024.
[19] Memorandum of Understanding between the Government of the Republic of Türkiye and the Government of National Accord of Libya on the Delimitation of Maritime Jurisdiction Areas in the Mediterranean, signed in Istanbul on 27 November 2019, registration no. 56119, volume 3338.

Unlike in Syria, this scenario presents a lower risk of direct military confrontation but it may contribute to the consolidation of regional cooperation blocs and to increased mistrust between the two countries.

The Horn of Africa and the Red Sea: a new dimension to the strategic rivalry

The Horn of Africa has become an emerging arena for competition between Israel and Türkiye, owing to its strategic position overlooking the Gulf of Aden, the Bab el-Mandeb Strait and the maritime routes linking the Indian Ocean with the Red Sea and the Mediterranean. Control of access routes, the safety of navigation and the potential to establish positions of influence in this region are of growing importance to both countries.

Türkiye has consolidated a significant presence in Somalia through economic cooperation agreements, development aid and military assistance. The TURKSOM military base in Mogadishu is a key element of this projection, complemented by defence and maritime cooperation agreements. For Ankara, Somalia represents a platform from which to expand its influence in Africa and strengthen its position in the Red Sea region[20].

Israel, for its part, has found in Somaliland an opportunity to expand its strategic presence in the Gulf of Aden. Its recognition of this territory in December 2025 has ushered in a new phase of relations and cooperation, with potential implications for maritime security and the monitoring of Houthi activities in Yemen. This approach contrasts with Türkiye's position, which supports Somalia's territorial integrity, adding a new source of friction between the two countries[21].

The rivalry is also unfolding in a region where the interests of other actors—such as the United Arab Emirates, Saudi Arabia, Egypt and Ethiopia—converge, particularly regarding ports, strategic infrastructure and access to the sea. Consequently, the Horn of Africa extends the competition between Israel and Türkiye beyond the Middle East and

[20] Republic of Türkiye, Ministry of National Defence, "Framework Agreement on Defence and Economic Cooperation between Türkiye and Somalia," 8 February 2024; Federal Government of Somalia, "Framework Agreement on Defence and Economic Cooperation between Türkiye and Somalia," 22 June 2026.
[21] State of Israel, Ministry of Foreign Affairs, "Israel Recognises the Republic of Somaliland as an Independent and Sovereign State," 26 December 2025; Reuters, "Israel Becomes First Country to Formally Recognise Somaliland as an Independent State," 26 December 2025.

projects it onto one of the most sensitive maritime corridors for international trade. Although direct military confrontation seems unlikely, the consolidation of opposing positions could generate new diplomatic tensions and increase the risk of incidents and indirect escalations.

The international dimension: the United States, NATO and regional powers

The rivalry between Israel and Türkiye cannot be understood without considering the position of the major powers. The United States is the main external actor with the capacity to influence both countries and is the most important restraining factor in the event of an escalation[22].

Israel maintains a privileged strategic relationship with Washington, based on military, technological and intelligence cooperation. The current memorandum of understanding for the 2019–2028 financial period provides for US military aid of $3.8 billion annually, although President Trump has announced that he intends to end this aid earlier than planned, possibly as early as the end of 2026[23]. Türkiye, for its part, has been a member of NATO since 1952 and occupies a geographical position that is essential to the security of the Black Sea, the Mediterranean and the Middle East.

Washington must balance two relationships that serve different interests. It cannot easily do without Türkiye, whose geographical position and military capabilities are important to the Alliance but nor can it weaken its strategic relationship with Israel. A confrontation between the two countries would create a major diplomatic and military problem for the United States.

Russia is another key player. Moscow has maintained a pragmatic relationship with Türkiye, based on energy, trade and the management of regional conflicts, although both countries compete for influence in certain areas. It has maintained channels of communication with Israel for years, particularly to prevent military incidents in Syria. An

[22] Reuters, “Syria, Israel Hold US-Mediated Talks to Ease Tensions,” 23 August 2026.
[23] Emanuel Fabian, “Trump aide’s bombshell could trigger a scramble to reprioritise upcoming arms purchases,” The Times of Israel, 4 November 2026.

escalation between Ankara and Tel Aviv could present diplomatic opportunities for Moscow but could also harm its interests if it increases regional instability[24].

