

# Hungary's Great Rearmament: A Small Military's Big Transformation in the 21st Century

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October 2025

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Image: Ceremonial guards in Revolution-era Hungarian military dress, from Shutterstock.



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## About the Danube Institute

The Danube Institute, established in 2013 by the Batthyány Lajos Foundation in Budapest, serves as a hub for the exchange of ideas and individuals within Central Europe and between Central Europe, other parts of Europe, and the English-speaking world. Rooted in a commitment to respectful conservatism in cultural, religious, and social life, the Institute also upholds the broad classical liberal tradition in economics and a realistic Atlanticism in national security policy. These guiding principles are complemented by a dedication to exploring the interplay between democracy and patriotism, emphasizing the nation-state as the cornerstone of democratic governance and international cooperation.

Through research, analysis, publication, debate, and scholarly exchanges, the Danube Institute engages with center-right intellectuals, political leaders, and public-spirited citizens, while also fostering dialogue with counterparts on the democratic center-left. Its activities include establishing and supporting research groups, facilitating international conferences and fellowships, and encouraging youth participation in scholarly and political discourse. By drawing upon the expertise of leading minds across national boundaries, the Institute aims to contribute to the development of democratic societies grounded in national identity and civic engagement.



## About the Turkic-Western Engagement Initiative

The Danube Institute's Turkic-Western Engagement Initiative (TWEI) is a dedicated platform to deepen understanding and foster strategic coordination between the Turkic world and the West. Rooted in Hungary's unique position as the only EU and NATO member state with institutional ties to the Organization of Turkic States, TWEI examines the growing geopolitical and economic significance of the Turkic region—from energy corridors and critical mineral reserves to industrial development, and regional security trends. By regularly convening experts, policymakers, and scholars from OTS countries and the West, TWEI works to identify areas where mutual interests can foster lasting strategic cooperation.

TWEI includes projects such as its annual flagship Turkic-Western Geopolitical Dialogue Conference, Turkic Silk Road Internship Program, research projects on Hungarian and Western Engagement with the Turkic world, and the linking of Turkic and Western think tanks. As the landscape of global politics shifts and the role of the Turkic world expands, the Turkic-Western Engagement Initiative positions the Danube Institute and Hungary as a whole as a central convening point where ideas are exchanged, partnerships are formed, and practical solutions are developed.

## About the Authors



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# **Hungary's Great Rearmament: A Small Military's Big Transformation in the 21st Century**

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## **Abstract**

Hungary disarmed after the Cold War ended, following global trends to save resources during its transition to a capitalist economy. Much of the country's military capabilities were diminished as a result. In 2014, the country slowly began its rearmament under the framework established by the framework of the Zrínyi 2026 program and adjusted its strategic culture accordingly. These arms purchases offered Hungary new opportunities for international industrial cooperation. This paper focuses on key platforms and strategic documents of the Hungarian armed forces and explores the twists and turns of disarmament. It highlights emerging NATO pressure to rearm following Hungary's accession, then turns to analyzes of platforms and bilateral partnerships to uncover patterns of Hungarian rearmament in the international system and the new partnerships it has fostered.

## Introduction

After decades of sliding into strategic inertia, Hungary and its neighbors in Central and Eastern Europe are rearming precipitously in the wake of Russia's 2014 intervention in Crimea, and the 2022 war in Ukraine. This frenzy of rearmament constitutes a break from the post-1989 calm strategic environment in Eastern Europe. With sudden rearmament, interior strategic culture and external supply chains are now being reshaped. Hungary has begun to increase its number of military personnel, and modernized its equipment, expanding the state's defense capabilities. This rearmament has had rippling effects on the expansion of Hungarian strategic thinking and international relations as well. It has assisted in the development of assertive regional politics and international ties emerging industrial giants.

This research paper illustrates the multifaceted nature of Hungary's great rearmament. First, this will be shown in contrast to the country's post-communist disarmament, and how these changes altered existing perceptions of the military. Further, the development of Hungarian administrative thinking about rearmament will be shown from the

history of strategic documents and subsequent legal reform. Finally, the paper will take a detour and add a new angle on how logic adjustments and then successive administrative developments produced the "new" Hungarian military as a physical set of new armament platforms operated by newly recruited soldiers.

It will be shown that through international sourcing of military equipment—such as Brazilian transportation planes and Turkish-modeled armored personnel carries—how Hungary's present rearmament has diversified its foreign trade and industrial cooperation capabilities.

The paper paints a vital picture of Hungary in the mid-2020s, specifically, how rearmament fits into broader patterns of the state's behavior. Rearmament is a continuing process throughout Central and Eastern Europe. It calls for understanding of rearmament's second-order effects on emerging industrial partnerships and changing regional strategies.





*Hungarian Ministry of Defense Building, Budapest. (Shutterstock).*



## The Process of Disarming and Rearming: 1989-2025

In 1991, just after the regime change, the Hungarian armed forces across all services constituted 86,500 regular and 210,000 reservist servicemen.<sup>1</sup> This was approximately the same number of personnel as the United Kingdom's armed forces, a country that at that time had a proper navy, various global military commitments, six times the population and thirty-three times Hungary's GDP measured in USD. Before the "Zrínyi 2026" rearmament program launched in 2017, however, in the aftermath of decades of deterioration, the same Hungarian army could not field a single infantry brigade, had neither deployable tanks nor artillery, and in 2010 a reservist force close to zero. What happened and why this long decline from an oversized to an undersized army?

The oversizing is easily explicable. The armies of the Warsaw Pact, Hungary included, were personnel- and equipment-heavy land forces designed to crush NATO with their mechanized mass. With doctrines based on the "deep battle" of the late Tukhachevsky, the emphasis was on creating a critical quantitative mass against opposing land forces, not the pursuit of qualitative advantage.

Of course, it was unsustainable. Not just for the Warsaw Pact, but apparently, for all the sides of the bipolar world. In his seminal 1987 book, *The Rise and Fall of the Great Powers*, the American historian Paul Kennedy warned about the incompatibility of high Western military spending with maintaining economic competitive advantage, while, he noted, weaponry costs were increasing rapidly beyond inflation.

*"This leaves the politicians (of any party) with the alternative of reducing commitments and enduring the consequence thereof; or of increasing defense expenditures still further (...) and thereby reducing its own investment in productive growth (...)."2*

At that time, the number one Western power, the US, spent more than 6% of its GDP on military spending and had run a budget deficit since 1969.<sup>3</sup> Kennedy's primary dilemma was the exorbitant cost of newly developed weapon systems, which encroached on increasing parts of national budgets. The Soviets themselves spent at least 15% of their GDP on the military, while mismanaging their economy to the extent of food shortages and near-economic collapse in a nation rich in fossil fuels and arable land. The American social scientist warned about the impending economic decline of not only the weakest link, the USSR, but the Western world

