

POLICY REPORT

MANAGED  
PRAGMATISM  
EU-TÜRKİYE RELATIONS  
WITHOUT A SHARED VISION:  
INSIGHTS FROM BRUSSELS

RICCARDO GASCO  
SEREN SELVİN KORKMAZ  
DR. EDGAR ŞAR

DECEMBER 2025-002



Funded by  
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Social  
Sciences  
4 Democracy



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# EXECUTIVE SUMMARY

EU–Türkiye relations are entering a new phase defined by constrained pragmatism rather than political ambition. Russia’s war in Ukraine, instability across the Middle East, and the uncertainty surrounding Donald Trump’s return to the White House have shifted Europe’s priorities sharply toward security, migration management, and strategic resilience. Against this backdrop, the European Commission’s Türkiye 2025 Report and IstanPol’s fieldwork in Brussels (September 2025) reveal a relationship sustained by necessity, yet lacking a shared strategic horizon.

Interviews with EU policymakers, diplomats, analysts, and civil-society representatives in Brussels point to a broad but quiet consensus: cooperation with Türkiye is indispensable, particularly in security, energy, trade, and migration, but democratic backsliding has hollowed out the accession framework and removed the normative anchor that once guided engagement. Fragmentation within the EU—among the Commission, EEAS, European Parliament, and key member states—further complicates policy coherence, while the Cyprus dispute continues to block high-level political and defence-industrial tracks. What remains is a transactional mode of cooperation shaped by “interdependence without integration.”

Nevertheless, avenues for calibrated progress exist. Brussels continues to regard Türkiye as a pivotal regional actor—central to Black Sea security, NATO deterrence, Syria and Gaza diplomacy, and mediation with Russia—making a complete political disengagement unlikely. Economic and technological domains, such as Customs Union modernization, energy diversification, digital alignment, and reconstruction partnerships, offer realistic opportunities for functional re-engagement if sequenced strategically.

The policy implications are two-sided. For the EU, a more coherent approach is needed—recognizing the

strategic cost of exclusion, prioritizing Customs Union reform, and applying conditionality in a phased and realistic manner. For Türkiye, even modest steps to halt democratic erosion, improve rule-of-law compliance, and build confidence on Cyprus would have a disproportionate impact on political dialogue and trust. Both sides would benefit from rebuilding institutional and societal channels through low-politics cooperation in energy, reconstruction, academic exchange, and civil-society dialogue.

The report concludes that the most plausible trajectory for 2025–2030 is “managed pragmatism”: functional cooperation where necessary, political distance where unavoidable. Alternative scenarios like strategic re-engagement or gradual decoupling remain possible but require significant domestic or geopolitical triggers. Below are the key findings that underpin this assessment:

- **The relationship is driven by strategic necessity rather than shared vision:** Security cooperation, migration management, and deep economic interdependence sustain engagement, yet no credible political horizon exists and the accession framework is substantively hollow.

- **Democratic backsliding has eroded the foundations for meaningful political dialogue:** The 2025 Commission Report identifies a pattern of entrenched democratic regression—rooted in the hyper-centralized presidential system, politicized judiciary, non-implementation of ECtHR and Constitutional Court rulings, shrinking civic space, and recurrent pressure on opposition actors. This erosion has eliminated the “positive political narrative” that once accompanied Türkiye’s candidacy, paralyzed the accession framework, and narrowed EU political engagement to a predominantly transactional sphere.
- **Brussels assesses domestic political actors primarily as indicators of institutional decay rather than drivers of imminent change:** Interviewees closely monitor the opposition—including CHP’s 2024 gains and the broader crackdown against the party, including the detention of Istanbul mayor Ekrem İmamoğlu—but largely as indicators of institutional decay rather than as drivers of imminent political change, given the structural limits imposed by selective prosecutions, uneven competition, and shrinking civic space. These dynamics shape expectations: while opposition parties are seen as credible interlocutors but many interlocutors doubt whether, under current conditions, they can by themselves substantially reshape EU–Türkiye relations or reactivating the accession framework.
- **Fragmentation across EU institutions and member states undermines coherence and produces uneven, sometimes contradictory policy signals:** Divergent priorities between the Commission, EEAS, European Parliament, and national capitals—some emphasizing strategic pragmatism and sectoral cooperation, others insisting on rule-of-law conditionality—result in inconsistent approaches to sanctions alignment, defense-industrial cooperation (including debates on Türkiye’s participation in SAFE), export controls, and migration management. Even when member states share similar diagnoses of democratic deterioration, they differ on instruments, pressure, and sequencing, reinforcing a shift toward functional engagement without a unified strategic or normative framework.
- **The Cyprus dispute remains the central structural obstacle:** Greek and Cypriot vetoes freeze progress on political dialogue, defense-industrial participation, and several technical files. Confidence-building steps on the island—such as technical cooperation or joint economic initiatives—are viewed as necessary for any strategic breakthrough.
- **Türkiye is viewed as strategically indispensable for Europe’s security architecture, and its exclusion from defence-industrial initiatives is increasingly seen as counterproductive:** Interviewees emphasized Ankara’s pivotal role in Black Sea security, the grain corridor, demining, NATO deterrence, and diplomacy in Syria, Gaza, and Russia—areas where cooperation is expected to continue regardless of political tensions. Against this backdrop, several interlocutors, particularly from Germany and Italy, warned that sidelining Türkiye from SAFE and related defence-industrial frameworks undermines Europe’s strategic depth and supply-chain resilience, suggesting differentiated integration as a pragmatic corrective.
- **Migration continues to anchor cooperation despite political strain:** The 2016 EU–Türkiye Statement remains central to Europe’s external migration architecture, reinforcing interdependence even as trust erodes.
- **Economic and technological cooperation offers the most realistic track for progress:** Modernizing the Customs Union, expanding energy cooperation, enabling digital alignment, and coordinating reconstruction efforts (notably in Ukraine) are seen as mutually beneficial domains where phased conditionality can work.
- **A deep trust deficit reinforces “managed pragmatism” as the most likely scenario for 2025–2030, limiting even pragmatic engagement and blocking structural alignment:** With communication channels thinning, political ownership weak on both sides, and high-level contact reduced to transactional exchanges, the relationship is set to remain locked in managed pragmatism. Cooperation will continue only in indispensable areas—security, migration, and trade—while any meaningful political reset will require renewed trust-building efforts, credible rule-of-law steps, and the expansion of low-politics platforms that can sustain engagement over time.