Iran occupies a different position. It is one of Israel's main strategic adversaries, whilst its relationship with Türkiye combines cooperation and competition. Both countries have economic and diplomatic interests but they disagree over influence in Syria, Iraq and the Caucasus. The reduction of Iran's presence in Syria may favour Turkish objectives, although it does not eliminate the rivalry between Ankara and Tehran.

Saudi Arabia and the United Arab Emirates have developed pragmatic relations with Türkiye and maintain ties of varying nature with Israel. The Abraham Accords, with the accession of the UAE, altered the regional diplomatic landscape, although the war in Gaza has hampered their expansion. Egypt, for its part, is a key player in Gaza's security, regional stability and energy projects in the eastern Mediterranean[25].

The European Union also has a direct interest in the stability of this relationship. Türkiye is a key economic and strategic partner, whilst Israel has maintained an association agreement with the EU dating back to 2000, which has been criticised by some European countries due to the Gaza war. The possibility of the rivalry spreading to the eastern Mediterranean affects maritime security, trade routes, and European energy policy. Europe's main contribution could be to facilitate communication channels, support de-escalation efforts, and prevent regional competition from spilling over into Euro-Atlantic security structures[26].

Military capabilities and the balance of power

A military comparison between Israel and Türkiye must consider not only the size of their armed forces but also technological capability, training, the defence industry, organization and the capacity to sustain prolonged operations.

[24] Natalie Sabanadze and Galip Dalay, "Understanding Russia's Black Sea Strategy: How to Strengthen Europe and NATO's Approach," Chatham House, 28 July 2025.
[25] Sanam Vakil and Neil Quilliam, "The Abraham Accords and Israel-UAE Normalisation: Shaping a New Middle East," Chatham House, 28 March 2023.

[26] European External Action Service, "The European Union and Israel," 28 July 2026, https://www.eeas.europa.eu/israel/european-union-and-israel_en?s=200

In 2025, Israeli military expenditure stood at approximately $48.3 billion, whilst Türkiye's was close to $30 billion. In Israel's case, military spending accounted for around 7.8% of GDP. Türkiye recorded an estimated year-on-year increase of 7.2%[27].

These figures reflect two different investment models. Israel makes a very substantial budgetary commitment, linked to its security needs and the military operations of recent years. Türkiye, for its part, maintains a trend of growth in military investment, driven by the modernisation of its armed forces, its external projection and the development of a thriving and emerging domestic industry.

Israel maintains a technological edge in areas such as intelligence, electronic warfare, missile defence and certain precision-guided systems. Its air force is one of the main pillars of its military doctrine and comprises F-35, F-15 and F-16 aircraft. Added to this is an air defence and missile defence architecture that includes systems such as Arrow, David's Sling and Iron Dome.

Türkiye, for its part, has larger armed forces and a greater territorial depth. Its air force relies primarily on F-16s, whilst its modernisation and development programmes aim to reduce dependence on foreign suppliers. Turkish industry has achieved a leading position in unmanned aerial vehicles, ground systems, naval platforms and munitions.

The comparison must also consider the capacity for production and replenishment of equipment. Israeli industry possesses a high degree of technological specialisation, particularly in electronics, sensors, missiles and air defence. Türkiye has developed a more diversified industrial base, with growing export capacity and a deliberate policy of import substitution.

There is, therefore, no absolute superiority of either country across all military dimensions. Israel possesses qualitative advantages in certain areas, whilst Türkiye has greater territorial depth, a larger force size and greater regional projection capability. The outcome of a hypothetical confrontation would depend on the scenario, the objectives, the duration, external support, and the logistical capacity of each state.

[27] Stockholm International Peace Research Institute (SIPRI), *Trends in World Military Expenditure, 2025* (Stockholm: SIPRI, April 2026).

Türkiye's membership of NATO also constitutes a political factor that distinguishes this rivalry from other regional confrontations. A military crisis between the two countries could affect Ankara's relations with its allies and force the United States and the Alliance to undertake a delicate exercise in mediation.