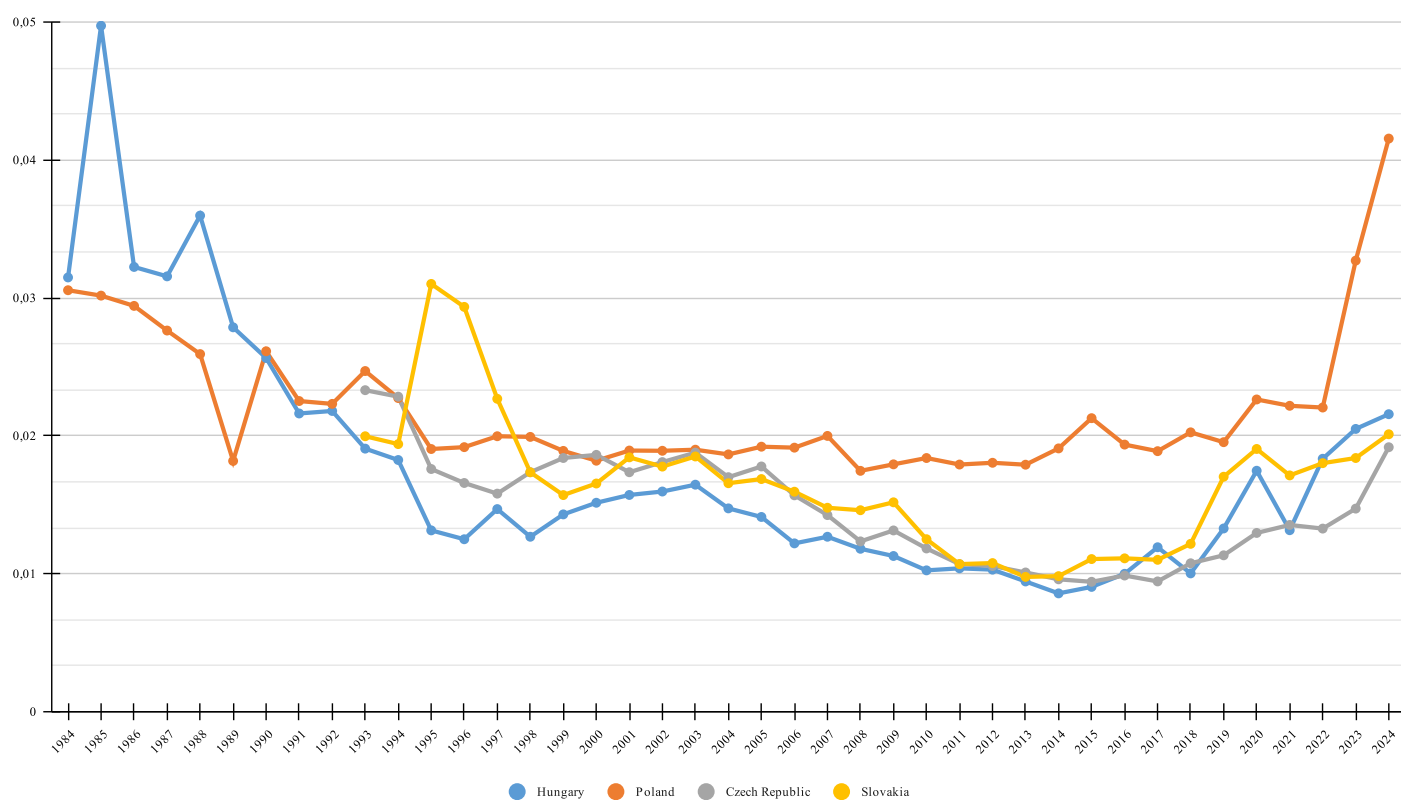
in general, if economic competitiveness was not regained vis-à-vis its East Asian competitors. Of course, the number one Asian economy of 1987, Japan, in the end proved a "paper tiger" in the sense that its economic model run into a dead end by the 1990s.<sup>4</sup> Generally, though, the East Asian economies have indeed roared since the time of Kennedy.

If this narrative is believed, it can be seen that the post-Soviet period in world history as a golden opening for the West to enjoy the dividends of peace. The end of the Cold War, in this sense, presented an important opportunity to cut force sizes and military budgets. The Poles, with their weak economy and social unrest, started to cut even earlier. The Hungarians were, as customary of their intra-bloc strategy, much more timid and always cozying up to Soviet demands to the maximum, at least on the face of it. In the same year when the Poles introduced steep cuts, the Hungarian defense Forces only introduced a "reorganization" called RUBIN-plan, that saved costs but maintained the armed forces' full capability on paper.<sup>5</sup> As the system thawed, they embarked on a trajectory of cuts in 1989 and did not stop throughout the 1990s, even in the face of impending NATO accession. In the first year, they cut 9% of personnel but even more from heavy equipment, removing 251 tanks from active service.<sup>6</sup> The whole exercise was helped along by the Treaty of Conventional Forces in Europe, signed on November 19 1990—the last great achievement of the geopolitical "fire sale", as Strobe Talbott called the imperial collapse period of the Soviet Union.<sup>7</sup> In 1992, 510 more tanks were disabled and the number of personnel decreased by another 22%.<sup>8</sup>

Even while the Yugoslavian conflict was raging and Hungary had peace-keeping obligations, the following years saw accelerated reduction. In 1995, Hungary embarked on its landmark neoliberal restructuring program, the "Bokros-package", named after the Minister of Finance in the 1994-1998 left-wing government. The cost-cutting campaign eyed the Honvédség as well, first planning a 50% personnel reduction, which was eventually stopped at "only" 30%, signalling the spirit of the times.<sup>9</sup>

New alliances helped Hungary to avoid any new defense obligations. Patrol boats of the just-formed European Union helped guard the fluvial border of Hungary and Yugoslavia to keep the trade embargo against the Serbs,<sup>10</sup> and the AWACS planes of the NATO tracked Serbian planes<sup>11</sup> so that they would not cross into Hungarian airspace as they had in October 1991, when they hit the border town Barcs

## Defense Spending of the V4 Countries Since 1984 as a Ratio of GDP



*Graph representing the V4 countries' annual expenditure on defense.<sup>12</sup>*



with air-launched bombs.<sup>13</sup> In late 1995, after the Treaty of Dayton and the advent of new Bosnian peacekeeping operations, the American element of the new Implementation Force (IFOR) asked Budapest to offer a Hungarian staging base for operations in Bosnia. The Hungarians offered the Kapos airbase in Somogy county near Taszár village, and used the opportunity to disband their local air-group based there.<sup>14</sup>

In 1997, a wholesale auctioning of military-owned real estate followed the reduction of personnel. Hungary streamlined its forces as it approached its entry into NATO. Almost two-thirds of its buildings were sold on the market and many installations (non-marketable) moth-balled. At the same time, however, the left-wing government committed to raising Hungarian defense spending to 1.81% of GDP by 2001. That did not happen; nor did the 2002 commitment to raise it to 2.1% by 2006 materialize. Spending edged up to 1.65% of GDP by 2003, but then declined precipitously, not increasing again as a percentage of GDP until 2016.

This restructuring left the Hungarian Army lacking many capabilities, while the West did not offer much understanding in the face of reorganization. In a December 2002 article for *Foreign Affairs*, Celeste A. Wallander, then a senior fellow at CSIS (and later Assistant Secretary of State during Joe Biden) called for the establishment of enforceable standards and even expulsion mechanisms against “disappointing members”, among which Hungary was singled out.<sup>15</sup> Wallander’s concerns were primarily political—she clearly despised the then just-deposed 1998-2002 Fidesz government and branded it as a geopolitical liability to NATO. Supporting her political position, however, she freely quoted NATO officials that Hungary was “the most disappointing new member of NATO” in terms of commitments. Given that Hungary was still a struggling Central European republic, it certainly caused bad blood, especially on the center-right and right, that the incoming MSZP government, which Wallander had said was a “step at the right direction”, managed to send military spending as a percentage of GDP to the even lower level of 1.22% by 2006.