# INTRODUCTION

EU–Türkiye relations are unfolding in a profoundly altered international and domestic environment. The global and regional dynamics that once gave the relationship strategic coherence have largely dissipated. Russia’s full-scale invasion of Ukraine, the destabilizing effects of the conflicts in the Middle East, and the return of Donald Trump to the White House have intensified Europe’s security anxieties while shifting its political agenda decisively toward defense<sup>1</sup>, migration management, and strategic resilience. Within this new landscape, the European Commission’s Türkiye 2025 Report<sup>2</sup> offers a revealing snapshot of a relationship that is neither collapsing nor improving, only recalibrating itself around necessities.

For more than a decade, the EU–Türkiye relationship has been framed through a persistent tension: the EU sees Türkiye as strategically indispensable yet politically unaligned; Türkiye sees the EU as economically essential yet normatively intrusive. What emerges from this year’s report is an even sharper version of this duality. The two sides are moving closer in areas of hard interest, but further apart in the domains that once defined accession. The EU’s relationship with Türkiye is no longer governed by enlargement logic, the promise of convergence and democratic transformation. Instead, it is structured around interdependence without integration: a dense web of economic, security, and migration ties that cannot be undone, even as political distance widens.

This report examines the competing visions of Türkiye that shape policy thinking in Brussels. It is based on Istanbul’s fieldwork in Brussels between 9–18 September 2025, comprising semi-structured interviews with policymakers, diplomats, EU officials, analysts, and civil society representatives.

The analytical contribution of this study emerges along

three dimensions. First, the interviews reveal the existence of a ‘*silent consensus*’ in Brussels: although cooperation with Türkiye is seen as essential, particularly on security, trade, and regional stability, there is now no shared political vision for the future of the relationship. The accession framework remains formally intact but substantively hollow and high-level political dialogue is frozen. Second, the fieldwork uncovers the institutional fragmentation behind the EU’s Türkiye policy. The Commission, the European External Action Service, individual member states, and the European Parliament operate with markedly different risk perceptions and priorities. This divergence is rarely acknowledged publicly but shapes every aspect of engagement, from sanctions alignment to defense cooperation, from the Cyprus issue to migration. Third, the fieldwork documents Brussels’ recalibrated perceptions of both Türkiye’s domestic politics and its regional posture. Many interlocutors assess Türkiye through the prism of democratic backsliding, intensified by the 19 March 2025 arrest of Ekrem İmamoğlu, Istanbul’s mayor, while simultaneously recognizing Ankara as a critical actor in NATO, the Black Sea<sup>3</sup>, the Middle East<sup>4</sup>, and the South Caucasus<sup>5</sup>.

# DEMOCRATIC BACKSLIDING AND THE LIMITS OF POLITICAL ENGAGEMENT

Our interviews in Brussels revealed two distinct yet intersecting perspectives on Türkiye’s democratic trajectory and its relevance for the EU. On the one hand, experts and think-tankers who have followed Türkiye for many years argue that Türkiye no longer holds the political attraction it once did. They note that Türkiye-focused events and working groups in Brussels have become less frequent, and that the country’s democratic stagnation has eroded the “positive narrative” that previously underpinned the relationship.

On the other hand, interlocutors within EU institutions emphasize Türkiye’s continued strategic relevance. Although the democratic component of the relationship has weakened, Türkiye remains critical to Europe’s security architecture, migration governance, and management of regional instability. In line with the European Commission’s annual reports, which consistently use the term “democratic backsliding” to describe the long-standing and gradual erosion of Türkiye’s democratic quality and the intensification of authoritarian practices, this section focuses on the factors that have diminished the positive political narrative and assesses how this shift shapes the limits of EU–Türkiye engagement.

The de-democratization in Türkiye over the past decade has profoundly altered the nature of its engagement with the EU and effectively paralyzed accession negotiations since 2018. The European Commission’s Türkiye 2025 Report confirms a pattern of democratic regression by identifying interconnected dimensions of democratic decay in Türkiye: the erosion of democratic

standards, the undermining of the rule of law, and the systematic violation of fundamental rights.

The 2025 Report underlines that at the center of this democratic deterioration lies the hyper-centralized presidential system, which it argues has reshaped Türkiye’s political order in ways that extend far beyond ordinary institutional imbalance. According to the report, the concentration of power in the executive has progressively weakened horizontal accountability, the Parliament’s prerogatives, and the separation of powers. The report assesses that this reconfiguration has created a political arena in which competition formally exists but is substantively eroded. It further notes that opposition actors encounter sustained judicial pressure, recurrent investigations, and the removal or prosecution of elected mayors – practices the report interprets as restricting the possibility of meaningful contestation rather than merely disadvantaging rival parties.

The judiciary, meanwhile, is said to have undergone a profound transformation. Rather than serving as an in-

dependent arbiter, the report argues that it often operates in ways that align with executive preferences. The routine non-implementation of Constitutional Court decisions and ECHR judgments is described in the report as signaling not only institutional fragility but a systemic disregard for legal constraints. The report also highlights that civil society and media organizations continue to face administrative, legal, and regulatory pressure. These combined dynamics have created a constrained public sphere in which avenues for dissent remain formally open but materially narrow, contributing to the broader pattern of democratic regression identified by the Commission's assessments.