Scenarios and outlook for 2026–2030

The evolution of the rivalry will depend on the interplay between the security needs of both countries, the situation in Syria and Gaza, US policy, and the ability of regional powers to contain new crises. It does not seem reasonable to envisage a single outcome but rather to consider various possible trajectories.

The first scenario, and probably the most plausible, is that of a contained rivalry. Both countries would maintain opposing political positions, continue to develop their military capabilities and seek to expand their relations with third parties, whilst avoiding direct confrontation. Competition would take the form of diplomatic pressure, economic measures, regional alliances and demonstrations of military capability. This scenario would allow both states to preserve their vital interests without incurring the costs of war.

A second scenario would be the intensification of strategic competition. In this scenario, differences over the region's future would deepen, and both countries would seek to strengthen their influence through political, economic and military means. The rivalry could extend to energy, the defence industry, trade routes and cooperation with third states. Although it would not necessarily lead to a direct confrontation, it would increase mistrust and reduce diplomatic room for manoeuvre.

The third scenario would be a limited military crisis, triggered by an incident directly affecting personnel or facilities of one of the two countries. The death of military personnel, the interception of an aircraft or an attack on a sensitive facility could trigger retaliation and lead to an escalation with consequences that are difficult to predict. In such a context, the United States would play a decisive role in establishing de-escalation mechanisms and preventing a specific crisis from turning into a wider confrontation.

Finally, a pragmatic détente cannot be ruled out. The economic and military costs of a protracted rivalry, the need to maintain channels of communication and pressure from

third parties could favour a limited rapprochement. This would not mean a return to the alliance of the 90s but it would involve re-establishing diplomatic mechanisms and specific security agreements.

These categories do not represent statistical probabilities but rather an assessment of the trends and determining factors that have been observed. The scenarios may overlap and evolve from one to another.

Conclusions. Strategic competition at risk of escalation

The evolution of relations between Israel and Türkiye reflects a profound transformation of the geopolitical balance in the Middle East. Both countries have moved from a phase of strategic cooperation to one characterised by mistrust, regional competition, and diverging interests.

The Gaza war has deepened political differences, whilst the transformation of Syria has added a particularly sensitive military dimension. Competition over the eastern Mediterranean, the Horn of Africa and energy routes complete a scenario in which the rivalry can no longer be regarded as a mere diplomatic crisis.

Israel aims to preserve its regional superiority and prevent other states from restricting its freedom of action. Türkiye seeks to consolidate its influence in Syria, expand its strategic autonomy and project regional leadership. Their objectives are not incompatible in all areas but they may clash when they affect control over strategic areas, the security of their borders or the ability to influence third parties.

A military comparison shows that both countries possess significant capabilities, albeit of a different nature. Israel maintains significant technological advantages, whilst Türkiye has greater territorial depth, a sizeable military force and an expanding defence industry. Neither can regard the other's capabilities as insignificant.

However, there are significant factors acting as a restraint. The economic and military cost of a war, both countries' relationship with the United States and Türkiye's membership of NATO make a direct confrontation unattractive to both governments. Mutual deterrence and the need to preserve their respective international relations are fundamental factors in preventing an escalation.

The main danger lies in a limited crisis potentially exceeding the initial forecasts of both governments. Syria is the theatre where this risk is most evident, due to the proximity of operations, political uncertainty, and the lack of trust between Ankara and Tel Aviv. For this reason, the future of the relationship should not be analysed exclusively in terms of war or peace. The most likely scenario is a protracted rivalry, featuring episodes of tension, diplomatic pressure, and military posturing, accompanied by sporadic attempts to avoid direct confrontation.

In short, Israel and Türkiye are not doomed to clash militarily but their strategic agendas are entering an area of friction that is becoming increasingly difficult to manage, turning their relationship into a structural rivalry that could drag on for years. The question is not so much whether both countries want a war but whether they will be able to prevent a limited crisis from ultimately triggering a confrontation that neither had foreseen. From a European perspective, the main challenge lies in preventing this rivalry from becoming a new destabilising factor in a Middle East already characterised by multiple interconnected conflicts.

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