In the 2000s, as military spending targets were missed year after year and the global financial crash of 2008 hit, the armed forces declined even further, while redistributing its funds to maintain some elements that served NATO standards. The second-hand MiGs were replaced by JAS Gripen jet fighters in a deal amid corruption suspicions and the semi-veiled lobby of the US for Hungary to buy second-hand F-16s instead.<sup>16</sup>

Meanwhile, the mothballed equipment was given away to cater for Western strategic needs. After the invasion of Iraq by the United States, the Hungarian government donated no fewer than 77 T-72 tanks, 36 armored personnel carriers and four support vehicles to the reorganizing armed forces of Iraq, as well as 4 million rounds of ammunition of different calibres.<sup>17</sup>

After the 2007 economic crisis, Hungarian defense spending as a ratio of GDP did not recover until the Ukraine crisis of 2014, when it was 0.86%. The left-wing government until 2010 simply did not have the means to spend more and when Fidesz returned to government, it apparently continued to save costs on the armed forces so its economic program could be fulfilled.

After the steep cuts introduced throughout the decades, in 2015, the Hungarian Army contained just 26,500 active and (if everybody is counted who received training and is of active age, as the Military Balance does apparently) 44,000 reserve personnel, while Hungarian statements claim that the reservist system was reconstituted from “literally zero” in 2010.<sup>18</sup> The steep decline of reservist forces is explained by the discontinuation of conscription in 2004 and the slowly declining active male population, but the active force size declined by more than half as well. The picture is even harsher if we look at reductions in capability. While tactical FPV drones are highly popular, another notable facet of the Ukraine battlefield is artillery and long-range ballistic and cruise missile capabilities, like the HIMARS-ATACMS platform of the Ukrainians,<sup>19</sup> Storm Shadows,<sup>20</sup> the just recently (in August 2025) unveiled low-cost Flamingo missiles, and the like.<sup>21</sup> The Hungarian artillery was a force of diverse capabilities during the Warsaw pact, yet downsizing not only trimmed fat but gutted the service totally. Some light mortars aside, before the introduction of the PzH 2000s purchased in 2018 artillery capability was nonexistent, aside from some mothballed Soviet-era howitzers.

Hungary also possessed deep strike capabilities with the short-range R-300 Elbrus ballistic missile system (known as Scud-B in NATO countries) that were part of the weaponry of the 5th Tank Brigade, based near the town of Tapolca in Veszprém county, and “missile companies” distributed among infantry brigades. While these were clumsy, inaccurate and outdated by the 1990s, it is worth noting that at the same time the Scud was the only weapon in the Iraqi arsenal capable of constituting a real threat in the 1991 Gulf War, regularly striking rear areas, and causing the US to rapidly develop anti-ballistic capabilities for its cutting-edge Patriot

missile system.<sup>22</sup> The Tapolca Missile group was downgraded and then struck from the register without any replacement,<sup>23</sup> since when Hungary has not had any long-range missile strike capability. It is a classic case of the trajectory of disarmament and rearmament in the Eastern Flank of NATO. The capability was redundant and ancient, without the strategic need nor any financial opportunity to maintain or upgrade it in the 1990s. All the while, such weaponry was in the cross-hairs of the CFE treaty. In the 2020s they would be much more relevant, but it is almost impossible to imagine them reconstituted, even in a high-spending period.

Kennedy's warnings and the need to erase the Cold War-era relics was timely in the 1990s. The paradox is now that, despite these still-relevant warnings about the economic costs of military spending, Hungary must face a US administration keen to share more burden with European partners and a rising Russian threat in the East. All the while, the European Union's economy, to which Hungary is buoyed, is struggling to get GDP growth off the ground.

Personnel expansion is going steadily. The aim defined in 2018 was to expand the armed services to 37,500 and the amount of reservists to 20,000.<sup>24</sup> Following vigorous recruitment drives, including an all-out media offensive with military-themed TV series and reality shows, in 2024-25 the number of personnel shot up to 32,150 according to OSINT sources, which is almost a 20% increase.<sup>25</sup> Reservists are hard to count, but the official data is "over 12,000" by 2023, and it is increasing rapidly.<sup>26</sup> The apparently costlier and slower process, however, is to outfit the Hungarian army with new platforms that the expanded force can use. Since 2020, the Hungarian economy has not shown rapid expansion<sup>27</sup> and, due to debates with the EU, cohesion funds have been cut as well.<sup>28</sup> Still, Hungary is increasing its GDP-percentage defense spending steadily, reaching the baseline NATO spending target of 2% in 2023 and being above it since.

While bearing economic costs, the rearmament process provides new opportunities to enhance Hungarian networking potential. While the finances need to be squeezed out, showing up as a hard-currency NATO buyer on the broadening field of military suppliers has its own advantage of building ties with suppliers and their home states that can burgeon through into other fields as well.





*Hungarian Air Force Mil Mi-17 military transport helicopter, Szolnok.  
(Shutterstock/Soos Jozsef).*



## The Great Rearmament: Strategic Planning and Direction

Hungary's contemporary rearmament strategy represents a decisive shift away from post-Cold War patterns. It constitutes a deliberate effort to reconfigure the Hungarian Defense Forces (HDF) as a capable and regionally significant military instrument embedded in NATO's eastern flank posture. It is also a rediscovery of Hungary as a nation independently capable of looking after its own defense.

The intellectual and policy foundation of this transformation rests on three interrelated elements: the adoption of a new strategic framework through the *National Security Strategy* (2020) and *National Military Strategy* (2021) and a comprehensive reform of defense regulation in 2024. Together, these initiatives seek to ensure that Hungary can defend its sovereignty, contribute effectively to NATO and adapt to the challenges of hybrid and high-intensity warfare. From symbolic commitments to broader ambitions.

The evolution of Hungarian strategy is inseparable from its earlier neglect. As Péter Tálas has pointed out, Hungary only adopted its first National Military Strategy in 2009, two decades after the regime change and a decade after NATO accession. This delay indicated not only a lack of strategic culture but also the low political priority given to military affairs.<sup>29</sup> Even the 2012 update, while acknowledging new risks, reflected a mindset in which NATO's collective guarantees were expected to substitute for robust national capabilities.<sup>30</sup> Tálas underlines that Hungarian political elites and society alike consistently relegated defense to the lower end of priorities, privileging economic and social concerns instead.<sup>31</sup>

After defense spending picked up from 2017, the publication of the *National Security Strategy* in 2020 and the *National Military Strategy* (NMS) in 2021 marked a break with this policy inertia. The 2020 NSS explicitly stated that Hungary must be able to "independently guarantee the fundamental conditions of national security" while simultaneously fulfilling alliance obligations.<sup>32</sup> The 2021 NMS went further, setting out the objective of transforming the HDF into a modern, sustainable, flexible and effective force with balanced structure, high combat effectiveness and full NATO compatibility, capable of deterrence, territorial defense, civil support and international deployments.<sup>33</sup> In doing so, it departed from the minimalist aspirations of earlier white papers and projected an ambitious regional role for Hungary.