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The arrest of Istanbul's mayor, Ekrem İmamoğlu<sup>6</sup>, in March 2025, widely interpreted in Brussels as an emblematic act of political repression, reinforced perceptions that Türkiye has moved beyond the threshold of reversible democratic decline. Among European policymakers, there is a broad consensus that the deterioration of democratic standards has fundamentally changed the calculus of engagement. Some officials noted that the EU has "learned to live with" Türkiye's increasingly authoritarian trajectory, adopting a pragmatic approach that separates political criticism from functional cooperation. This decoupling has allowed dialogue to persist in areas such as trade, migration, and security, but it has also entrenched a model of engagement stripped of normative ambition, and the persistence of democratic erosion effectively rules out any

return to the more institutionalized, rules-based form of engagement that once characterized EU–Türkiye relations, confining the relationship to a predominantly transactional sphere.

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European capitals differ not only in how they interpret the depth and trajectory of Türkiye's democratic backsliding, but also in how they believe the EU should respond to it. Certain member states, particularly those with close economic and security ties to Türkiye, have adopted a more transactional outlook, prioritizing migration management and defense cooperation over broader political conditionality. Germany<sup>7</sup>, for instance, has even lobbied for Türkiye to be considered within the framework of SAFE, underscoring the strategic value it attaches to cooperation with Ankara. Yet others, especially across Northern and the rest of Western Europe, remain hesitant to deepen engagement in the absence of credible progress on the rule of law. The outcome is a fragmented European posture that vacillates between strategic pragmatism and normative caution, and this fragmentation manifests not only in discourse but also in policy practice.

Even when capitals share similar evaluations of democratic decline, they frequently diverge on the appropriate instruments, conditionality, and degree of political pressure to employ, producing uneven and at times contradictory approaches to engagement.

The 2025 Report also highlights areas where backsliding is most acute. Judicial independence is described as severely compromised, with courts selectively implementing Constitutional Court decisions and continuing to ignore binding ECHR judgments, most notably in the Kavala (prominent civil society figure) and Demirtaş (former co-chair of the pro-Kurdish People’s Democratic Party (HDP, predecessor of today’s DEM Party), cases<sup>8</sup>, which the report identifies as emblematic of systematic non-compliance with the Court’s rulings. According to the report, anti-terror legislation is routinely applied in ways inconsistent with the European Convention on Human Rights, often used to silence political opposition and civil society. It further notes a continued deterioration in freedom of expression: RTÜK’s (Radio and Television Supreme Council of Türkiye) fines are said to disproportionately target independent outlets, while the 2022 disinformation law and the new cybersecurity legislation are assessed as tightening control over the digital sphere. The report also points to the persistent human rights concerns, including ill-treatment, impunity among security forces, discrimination against LGBTQI+ persons, and weakened protections for gender equality following Türkiye’s withdrawal from the Istanbul Convention. Additionally, it underlines that high-level corruption cases are selectively pursued against opposition mayors, while similar allegations involving ruling party officials do not appear to be followed up on.

Many interlocutors admitted that Türkiye’s democratic decline is a part of a broader global crisis of liberal democracy<sup>9</sup>. Some policymakers argued that while Türkiye’s trajectory is alarming, it is not entirely exceptional in an international context marked by rising authoritarianism and weakening democratic institutions. This comparative framing, however, has had the paradoxical effect of lowering expectations, normalizing de-democratization as a structural feature rather than a temporary deviation.

Against this backdrop, the European Commission continues to frame its engagement with Türkiye through a dual-track approach: keeping the accession framework formally alive while prioritizing pragmatic cooperation in specific sectors. Yet, in the absence of political reform in Ankara, the accession process has lost credibility on both sides. The “enlargement fatigue” visible across EU institutions compounds the problem, leaving Türkiye in a grey zone—neither a candidate moving forward nor a neighbor fully integrated into the EU’s external governance structures.

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The result is a relationship where democratic backsliding limits the scope of political engagement but does not prevent cooperation in strategically vital areas. Türkiye’s diminished democratic outlook reduces the space for a renewed positive agenda, while Europe’s security needs ensure that functional cooperation continues. This tension defines the boundaries of what is currently possible and what remains structurally out of reach in EU–Türkiye political relations.

# BRUSSELS' VIEW OF DOMESTIC POLITICAL ACTORS AND THE BOUNDARIES OF POLITICAL CHANGE

The future of EU–Türkiye relations is also often discussed in Brussels through the lens of domestic political challenges. The Turkish opposition is viewed as a potential catalyst for renewal, yet it is also seen as a fragile and fragmented actor operating within a heavily constrained political environment. In the run-up to the 2023 elections, the opposition coalition (the Table of Six) briefly raised expectations in some European policy circles that a potential political transition could bring a recalibration in EU–Türkiye relations.

Delegations from Istanbul in Brussels, during the electoral period, were asked whether a change of government would alter core European priorities, such as migration management, the Cyprus question, or Türkiye's alignment with EU foreign and security policies. The main opposition Republican People's Party's (CHP) success in the 2024 local elections, becoming the country's largest party, momentarily revived this interest. However, Istanbul's observations during various Brussels fieldwork in 2025 indicate that this attention remained limited and has not yet generated an expectation of a sustained policy commitment. Despite periodic engagement, most interlocutors agreed that opposition actors have struggled above all to effectively communicate any consistent or forward-looking foreign policy vision they may hold.

The role and condition of opposition actors are viewed primarily as indicators of institutional and democratic deterioration rather than as drivers of imminent political change. EU institutions and policymakers acknowledge

that the opposition operates in a constrained environment marked by selective judicial action, uneven electoral conditions, and structural obstacles that limit meaningful political competition. These assessments reflect findings highlighted in the Türkiye 2025 Report, which documents a pattern of disproportionate investigations, prosecutions, and administrative measures targeting opposition parties – most notably CHP and People's Equality and Democracy Party (DEM Party) mayors – while comparable actions against ruling-party officials remain largely absent. For Brussels, this selective enforcement is seen not simply as domestic political maneuvering but as symptomatic of the erosion of rule-of-law safeguards.