### Commitments: NATO's Eastern Flank

Hungary's strategic documents must also be situated within the framework of NATO's eastern flank. The 2014 Wales Summit commitment to raise defense expenditures to 2% of GDP provided a baseline for national rearmament.<sup>34</sup> Initially slow to respond, Hungary accelerated its budgetary allocations after 2016, surpassing the 2% benchmark by 2023.<sup>35</sup> This fiscal commitment enabled the implementation of the rearmament program 'Zrínyi 2026' and the structural reforms embedded in the 2021 NMS, while at the same time reflecting a dual imperative: to demonstrate credibility within NATO solidarity while maintaining space for national decision-making in line with sovereignty concerns.<sup>36</sup>

This duality is evident in capability development. Hungary has pledged to align its force structure with NATO priorities, including air policing in Slovakia and Slovenia, participation in the Alliance's forward presence and the establishment of heavy mechanized brigades. At the same time, national doctrine emphasizes territorial defense, resilience and the ability to act autonomously in crises where allied support may be delayed.<sup>37</sup>

### Institutional and Regulatory Reforms

Hungary's rearmament strategy extends beyond procurement to institutional and legal adaptation. The *Defense and Security Regulation Reform in Hungary* (2024) argued that the 20th-century regulatory framework was inadequate for the multidimensional threats of the 21st century, ranging from cyberattacks to pandemics and mass migration.<sup>38</sup> Consequently, subsequent amendments broadened the competence of the armed forces in domestic security, integrated crisis management into a whole-of-government approach and clarified command authority by separating the Ministry of Defense's administrative role from the Commander of the HDF, established in 2019.<sup>39</sup> These reforms were partly shaped by the practical challenges faced during recent crises, including migration.<sup>40</sup>

### Strategic Coherence and Political Will

The coherence of Hungary's current defense strategy lies in the unprecedented convergence of political will, fiscal commitment and doctrinal clarity. For the first time since the early 1990s, defense modernization enjoys insulation

from cyclical budgetary cuts and has received top-level political endorsement. The Zrínyi 2026 program institutionalized procurement objectives, while the 2021 NMS embedded them in doctrine, linking strategic vision with measurable targets such as the establishment of three to four combat brigades, layered air defense and a reserve force of 20,000 personnel.<sup>41</sup>

Challenges remain. Hungary's strategic ambitions may outpace its fiscal and industrial base, raising questions about long-term sustainability.<sup>42</sup> Moreover, the durability of political consensus is uncertain in a polarized domestic environment. The test of Hungary's rearmament strategy will be whether it can endure beyond the present cycle of heightened threat perception and translate into a sustained strategic culture, rather than a temporary reaction to crisis.

### **Zrínyi 2026 and Recent White Papers**

The Zrínyi 2026 Defense and Military Development Program, launched in 2017, forms the backbone of Hungary's rearmament. It aims to remedy decades of under-investment by replacing obsolete Soviet-era systems, establishing a balanced brigade structure and revitalizing the defense industry through international partnerships and domestic production. The program also prioritizes personnel expansion, reserve development and the integration of cyber and air defense capabilities. Unlike earlier ad hoc efforts, Zrínyi 2026 provides a medium-term, budget-backed framework that connects procurement, organizational reform and industrial renewal into a single strategy, reinforced by subsequent white papers and the 2021 National Military Strategy.

### **Origins and Objectives**

The rationale behind Zrínyi 2026 lay in the recognition that Hungary's armed forces had become structurally weakened after decades of under-investment, a process marked by the erosion of combat readiness, the downsizing of personnel and the neglect of reserves. Analysts at both national and European levels point out that the parallel decline of the domestic defense industry—left fragmented and dependent after the Cold War—further undermined sustainability and strategic autonomy. The program was, therefore, conceived to remedy these cumulative deficiencies by setting concrete force-development targets<sup>43</sup> and by re-embedding the military at the center of national security policy.<sup>44</sup>

These aims reflected a broader ambition: to build armed forces that can simultaneously safeguard national sovereignty and serve as credible contributors to allied operations. The 2021 National Military Strategy confirmed this

orientation, presenting defense transformation as modular, resource-conscious and embedded in a wider framework of national resilience and alliance cooperation. It emphasized credible deterrence through the combination of national capabilities and NATO partnerships and outlined Hungary's aspiration to play a central role in Central and Eastern European defense cooperation—not necessarily by fielding the largest force, but by acting as a key regional hub for multinational efforts.<sup>45</sup>

### **Key Elements of Modernization**

Procurement is the most visible component of Zrínyi 2026. Hungary signed contracts for 44 Leopard 2A7+ main battle tanks and 24 PzH 2000 howitzers from Germany, reintroducing heavy armor as a central element of its land forces.<sup>46</sup> The air force modernization has included the extension of the Gripen fighter lease and investments in advanced training and air defense systems. Equally important, the program prioritized combat engineering, chemical defense and reconnaissance, areas long neglected but essential for modern operations.<sup>47</sup> The structure of the Hungarian Defense Forces was also reshaped from a small and expeditionary force into three brigades—heavy, medium, and light—later expanded to four to increase operational flexibility.<sup>48</sup> This restructuring reflected both NATO planning requirements and lessons from the Russo-Ukrainian War, which highlighted the enduring value of mechanization and depth in high-intensity warfare.

### **Industrial Base and Regulatory Frameworks**

A distinctive feature of Zrínyi 2026 is its emphasis on the revival of Hungary's defense industry. The program deliberately avoided reliance on foreign procurement alone by fostering joint ventures with major firms. These include Rheinmetall's Lynx infantry fighting vehicle plant in Zalaegerszeg, Airbus Helicopters Hungary in Gyula, collaborations with Dynamit Nobel Defense and Uvision for anti-tank and drone systems, and Colt CZ Group for small arms.<sup>49</sup> Such projects were rationalized as essential elements of strategic resilience: without a functioning domestic industrial base, Hungary would remain vulnerable to external supply disruptions and unable to sustain operations in wartime. Legal reforms have complemented industrial development. Effective crisis management requires a modern legal framework that reduces administrative obstacles and enables the coordinated mobilization of civilian and military resources. This focus on the domestic defense industry was also consistent with NATO's emphasis on strengthening European defense production and its resilience.<sup>50</sup>

## Strategic Culture and Validation

The significance of Zrínyi 2026 for strategic culture lies in its reversal of long-standing complacency. Hungarian strategic culture had long assumed that NATO membership would substitute for national defense.<sup>51</sup> The program challenged this mentality by redefining defense as a central element of sovereignty and credibility within NATO. The 2020 National Security Strategy underscored hybrid warfare, migration and renewed great power rivalry as primary threats. The 2021 National Military Strategy consolidated this perspective, tying the modernization program directly to Hungary's regional role.<sup>52</sup>

Events in Ukraine validated these choices. The Russo-Ukrainian War demonstrated the continuing importance of armor, layered air defense and mass reserves. New trends emerged there as well, like the disruptive role of drones and artificial intelligence. Such lessons confirmed that the HDF could not rely on small, professional formations alone. Facing the new defense trends of the future needs broader societal mobilization and technological adaptation.<sup>53</sup>

## NATO Interoperability and Domestic Industry

Hungary's rearmament cannot be understood without situating it within NATO's broader strategic framework. Since accession in 1999, the Alliance has provided both the environment and the benchmarks that shape procurement, doctrine and training. Yet Hungary has had to reconcile modest resources and a fragmented strategic culture with the demanding standards of interoperability and collective defense. Even after the adoption of the first National Military Strategy in 2009 and its update in 2012, defense remained politically marginalized and military affairs were consistently relegated to the lower end of priorities.<sup>54</sup> This reliance on NATO guarantees delayed the development of autonomous capabilities. By contrast, the 2021 National Military Strategy raised the level of ambition by setting out the goal of transforming the Hungarian Defense Forces into a modern, sustainable, flexible and effective force with balanced structure and high combat effectiveness, while ensuring full NATO compatibility in command, logistics and major systems.

## Alliance Standards and Force Development

These commitments gained urgency as NATO reinforced its eastern flank. Hungary's contributions include participation in the NATO Force Structure, rotational deployments and regional air policing in Slovakia and Slovenia. Such measures are not only expressions of allied solidarity but also instru-

ments of safeguarding national sovereignty through credibility within the Alliance.<sup>55</sup> The *Zrínyi 2026 Defense and Military Development Program* translated these obligations into concrete force development. Rather than ad hoc procurement, the program aligned Hungary's modernization directly with NATO capability planning,<sup>56</sup> from heavy armor and brigade restructuring to layered air defense. These steps ensured that national investments strengthened both territorial defense and alliance interoperability, reflecting lessons drawn from the Russo-Ukrainian war.<sup>57</sup>

Equally significant has been the evolution of doctrine. Whereas earlier strategies assumed that NATO membership would shield Hungary from direct threats, the escalation of the Russo-Ukrainian war demonstrated the return of high-intensity conventional conflict to Europe. This shock reinforced the imperative to strengthen deterrence and territorial defense. The 2020 National Security Strategy explicitly identified Russian aggression as a systemic challenge, demanding national as well as allied-level responses. In this sense, Hungary's growing alignment with NATO was not only a matter of external obligation but also a redefinition of sovereignty: credible contribution to the Alliance became inseparable from the credibility of national defense itself.

## Industrial Regulations and Strategic Trade-Offs

Interoperability cannot, however, be sustained without a viable supply base. Hungary's defense industry, long dismantled by Trianon, Soviet centralization and post-1990 transition, was reactivated under Zrínyi 2026. Experts noted that despite Hungary's world-class scientific talent and manufacturing capability, the lack of an indigenous aerospace sector and weak research and development frameworks limited Hungary's strategic sovereignty.<sup>58</sup> To address this, the government turned to foreign-led joint ventures—such as Rheinmetall's Lynx facility in Zalaegerszeg and Airbus Helicopters Hungary in Gyula—seen as essential for strategic resilience: shortening supply chains, ensuring spare-parts availability and enabling operational continuity in crises. Beyond procurement, regulatory reforms have further sought to integrate civilian industry into defense production and harmonize procedures with NATO standards, anchoring the industrial revival within a broader framework of national resilience. The *Defense Industrial Strategy* embedded in Zrínyi 2026 was more than sectoral planning: it sought to create a modern ecosystem capable of integrating technology, capital, manpower and innovation into both national and European value chains, thereby contributing to the European Defense Technological and Industrial Base.<sup>59</sup>

The revival of the industrial base has been reinforced by regulatory reform. Effective mobilization requires a modern legal framework for requisition, coordination and the prioritization of resources. Their analysis underlines that reforms since 2020 have sought to integrate civilian industry into defense production and harmonize procedures with NATO procurement standards.<sup>60</sup> This institutionalization of resilience reflects a whole-of-government approach, linking technology, industry and governance into a single framework.

Still, significant trade-offs remain. Heavy reliance on foreign-led ventures risks technological dependence and highlights structural gaps, such as the lack of an aerospace sector. Fiscal sustainability compounds these vulnerabilities: although Hungary has pledged to sustain defense spending above 2% of GDP, ambitious procurement targets strain the national budget and may encounter domestic political resistance.<sup>61</sup> An overemphasis on NATO interoperability could divert resources from uniquely national priorities, such as border protection and civil assistance during migration crises.<sup>62</sup> These dilemmas underscore that Hungary's long-term trajectory depends on balancing integration with autonomy, not to mention NATO's latest 5% benchmark, which further raises expectations.

The broader lesson is that interoperability and sovereignty are not mutually exclusive, but their relationship is contingent. NATO's demanding standards have pushed Hungary toward deeper modernization than any domestic policy alone would likely have achieved. At the same time, the revival of a domestic industrial base and the institutionalization of mobilization frameworks reflect a national desire to ensure that allied commitments do not substitute for sovereign capability. Whether this balance can be sustained will depend on Hungary's ability to reconcile fiscal limits, industrial dependencies and evolving alliance expectations. In this respect, Hungary's case exemplifies the dilemmas of medium powers on NATO's eastern flank: compelled to integrate, yet determined to preserve space for national agency.

### **Shift in Strategic Culture and Perception of Threat: From Passive to Active Posture**

For much of the post-1989 period, Hungary's strategic culture was defined more by absence than by presence. Military security consistently ranked low among political and societal priorities and NATO membership was widely interpreted as a substitute for national defense rather than as a framework requiring sustained investment. This orientation, often described as "passive" or "consumerist," relegated the armed forces to a residual function while privileging

economic and social policy as the main sources of security. Over the past decade, however, and especially since the onset of the Russo-Ukrainian War in 2014 and its escalation in 2022, Hungary's strategic culture has undergone a profound reorientation. A once passive, risk-averse posture is being replaced by a more proactive, "active" approach that frames military power as an indispensable element of sovereignty, alliance credibility and regional stability.

### **Legacy of a Passive Strategic Culture**

The roots of Hungary's passive orientation are well documented. In 2012 the country lacked a mature strategic culture: defense was not part of public discourse, and military affairs were consistently marginalized compared to economic modernization and EU integration.<sup>63</sup> The 2012 National Military Strategy echoed this mentality, framing Hungary's role in terms of limited expeditionary contributions to NATO and EU missions while assuming that collective defense obligations would never materialize on European soil.<sup>64</sup>

This posture rested on two assumptions: that Europe had entered a "post-conflict" era and that NATO membership provided sufficient security guarantees. These beliefs fostered complacency, leading to cuts in defense budgets, the abolition of conscription and the neglect of the defense industry.<sup>65</sup> The result was "deep disarmament," leaving the HDF hollowed out and reliant on allies for even basic capabilities.<sup>66</sup>

### **Emergence of Threat Perception**

The erosion of this passive outlook began in the 2010s. The 2015 migration crisis was a turning point, when the HDF was mobilized to reinforce border security. This marked the return of the military into domestic public life, underscoring that armed forces were necessary not only abroad but also within national territory.<sup>67</sup>

The more decisive rupture came with the escalation of geopolitical tensions in Eastern Europe. The events in Crimea in 2014 and subsequent developments in Ukraine marked a fundamental shift in the regional security environment and challenged the post-Cold War assumption of stable European borders. The 2020 National Security Strategy reflected this changed security landscape by identifying great power competition as a systemic challenge and calling for strengthening national deterrence capabilities. The further escalation of the conflict in 2022 further reinforced this perception, demonstrating the return of high-intensity conventional warfare to Europe. At the same time the Ministry of Defense's strategic foresight process in



2013–2014 correctly identified the possibility of a more confrontational Russian foreign policy and the potential of a migration crisis, but it misjudged the timing and its conclusions were not taken seriously enough.<sup>68</sup>

### **The Turn to an Active Posture**

This cultural reorientation was codified in strategic documents. The 2021 National Military Strategy embodied this shift, linking modernization efforts with a broader recognition that security must be actively produced rather than passively assumed. The formulation reflected not just ambition, but a concrete cultural shift. Over-reliance on external security guarantees was shifted to recognition that security must be actively produced on a national basis.