The detention of Istanbul's mayor and CHP's presidential candidate, Ekrem İmamoğlu, in March 2025 reinforced this broader interpretation. While the case drew considerable symbolic attention, EU officials treated it primarily as further evidence of institutional pressure rather than as a turning point in EU–Türkiye

relations. The subsequent appeals process, the administrative moves involving trusteeship, and the extensive detentions during public protests were widely noted in the Commission's Türkiye report. Yet, despite these concerns, these events do not appear to have substantially altered Brussels' overall policy approach. The prevailing view is that such developments illustrate the limited space available to the opposition but do not materially change the parameters within which the EU conducts its engagement with Türkiye. This stance further confirms that the normative dimension has largely lost its significance in Brussels-Ankara relations, as pragmatic considerations and a predominantly transactional logic continue to shape the contours of engagement.

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Similarly, the situation of political prisoners, including Osman Kavala and Selahattin Demirtaş, continues to feature prominently in official European assessments. The persistent non-implementation of ECHR judgments, the extensive use of anti-terror legislation, and the high number of detentions among DEM Party members are interpreted as indicators of systemic judicial politicization. EU interlocutors note these cases as central to understanding Türkiye's rule-of-law trajectory, yet they do not expect them to become leverage points shaping the broader direction of the relationship. Rather, they form part of a wider analytical framework through which Brussels evaluates the current state of democracy in Türkiye.

Within this context, the Kurdish political movement is viewed through the same lens of constrained political space and selective prosecution. While earlier moments prompted more vocal European reactions, current discussions in Brussels reflect a cautious, largely observational approach. There is some interest in Ankara's renewed Kurdish Peace Process<sup>10</sup> (a state-led initiative framed as a move toward a 'terror-free Türkiye', referring to the end of the long-running conflict between the Turkish state and the PKK), yet neither the government nor Kurdish political actors signal any intention to involve the EU in the process, whether as an observer or in any broader political capacity.

Across EU institutions, these dynamics collectively shape a recalibrated understanding of domestic political actors in Türkiye. Interviews revealed a mixture of cautious optimism and a more prevailing sense of realism. Many policymakers follow opposition figures, viewing them as credible interlocutors who can help restore institutional dialogue and reduce tensions. Yet the dominant assessment remains that, under current political conditions, their capacity to meaningfully influence the structural trajectory of EU-Türkiye relations is limited, and opposition actors are therefore not regarded as actors capable of independently redirecting the relationship. Although the CHP, as the main opposition party and the strongest opposition force, presents a clear agenda of democratization and expresses its commitment to reviving the EU accession process should it come to power, interlocutors in Brussels remain cautious about the feasibility of such expectations in practice. This caution reflects two intertwined doubts: first, whether a rapid democratic opening is likely even in the event of a government change; and second, whether a renewed democratization process—however meaningful—would be sufficient to render the accession framework functional and realistic again, given the EU's own internal disagreements and prevailing uncertainties about enlargement.

The EU's limited engagement with opposition actors also reflects institutional caution. Officials are wary of being perceived as interfering in domestic politics, preferring to maintain formal neutrality while keeping channels of dialogue open. This approach ensures continuity of dialogue but limits the EU's ability to influence domestic developments or support reformist actors more directly.

# FOREIGN AND SECURITY POLICY: BETWEEN STRATEGIC NECESSITY AND TRUST DEFICITS

**While democratic regression has eroded the normative foundation of the EU–Türkiye relationship, shifting geopolitical realities have amplified its strategic importance. Interviews conducted in Brussels underscore that, despite political stagnation, Türkiye has re-emerged as a central security actor for Europe across multiple regional theatres.**

This dynamic mirrors Ankara’s “peripheral autonomy”<sup>11</sup>: a foreign policy anchored in NATO structures yet capable of maneuvering independently across regional conflicts, economic dependencies, and great-power competition. For many European policy-makers, it is precisely this hybrid posture, neither fully aligned nor fully autonomous, that makes Türkiye indispensable but difficult to integrate into the EU’s emerging security architecture.

Across EU institutions, there is broad recognition that Türkiye’s cooperation is unavoidable in a widening set of strategic domains. The 2025 European Commission report explicitly frames Türkiye as a “key partner” whose engagement is essential for stability in Syria, Ukraine, the South Caucasus, Gaza, and the Black Sea. It highlights Ankara’s contributions to the Black Sea Grain Initiative, its role in facilitating the early rounds of Russia–Ukraine talks in Istanbul, its coordination with Bulgaria and Romania on maritime demining<sup>12</sup>, and its consistent enforcement of the Montreux Convention, an anchor of regional naval stability since February 2022. European diplomats also emphasize that Türkiye’s capacity to maintain open diplomatic

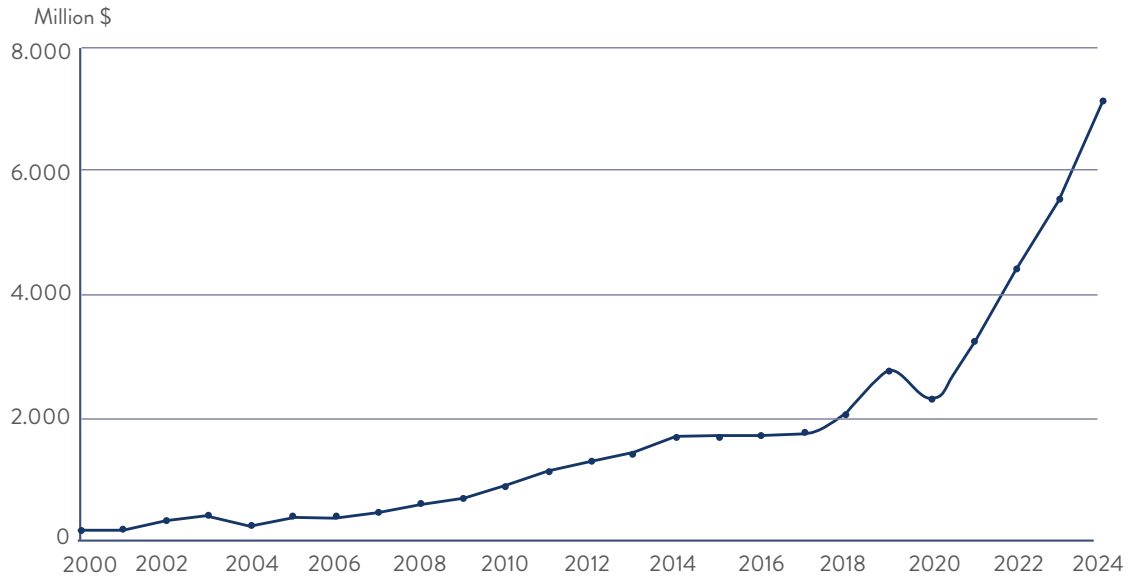
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**Interviews conducted in Brussels underscore that, despite political stagnation, Türkiye has re-emerged as a central security actor for Europe across multiple regional theatres.**

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channels with Moscow constitutes a rare asset at a time when the EU has minimal direct access to the Kremlin. Several interlocutors suggested that this non-Western channel has become “structurally useful” for member states seeking to manage risks of escalation, facilitate humanitarian exchanges, or secure nuclear safety guarantees.

**FIGURE 1: TÜRKİYE’S DEFENSE EXPORTS OVER TIME**



Although not without its challenges, Türkiye’s role within NATO is still among the relatively smoother and more predictable arenas of cooperation. Even officials critical of Ankara’s domestic politics consistently noted that Türkiye contributes critical capabilities, including surveillance assets, air defense systems, and force presence, that are essential for NATO’s deterrence posture. In light of the uncertainty introduced by President Trump’s return to the White House, European interlocutors described Türkiye’s anchoring role as increasingly significant. As US commitments become more transactional, Türkiye’s geographic position and operational weight provide a form of continuity in Alliance planning that a notable number of diplomats view as stabilizing, even when political divergences persist.

Migration also forms a central pillar of this strategic interdependence. Despite political strain, the mechanisms established under the 2016 EU–Türkiye Statement continue to function as the backbone of Europe’s external migration management. The 2025 Commission report again acknowledged Türkiye as the largest refugee-hosting country in the world and praised the continued coordination on irregular migration in the Aegean. Several officials argued that migration management is the “quiet stabilizer” of the relationship: an area where cooperation persists irrespective of the political climate, preventing a deeper rupture at moments of crisis.

Yet, Türkiye’s pursuit of strategic autonomy continues to generate friction. Ankara’s refusal to adopt EU sanctions against Russia, combined with earlier instances of dual-use trade, has created significant mistrust. Nevertheless, officials in DG NEAR highlighted Türkiye’s recent steps to tighten controls, reduce sanctions circumvention, and align more closely with Western restrictions. These incremental adjustments, reducing sanctioned destinations from twenty-four to thirteen, were widely interpreted as evidence that Türkiye can converge with EU and NATO expectations when incentives are clear and political costs manageable.

A central point emerging from the Brussels interviews concerns Türkiye’s exclusion from the EU’s evolving defense-industrial architecture. Initiatives such as PE-SCO, the European Defense Fund, and above all the new SAFE program mark a shift toward a more integrated European defense ecosystem. Türkiye’s absence from these frameworks, due to Greek and Cypriot vetoes, regulatory divergence, and political mistrust, was consistently described as a structural weakness for the EU itself. Several analysts and diplomats argued that building a “geopolitical Europe” while excluding one of NATO’s most capable militaries represents an internal contradiction, particularly given Türkiye’s rapidly expanding defense-industrial base.

The Brussels interviews reflect growing discomfort with the strategic costs of excluding Türkiye from Europe's defense-industrial transformation. A small but notable group of member states—particularly Germany and Italy—appears increasingly aware that Europe cannot achieve defense-industrial resilience while remaining dependent on non-European suppliers and simultaneously sidelining a major NATO producer located at the heart of regional crises. German officials were repeatedly described as quietly encouraging internal Commission discussions about whether partial or functional inclusion mechanisms could be devised for Türkiye within SAFE, especially for areas related to supply-chain security, drone technology, and maritime situational awareness. These ideas remain highly sensitive, yet their emergence marks a subtle shift in the European debate.

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## **The Brussels interviews reflect growing discomfort with the strategic costs of excluding Türkiye from Europe's defense-industrial transformation.**

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At the same time, the interviews also revealed a clear divergence between those who support Türkiye's conditional integration into the SAFE ecosystem and those who view exclusion as a principled requirement. Supporters argue that Türkiye's defense-industrial capacity could strengthen Europe's production cycles, reduce dependency on the United States, and enhance emergency procurement capabilities, an argument aligned with broader concerns about European rearmament. Critics counter that integration without progress on democratic accountability, export controls, and rule-of-law standards would undermine the EU's normative architecture. Several warned that lowering the bar for

Türkiye could create precedents for future engagement with other non-EU partners.

Europe risks consolidating a form of functional integration without political recognition, where Türkiye participates in regional security as a de facto partner but remains excluded from institutional structures. This scenario, already visible in NATO, would preserve tactical cooperation while reinforcing strategic ambiguity. A second scenario, selective bilateral inclusion driven by member states such as Germany or Italy, would create fragmented channels of cooperation, enhancing flexibility but weakening the EU's coherence. A third, more ambitious scenario—conditional participation linked to political normalization—would require progress on the rule of law, sanctions alignment, and the Cyprus dispute. Most Brussels interlocutors considered this scenario desirable but politically improbable in the short term.