Hungary's NATO commitments also reflect this change. Whereas earlier deployments were often symbolic, recent years have seen Budapest take on more demanding roles, including battle-group leadership, air policing in Slovakia and Slovenia, and procurement of heavy armor aligned with NATO capability goals.<sup>69</sup> These steps indicate a desire to be recognized as a contributor rather than a free-rider. Despite political disputes, Hungary's military modernization, defense industrial development and participation in NATO/EU missions are fully consistent with regional and European security trends.<sup>70</sup>

Equally significant is the expansion of the HDF's domestic remit. Wartime mobilization requires a modern framework for requisition, coordination and resource prioritization, enabling the armed forces to operate in peer-to-peer conflict environments, and also in hybrid and non-military crises such as cyberattacks and pandemics.<sup>71</sup> This illustrates an "active" conception of security, embedding the military within national resilience structures rather than reserving it for exceptional contingencies.

### **The Transformation of Strategic Culture**

The shift from passive to active posture can be identified through four interrelated elements. The first is the re-emphasis of territorial defense. The Zrínyi 2026 program and the 2021 NMS prioritized territorial defense, reversing the expeditionary orientation of earlier decades. Heavy armor and artillery acquisitions reflect a renewed emphasis on deterrence.<sup>72</sup> Second, with territorial defense comes societal engagement. The expansion of reserves to 20,000 personnel integrates society into defense, contrasting with the disengagement symbolized by conscription's abolition.<sup>73</sup> Third, expanding the armed forces brings with it domestic industrial development. Defense industry development is framed as national resilience. Partnerships with Rheinmetall, Airbus and others highlight the renewed strategic importance of industrial capacity.<sup>74</sup> Fourth, new capabilities bring doctrinal innovation as well. The HDF's self-definition as a "learning organization" institutionalizes continuous adaptation, breaking with past rigidity and embedding transformation as an ongoing process.<sup>75</sup>

### **Conclusion**

Hungary's strategic culture has shifted from passive reliance on NATO guarantees to a more active conception of security centred on deterrence, resilience and alliance credibility. This transformation has been driven by external shocks—the migration crisis, the Russia-Ukraine conflict and the erosion of the post-Cold War order—combined with internal reforms centered on the Zrínyi 2026 program. This brought with it the revival of the domestic defense industry, while regulatory frameworks were modernized as well. Whether this marks a lasting cultural shift or a temporary response to acute threats remains uncertain. What is clear is that Hungary today stands closer to the "active" pole of strategic posture than at any point since 1989.



*Hungarian special military units during an Urban Warfare Exercise, Nagyatad.  
(Shutterstock/GTS Productions).*





## Long-Term Hungarian Military Modernization Patterns and the Role of Bilateral Partnerships

Patterns of modernization might be traced through societal-level access to technology: the development and durability of new, “rational” organizational forms of public and private life, the extent of which shows how the “Machine” of Fukuyama functions. It can be argued, though, that this modernity can be traced through relatively mundane things and objects as well, such as, are there paved roads or secular public schools in a given settlement, and how well are they functioning. This chapter outlines the pattern of modernity emerging through a set of mundane objects, that of transport planes. This is the pattern of the changes of air transport in Hungarian defense forces up to today, which is now embarking on a new chapter with the recent rearmament program.

The history of air transportation is a relatively easy narrative for measuring modernity, given that it is fairly recent and its starting point can be discovered easily. While it can be argued that air transport fits into the much longer history of military logistics, supply lines or even maneuvering warfare in the case of airborne regiments, getting airborne is an important dividing line between stages of industrial and economic capability or sophistication.

What is more, observing the patterns of modernity in Hungarian military airlift capabilities offers us a window into the global structures in which Hungary positions itself. Air vehicles are highly sophisticated and thus strongly connected to access to centers of industrialization. In the case of such a small country, the rationalization of modernity means that these sophisticated machines can hardly be manufactured strictly on a national scale. Either they are imported or, if manufactured locally, they need markets that supersede the reach of small nation states in Central Europe.

The Hungarian history of military air transport follows the changes of the geopolitical position and thus military disposition of the small country. The first air transport units were formed at the advent of the Second World War, a couple of years after major Western powers formed their air supply and airborne units. This was a development of Hungary breaking arms limitations regulations, applied so strictly by Western powers after the First World War. As in other high-technology fields, building up a Hungarian air transportation wing had a function of at least getting a demonstrative “token” capability in a field that was reserved for the most developed militaries, while building up a capability that could potentially be useful for scaling up if

needed. This was a function of a small nation-state military, looking after its own critically important defense and military tasks related to peer-level conflicts with other neighboring states, like Romania.

The technology to enable this came from the most important interwar partner of the Hungarian military, a source of most high-technology tools: Fascist Italy. When a major expansion of the Royal Hungarian Armed Forces was approved in 1938, products of the Northern Italian industries, Caproni and Savoia-Marchetti planes, formed the backbone of Hungarian air transport. These were the ones that served in the Second World War when it was needed—given the course of the war, they were used less in daring air offensives, but rather for filling the gaps when supplies were critically needed in the vast operations of the Eastern Front, where the Hungarians operated against the Red Army.<sup>76</sup>

After the war, Hungarian strategic capabilities, and consequently the armed forces themselves, were closely integrated into Warsaw Pact forces. Air transport, supply and airborne capabilities were again important, but not on a large scale. In due course, the first planes of the Soviet-vassal Hungarian People's Army came from Soviet and American factories—basically Soviet copies called “Li-2” of the venerable American-made C-47 of Second World War vintage, one of the tools that was mass-produced by “freedom's forge”, the American war industry, and then duly copied by the Soviets alongside other equipment like trucks or strategic bombers, to at least modestly catch up with the West in technology. With the change of guard, tools of Soviet modernity came in place of the Italian machines, the fruits of an interwar alliance.

The next stage was getting proper Soviet tools, after the USSR started to produce high-technology equipment by itself that was at least close to the West. This meant the arrival of the first helicopters, all Soviet made Mil and then Kamov types, and Ilyushin and Antonov planes from Soviet factories. The fact that they arrived so late showed that the Hungarian army was truly just a second-rate auxiliary of the Soviet Army itself, and that Soviet production capabilities were quite constrained. By the time the Second World War vintage planes were fully replaced, the world's skies were full of commercial jets.

The concept for the Hungarian air transport arm transformed beyond that of a small nation-state air force: not

only did it need to provide tools of air mobility for a modestly sized airborne infantry force, but also needed to participate in the power projection of the Warsaw Pact across the globe. The Soviets were anxious to show their capacity to reach across the globe like the Americans had with ease since the Second World War. In applicable crisis situations they were eager to show their mettle via deploying their transportation fleet. Sometimes the tasks were too big, such as after the 1973 Yom Kippur war, when Hungary supplied a dozen MiG-21s to Syria. These needed to be shipped by the hulking An-12 cargo planes of the Soviets, which had the capacity to carry whole air-frames.<sup>77</sup>

This stage carries us forward into the post-Cold War era. The description of the prologue's "Great Disarmament" serves us well here. Like other former Warsaw Pact forces, Hungary did not replace its Soviet-era hardware rapidly. There were two opposing tendencies: one to downsize forces, the other to do so while still getting up to NATO-standards so that coveted entry into the alliance could happen. While the air force scrambled to service and keep operational their Soviet birds, the planners gave newer and newer tasks to the air force. After 9/11, globalization knocked on the door again. Now it was not for showing off Soviet Bloc capabilities, but serving the new, global tasks of the Global War on Terror and NATO force projection into other areas of the globe.