Despite these structural barriers, cooperation in NATO remains the most effective venue for strategic alignment. Military planners interviewed in Brussels described Türkiye as operationally reliable, even when political disagreements arise. Its assertive defense posture, especially in the Black Sea, Syria, and Libya, can generate friction at the diplomatic level; yet, many officials view these actions as ultimately serving shared security objectives, particularly when alternative regional actors lack comparable capabilities.

The underlying challenge remains the widening gap between functional interdependence and political trust. Security cooperation continues largely because the alternatives would be costly, ineffective, or destabilizing. Yet political distrust prevents this cooperation from evolving into a deeper and more predictable strategic partnership. For many in Brussels, Türkiye exemplifies the core paradox of Europe's external relations: it is simultaneously indispensable and increasingly distant. As the EU moves toward a more autonomous defense and industrial strategy, Türkiye risks becoming a structurally peripheral yet operationally essential actor, integral to European security, but excluded from the very institutions shaping Europe's future strategic posture.

# ECONOMIC AND TECHNOLOGICAL COOPERATION: THE MOST REALISTIC AVENUE FOR PROGRESS

As political dialogue remains constrained, many of the European interlocutors interviewed in Brussels pointed to the economic and technological domains as the most realistic avenues for meaningful short-term progress. Rather than expressing a universal consensus, officials and analysts repeatedly emphasized, often independently of one another, that economic interdependence remains robust and that structured cooperation in these areas could help stabilize the broader relationship. The 2025 European Commission report echoes this assessment, underscoring that trade flows continue to be substantial, Türkiye is one of the EU's top partners in goods exchange, and the Customs Union<sup>13</sup> remains a critical anchor in the relationship, despite its limitations.

Within this context, several interviewees noted that modernizing the EU-Türkiye Customs Union is widely regarded, at least among officials working on economic files, as the single most impactful step available. The current framework, which dates back to 1995, no longer accurately reflects Türkiye's evolving economy or contemporary global trade patterns. Expanding it to include services, agriculture, e-commerce, public procurement, and digital standards was repeatedly mentioned by Brussels-based officials as a pathway to revitalize economic ties and re-anchor Türkiye more firmly within the EU's regulatory ecosystem. At the same time, interlocutors were clear-eyed about the political obstacles: progress remains tied to broader political conditions, including rule-of-law benchmarks and the unresolved Cyprus issue, reflecting that technical

economic reform cannot be fully insulated from political dynamics.

Energy cooperation emerged in many conversations as another promising yet politically sensitive domain. Europe's efforts to diversify away from Russian hydrocarbons intersect with Türkiye's ambition to position itself as a regional energy hub. European officials who follow energy portfolios highlighted ongoing opportunities in electricity interconnection, LNG transit, and investment in renewables. The 2025 Commission report also notes Türkiye's importance for the EU's energy security architecture. Yet interviewees stressed that alignment remains uneven, particularly regarding green transition objectives and regulatory compatibility. This dynamic has taken on greater urgency follow-

ing President Trump’s public comments urging Türkiye to reduce its energy dependence on Russia—remarks that, according to several diplomats, resonated in Brussels as a reminder of Türkiye’s dual vulnerability and strategic importance.

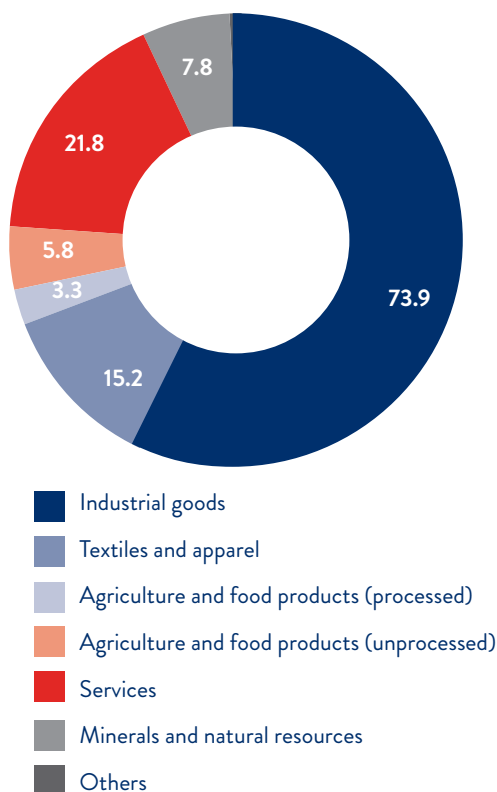
On technological and digital cooperation, Brussels stakeholders described a mix of opportunity and frustration. Türkiye’s industrial and digital capacities—especially in areas such as drones, cybersecurity, and the processing of critical raw materials—are increasingly relevant to Europe’s resilience agenda. However, access for Turkish firms to EU-funded technology programs and research frameworks remains limited by political sensitivities, regulatory gaps, and, in some cases, objections from member states. Several officials described this as a “structural bottleneck”: high potential but constrained channels.

Post-conflict reconstruction was also frequently cited as a field where pragmatic cooperation could advance even in the absence of broader political alignment. Turkish construction and logistics companies have been active in Ukraine<sup>14</sup> since the early stages of the war, and several interlocutors suggested that closer coordination—whether through EU funding instruments or multilateral reconstruction platforms—could accelerate progress. The Commission report similarly highlights Türkiye’s commercial presence in Ukraine and the potential complementarity with EU reconstruction priorities. While the same logic applies to the long-term reconstruction of Syria, interviewees emphasized that the political and legal constraints surrounding Damascus make meaningful cooperation far more remote.