This meant first the comprehensive overhaul of the extant four An-26s, and eventually, a modest addition with the purchase of a single extra An-26 from Ukraine. Yet dependency on the Soviet-era hardware remained. The need and the financial capability to cross the threshold of a new upgrade was lagging behind. By 2009, only three out of the five were constantly operational, while the Afghanistan and operations in Iraq strained air-frames and personnel.<sup>78</sup> The new global role was duly carried out, but the gap between geopolitical commitments and the level of modernization remained.

The move for an upgrade finally happened in the late 2010s. As military budgets slowly ramped up in the aftermath of 2014, Hungary finally moved to purchase new platforms in the framework of the Zrínyi 2026 Force Development Program. The An-26s were finally retired in 2020—by that time, only one flyable copy remained.<sup>79</sup> Hungary in the neoliberal age squeezed out the last drop from the investments of the previous world system.

This is where the patterns of the present emerge. In the interwar period, Hungary sought a partner against the established European order. In the Cold War, our Socialist regime served its master duly. In the neoliberal era, Soviet hardware was kept until the last possible moment so the

exorbitant investments of socialism would serve their returns. This transition and the growing paradoxes all reflected in one of the sophisticated systems of the army, the transport planes.

What do these developments show now? Fundamentally, the appearance of systems from suppliers never tapped before, which are outside the closest alliances. Still, the Brazilian Republic is not far from traditional geopolitical circles. In contrast to other choices, like the Paks 2 nuclear power plant, Brazil does not have direct conflicts of interest with the Europeans—though geopolitical views do differ to an extent.<sup>80</sup> The deal indicates how multipolarity affects mundane decisions as well. In the 2020s, not only traditional Western industrial centers can offer high-technology platforms for European militaries. The deal shows Hungary's willingness to take practical steps according to its "Global Opening" strategy formulated in 2011. In turn, following the path to new suppliers has rippling effects and redraws the mental map of Hungarian policymakers about where sources of new technology can be expected and which can enhance cooperation beyond sole deals.

The KC 390 now has extensive orders across NATO, but when the Hungarians signed the deal for two planes, only one country, Portugal, a traditional Brazilian partner, had contracts for purchasing planes.<sup>81</sup> This willingness to be the "icebreaker" is shown by its relations with other BRICS countries, which are beyond the scope of this article. As an important lesson, it can be highlighted here that even the mostly critical Hungarian media recognized, for example, that pushing through the Chinese-funded Budapest-Belgrade railway despite much criticism was meant to be a demonstration that Hungary is among the front ranks of European countries seeking investment and cooperation from the BRICS. In 2025, Hungary will be the biggest recipient of Chinese FDI in Europe. The bold step to be among the first buyers of a plane without extensive operational prowess can be seen in a similar vein. In the latest iteration of the reported Military Balance, the KC-390 was singled out as the single biggest asset that shows the diversification of suppliers of European countries in the new era of rising military spending.<sup>82</sup>

Buying Brazilian platforms proves, too, that economic cooperation does not need to be impacted by political disagreements. The first KC-390 was delivered to Hungary less than two months after the New York Times broke the news that the former president Jair Bolsonaro, who is riddled with legal challenges, spent two nights in the Hungarian Embassy in Brasília,<sup>83</sup> demonstrative of the amicable ties that Hungary has with conservative movements of the Latin American continent. The affair caused

temporary tension between the two countries. The aviation business, however, throughout the past one and half years, looks unaffected by these developments.

At the same time, traditional suppliers remain. Airbus, a giant of the global oligopoly on commercial planes, supplied the duo of the A319 planes. This also reflects how civilian, off-the-shelf solutions can offer capability to militaries in the 21st century on quite complex fields. The opportunity to purchase the Hungarian planes was offered by the sale of the fleet of the Air Berlin airline.<sup>84</sup> These new planes are originally budget civilian planes, while fitted out with equipment suitable for their military role.

Off-the-shelf means trade-offs, obviously. These western planes lack the heavy intake capability of the KC-390—no cargo ramps at the tail, much narrower body, given that it is literally an airliner—but still important additions. These Airbuses are already used in expeditionary operations that reflect the global tasks of the Hungarian Armed Forces in the 2020s. In August 2021, the pair of Hungarian A319s participated in the Kabul evacuation of the Western powers, when the Taliban took over. A similar operation code-named

“Desert Caravan” was carried out by them in Sudan in the spring of 2023.<sup>85</sup> By 2025, the Hungarian Defense Forces ramped up its counter-terrorist presence in the Sahel region as well, and this year, the A319 planes appeared in Chad to transport local soldiers to the “Flintlock” exercise in the Ivory Coast.<sup>86</sup> The global tasks and the concentration of asymmetric warfare thus apparently remained, but for the time being, the technological capabilities look by and large on par with the allocated tasks of the small military of the country.

Hungary's military modernization, if seen through the story of the airlift capabilities, came from a small nation playing catch-up to the world standards into the 21st century. New suppliers and off-the-shelf capabilities dominated this iteration of modernization, which contributed to the construction of new paths of technology sourcing. The future of these projects will be shaped by how Hungary handles its global commitments and how it will navigate a world where NATO's defense spending increases greatly. In the following essay, another example of rearmament's effects on bilateral relations and Hungary's industrial concepts will be presented.





*Organization of Turkic States building, Istanbul. (Shutterstock/Marius Karp).*



## Current Trends and Emerging Opportunities in the Hungarian-Turkic Defense Cooperation

One of the most important dimensions of Hungary's cooperation with the Turkic world lies in military development, where Türkiye plays a leading role. As the second-largest military power within the NATO alliance, Türkiye serves not only as Hungary's primary defense partner in the Turkic world but also as one of its most significant global partners. As Hungary's relations with Turkic countries continue to expand, however, new areas of military cooperation are also emerging with Azerbaijan and Uzbekistan. Hungary's close ties with both Türkiye and the broader Turkic world are expected to play an important role in Europe's rearmament process, as Budapest enjoys a high level of trust from both Western and Turkic partners.

### Hungarian-Turkish Defense Cooperation

Hungary's military partnership with Türkiye is among its strongest. Following the elevation of bilateral relations to a "priority strategic partnership"<sup>87</sup> in 2023, defense cooperation has expanded beyond procurement to include defense technology innovation and joint exercises. Both countries share a vested interest in the stability of the Western Balkans, counter-terrorism, and managing migration flows to Europe—all of which remain central to their cooperation agenda. For Hungary, this partnership offers valuable opportunities in defense innovation, training and procurement. Türkiye's success in combating terrorist groups such as the PKK and YPG, its pivotal role in addressing Europe's migration challenges and its strong record of military innovation make it a particularly important partner for Budapest.

During Hungarian Defense Minister Kristóf Szalay-Bobrovniczky's<sup>88</sup> visit to Türkiye on 4 February 2025, he met with Turkish Defense Minister Yaşar Güler to discuss expanding cooperation. The two sides agreed to establish a multi-year partnership between Hungary's Defense Innovation Research Institute (VIKI) and Türkiye's TÜBİTAK SAGE, focusing on joint defense research, as well as educational and training programs. Türkiye has already contributed to the modernization of Hungary's defense capabilities and this new agreement will further deepen cooperation in technology development and regular strategic dialogue.

In the same meeting, Mr Szalay-Bobrovniczky emphasized that Hungary and Türkiye jointly contribute to stability in the Western Balkans through their participation in NATO's mission in Kosovo and the EU's mission in Bosnia and

Herzegovina, while Türkiye's counter-terrorism efforts make a significant contribution to Europe's overall security.