**Economic and technological domains share a critical attribute: they permit cooperation without reopening the contentious debate on the accession framework.**

Taken together, these economic and technological domains share a critical attribute: they permit cooperation without reopening the contentious debate on the accession framework. As multiple Brussels officials observed, they offer “low-politics” mechanisms through which both sides can generate practical gains, rebuild habits of cooperation, and reduce the perception of drift. Yet these opportunities remain ultimately constrained by the broader political environment, and by the extent to which both Ankara and Brussels are willing to insulate economic pragmatism from political stagnation.

**FIGURE 2: TÜRKİYE’S EXPORTS TO EU (2024, BILLION USD)**



# STRUCTURAL OBSTACLES AND ENDURING CONSTRAINTS

Despite pockets of cooperation, structural constraints continue to shape the limits of EU-Türkiye relations. The Cyprus dispute remains the single most persistent barrier. Across the spectrum of policymakers and analysts in Brussels, there is near-universal agreement that no substantial progress can occur without a political settlement—or at least a confidence-building framework—on the island. The veto power exercised by Cyprus and Greece within EU institutions extends beyond the specific dispute, effectively blocking Türkiye's participation in several EU defense and technology initiatives. However, the recent presidential elections in the north of the island, in which Tufan Erhürman won with approximately 62.8% of the vote, suggests a shift that may open new avenues for cooperation and renewed negotiations

Democratic backsliding constitutes a second structural constraint. Even as some European actors advocate for greater pragmatism, continued deterioration in judicial independence, fundamental rights, media freedom, and civic space, as well as non-implementation of ECtHR judgments and domestic court decisions (including Constitutional Court rulings) undermines the credibility of any deeper integration. Officials acknowledge that while engagement has become more interest-driven, the EU cannot entirely set aside its foundational principles without internal repercussions.

A third obstacle concerns the deepening trust deficit, rooted not only in political disagreements but also in fragmented and inconsistent communication between Turkish and European actors. While high-level meetings and diplomatic contacts still occur, they tend to

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**Political stagnation limits the scope for substantive cooperation, while shallow, transactional cooperation provides little incentive for reform or strategic recalibration.**

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be narrowly focused on transactional issues—such as migration management, customs disputes, and security coordination—rather than on rebuilding political confidence or articulating a shared strategic vision. At the EU institutional level, informal channels of dialogue that once facilitated crisis management, technical problem-solving, and confidence-building have thinned considerably. This reduction in routine, working-level engagement reinforces the perception that the relationship lacks genuine political ownership and is increasingly managed on an ad hoc basis. The result is a self-reinforcing cycle: political stagnation limits the scope for substantive cooperation, while shallow, transactional cooperation provides little incentive for reform or strategic recalibration. Breaking this cycle would require renewed institutional commitment and political courage on both sides, qualities that remain in short supply.

# FUTURE SCENARIOS FOR EU–TÜRKİYE RELATIONS (2025–2030)

Looking ahead, three broad scenarios can be identified for the evolution of EU–Türkiye relations over the next five years. The first and most likely scenario is one of managed pragmatism. Under this trajectory, cooperation continues in areas where interdependence is unavoidable, migration management, Black Sea security, economic coordination, and limited technical dialogue, while both sides avoid political confrontation. Incremental progress may occur in sanctions alignment, energy projects, or specific aspects of the Customs Union, but without addressing core political obstacles such as democratic backsliding or the Cyprus dispute. This model offers stability but risks entrenching the transactional nature of the relationship.

A second, more optimistic scenario envisions strategic re-engagement. This would require meaningful political signals from Ankara—such as limited judicial reforms, improvements in fundamental freedoms, or confidence-building measures on Cyprus—combined with a growing recognition in Brussels that continued exclusion of Türkiye carries strategic and industrial costs. Under this path, high-level dialogue could revive, selected areas of defense cooperation might open, and member states advocating a more pragmatic approach could push for functional participation in emerging initiatives such as SAFE. Most interlocutors, however, consider this scenario unlikely without significant external triggers, such as shifts in US policy, renewed instability in the neighborhood, or significant shifts in domestic political configurations on either side.

The third, more pessimistic scenario is one of gradual decoupling. Further deepening authoritarianism in Türkiye, coupled with rising protectionism or political polarization within the EU, could narrow the relation-

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**The first scenario namely managed pragmatism, clearly dominates, with cooperation on Ukraine diplomacy, Black Sea security, and migration continuing despite political distance.**

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ship to a minimal and largely functional arrangement centered on migration control and crisis management. Economic ties would endure, but political dialogue and institutional cooperation would erode, leaving Türkiye formally a candidate country yet increasingly

detached from the EU’s political community. Elements of this dynamic are already visible in the cautious tone of the 2025 Commission report and in the warnings voiced by several Brussels officials about the risks of “quiet disengagement.”

At present, the first scenario namely managed pragmatism, clearly dominates, with cooperation on Ukraine

diplomacy, Black Sea security, and migration continuing despite political distance. Yet this balance remains fragile. Domestic developments in Türkiye, leadership transitions within the EU, and broader geopolitical realignments in the Middle East, Ukraine, and the Caucasus could all tilt the relationship toward either renewed engagement or further drift.

TABLE 1: TÜRKİYE-EU RELATIONS SCENARIOS (2025-2030)

| Scenario                                          | Core Idea                                                                                  | Opportunities                                                                                                 | Risks / Limits                                                                             |
|---------------------------------------------------|--------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| <b>1. Managed Pragmatism</b><br>(Baseline)        | Functional cooperation where interdependence is unavoidable; political distance persists.  | Stability in migration, Black Sea security, and trade; limited sectoral progress (Customs Union, energy).     | Entrenched transactionalism; no movement on Cyprus or rule of law, fragile trust.          |
| <b>2. Strategic Re-Engagement</b><br>(Optimistic) | Political signals from Ankara + EU recognition of strategic costs enable renewed dialogue. | Revived high-level diplomacy; selective defence cooperation (SAFE modalities); incremental reform incentives. | Requires major political shifts; veto risks; dependent on external shocks.                 |
| <b>3. Gradual Decoupling</b><br>(Pessimistic)     | Relationship narrows to minimal cooperation around migration and crisis management.        | Basic functional coordination continues; trade flows remain.                                                  | Erosion of political dialogue: shrinking institutional ties; growing strategic divergence. |

# POLICY IMPLICATIONS AND RECOMMENDATIONS

For the European Union, the central challenge is to strike a balance between strategic necessity and normative credibility. This challenge emerges at a moment when global authoritarianism is on the rise and the EU's role as a normative actor is increasingly questioned—not only in relation to Türkiye but also more broadly, as doubts persist about its capacity, coherence, and shifting internal priorities.