As mentioned earlier, procurement of military vehicles and improvement of the Hungarian defense capabilities remain as of the strongest vectors of Hungarian-Turkish cooperation. One successful example is the integration of Gidrán combat vehicles into Hungarian defense infrastructure.<sup>89</sup> Given their success, in early 2025, fifty-six Gidrán combat vehicles, manufactured by Nurol Makina, were imported from Türkiye to improve the Hungarian Defense Forces' land and special operations capabilities. Along with them additional electronic, communication, radar and weapon systems are integrated into the vehicles in Hungary. Given the rearmament process in the whole continent, such procurement dynamics are the increasing trend.

### New Defense Cooperation Frameworks

The strategic vision of Hungary emphasizes the importance of ensuring stability in the regions surrounding the European continent as a prerequisite for broader stability within Europe and the European Union. Consequently, one of the key priorities of Hungary's military cooperation with the Turkic states is to contribute to the security and stability of these neighboring regions. Another important factor driving such cooperation is the growing military innovation of the Turkic states. Therefore, Hungary also seeks to develop joint technological advancements through these partnerships.

In the South Caucasus, Azerbaijan stands out as Hungary's primary partner in the military sphere, among other areas of cooperation. Azerbaijan is the only country in modern history to have fully restored its sovereignty over all its territories, ending a "status quo" that persisted for more than three decades. This victory was a crucial step toward initiating the peace process and fostering stability in the South Caucasus. Moreover, it demonstrated Azerbaijan's strong military innovation and operational capabilities. Reflecting this recognition, in 2023, during the meeting between the Hungarian Minister of Defense and Colonel General Zakir Hasanov, the Minister of Defense of Azerbaijan, the decision was made to open a Hungarian military attaché office in Baku. Later, on 6 May 2025, during the visit of the Chief of the General Staff of the Hungarian Defense Forces, General Gábor Böröndi, to Baku,<sup>90</sup> both sides agreed to intensify the exchange of

expertise and conduct joint exercises aimed at enhancing the professionalism of their armed forces.<sup>91</sup>

Central Asia also represents a region of high strategic importance for Hungary, given its growing role in enhancing Europe's global competitiveness and the robust cooperation already established with the Central Asian states. A milestone in these relations was reached in April 2025, when the Hungarian Minister of Defense visited Uzbekistan to meet his counterpart, Major General Shuxrat G'ayratjonovich Xolmuhamedov.<sup>92</sup> During the visit, Hungary and Uzbekistan signed a landmark agreement on defense cooperation.

Although indirectly related, another development that is expected to strengthen Hungary's defense capabilities is the recent signing of a Memorandum of Understanding between Hungary's 4iG Space and Defense Technologies<sup>93</sup> and Kazakhstan's national space agency. Central Asian security is of vital importance to Hungary's strategic interests and this expanding defense cooperation promises to drive further innovation and technological development in the coming years.

### **New Trends and Opportunities**

With the re-election of Donald Trump as President of the United States and his firm stance on NATO allies' military spending, combined with the continuation of the Russo-Ukrainian war for more than three years, Europe's security landscape has once again come into sharp focus. A growing number of EU member states have begun to significantly increase their military expenditures in an effort to reach NATO's target of allocating 5% of GDP to defense spending.

A notable example is Germany, where Chancellor Friedrich Merz has announced plans to spend nearly €650 billion<sup>94</sup> over the next five years—more than double the country's current defense budget. On the eve of Bastille Day, French President Emmanuel Macron declared an additional €6.5 billion<sup>95</sup> in military spending over the next two years. Meanwhile, Poland announced that its defense spending is expected to reach 4.7% of GDP in 2025.<sup>96</sup>

At the Bálványos Summer Free University<sup>97</sup> in Tusnádfürdő, Hungarian Prime Minister Viktor Orbán outlined five pillars of Hungary's strategy for ensuring prosperity and avoiding involvement in global conflicts. For our purposes here, the second pillar is especially interesting: Orbán emphasized national defense, highlighting the ongoing reform and modernization of Hungary's armed forces and the progress of military investments.

In this context, the efforts of European leaders have extended beyond national policies to the broader European Union agenda. In April 2025, the EU introduced the "ReArm Europe Plan / Readiness 2030", envisioning €800 billion in defense spending<sup>98</sup> through greater fiscal flexibility at the national level. The plan also includes a new €150 billion loan instrument (SAFE) for joint procurement, the possible redirection of cohesion funds and expanded support from the European Investment Bank. It is important to recognize that, as a supranational entity, the EU does not possess a unified defense policy. Hence, national defense remains a matter of sovereignty for individual member states. Achieving the €800 billion target will, therefore, depend heavily on national strategies and bilateral agreements both within and beyond the Union.

One of the EU's key partners in this rearmament process is expected to be Türkiye, given its successful track record in counter-terrorism operations and external missions. Türkiye's achievements in defense technology, most notably its Bayraktar drones, which proved decisive in several conflicts including Azerbaijan's victory in the Karabakh war, have drawn significant international attention. Moreover, Türkiye's new KAAN fighter jet<sup>99</sup> represents another milestone in its expanding defense industry, with Spain reportedly considering acquisition.<sup>100</sup>

It is increasingly evident that Türkiye is poised to become a major arms supplier to the European market. To facilitate such cooperation, Hungary and Türkiye could establish joint defense production initiatives, leveraging their mutual trust and strategic ties. Given Hungary's respected position both within the Turkic world and among its Western partners, these Hungarian–Turkish joint ventures could play a pivotal role in developing a new generation of defense technologies, ultimately strengthening Europe's security architecture under the "ReArm Europe" framework.

## Conclusion

**H**ungarian armament purchases now reflect the shifting field of the global armament trade and industry. The old Soviet platforms served for a long time, given the enormous amounts of over-investment that were put into them before 1989. There was logic in disarming: the global Zeitgeist was a half-conscious truce among great powers to decrease defense spending and focus their budget on economic development. This logic has changed and it has caused Hungary to shift stance, too. When the security situation changed for the worse in 2014, Hungary followed its allies to rearm. It changed not only the army, but doctrine as well: the idea of Hungary as a nation capable of its own defense developed in those years and was conceptualized in Defense white papers.

New patterns of modernization and industrial cooperation appeared, redrawing the relationship of Hungary to development. There are off-the-shelf purchases, like the A319's, and while German industrial investment plays a major part, new suppliers emerge beyond NATO, like Brazil or the Turkic world. Rearming the West means recovering a lot of outsourced industrial potential. Illustrative is the story of the

US trying to relaunch its maritime industry with the expertise and money of Korean firms.<sup>101</sup> In this field, Hungary is a key actor. It was the first country to build lasting partnerships with Turkish defense companies, strengthening European ties with a major industrial power. It was also among the first to sign up to buy new Brazilian technology. Its willingness to take risks and build on new platforms is sometimes seen

As one of the most important relationships of the country outside of the European sphere, Hungary's deepening bilateral defense cooperation with Türkiye and the broader Turkic world reflects a strategic convergence of technological innovation, regional stability and shared security priorities. As Europe accelerates its rearmament under the "ReArm Europe" framework, Hungary's unique position as a trusted partner between the West and the Turkic states offers new opportunities for joint defense production and innovation. These partnerships not only enhance Hungary's own defense capabilities but also contribute to the broader goal of strengthening Europe's collective security architecture.



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