Ongoing debates on differentiated integration within the Union further complicate this picture, as they raise the possibility of flexible and multi-tiered forms of engagement, while simultaneously exposing the political dilemmas of treating partners differently across policy domains. Nevertheless, it is a fact that the EU can no longer afford to treat Türkiye solely as an accession file frozen in time. Instead, engagement should be reframed as a multidimensional partnership grounded in shared interests but conditioned by democratic principles. Achieving this requires finding a workable equilibrium between strategic pragmatism and principled conditionality—a task that is inherently difficult and full of trade-offs, yet not impossible if guided by clear priorities and realistic sequencing. The four concrete policy proposals outlined below illustrate how such an equilibrium could be operationalized in practice.

First, the EU should recognize the strategic cost of non-enlargement. Excluding Türkiye from Europe's evolving security and industrial ecosystem undermines the EU's ambition to become a geopolitical actor. A differentiated-integration approach could help bridge this gap, allowing for structured cooperation on en-

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**The EU can no longer afford to treat Türkiye solely as an accession file frozen in time. Instead, engagement should be reframed as a multidimensional partnership grounded in shared interests but conditioned by democratic principles.**

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ergy, digital innovation, and defense while upholding conditionality where necessary.

Second, the modernization of the Customs Union should be prioritized as a realistic instrument of re-engagement. A reformed agreement would anchor eco-

conomic interdependence in a transparent regulatory framework, offering tangible benefits to both parties.

Third, the EU should maintain conditionality in principle but apply it strategically. Linkages between defense cooperation and rule-of-law progress could create positive incentives for reform while avoiding the perception of moralizing rhetoric detached from reality. A phased conditionality framework, sequencing technical cooperation first and political benchmarks second, could help overcome some of the existing dilemmas.

For Türkiye, the path to renewed credibility lies in signaling a genuine commitment to democratic governance. Even modest steps to halt democratic erosion and outline a credible path back toward rule-of-law stand-

ards would carry disproportionate symbolic weight. Confidence-building measures on Cyprus, such as technical cooperation or joint economic initiatives, could also open diplomatic space for dialogue.

Finally, both sides would benefit from rebuilding institutional and societal connectivity. Establishing an EU-Türkiye energy and reconstruction task force, reviving Track-II dialogues among think tanks and civil society and increasing academic and youth mobility could gradually restore trust from the bottom up. These low-politicized channels of engagement offer practical ways to navigate the broader strategic dilemmas while keeping cooperation viable even in periods of political tension.

# CONCLUSION

EU–Türkiye relations are currently defined by a persistent paradox. The two sides are deeply interdependent in terms of security, trade, migration, and regional diplomacy; yet this interdependence has not yielded a coherent, shared project. The 2025 Commission report and interviews that we conducted in Brussels suggest a relationship driven less by enlargement and convergence than by “interdependence without integration”: a dense network of functional ties managed in the absence of a shared strategic vision.

What the Commission report refers to as “democratic backsliding” in Türkiye has been a central factor in this shift. The consolidation of the hyper-presidentialism, the politicization of the judiciary, and sustained pressure on opposition actors and civil society have effectively closed the space for a rules-based, accession-driven engagement. At the same time, the EU’s own enlargement fatigue and internal divisions have limited its capacity to offer credible incentives or pathways for reform. The result is a mutual adjustment to a lower level of political ambition.

Yet the relationship is not merely drifting. In foreign and security policy, Türkiye has reasserted itself as a central actor in Europe’s neighborhood. Its mediation between Russia and Ukraine, role in Black Sea security and grain exports, enforcement of the Montreux Convention, and continued cooperation within NATO and on migration underpin a degree of practical indispensability that few in Brussels contest. This duality—increasing authoritarianism at home and strategic importance abroad—has generated the pattern of “managed pragmatism” described in this report: cooperation where it is unavoidable, avoidance where it is politically costly.

The three scenarios outlined—managed pragmatism, strategic re-engagement, and gradual decoupling—should be read as possible trajectories rather than forecasts. At present, managed pragmatism dominates, held together by necessity: the need to control irregular migration, manage the fallout of Russia’s war in Ukraine, navigate instability in the Middle East, and safeguard trade and energy corridors. But this equilibrium is fragile. Domestic developments in Türkiye, leadership shifts within the EU, renewed tensions over Cyprus, or new regional shocks could all push the relationship toward cautious re-engagement or incremental disengagement.

The choice facing both sides is therefore not between a return to the past or a clean break, but between allowing a purely transactional relationship to harden, or investing in a more deliberate, sequenced recalibration. For the EU, continuing to treat Türkiye primarily as a stalled accession file risks entrenching a pattern of permanent low-intensity crisis management. For Türkiye, seeking strategic recognition without addressing core governance and rule-of-law concerns will limit access to Europe’s evolving security and industrial architecture.

A more sustainable recalibration would rest on three pillars: credible steps to halt and reverse democratic backsliding in Türkiye; a more unified and strategically coherent EU approach that recognizes the costs of exclusion; and the development of low-politics platforms—such as Customs Union modernization, energy and digital cooperation, and reconstruction

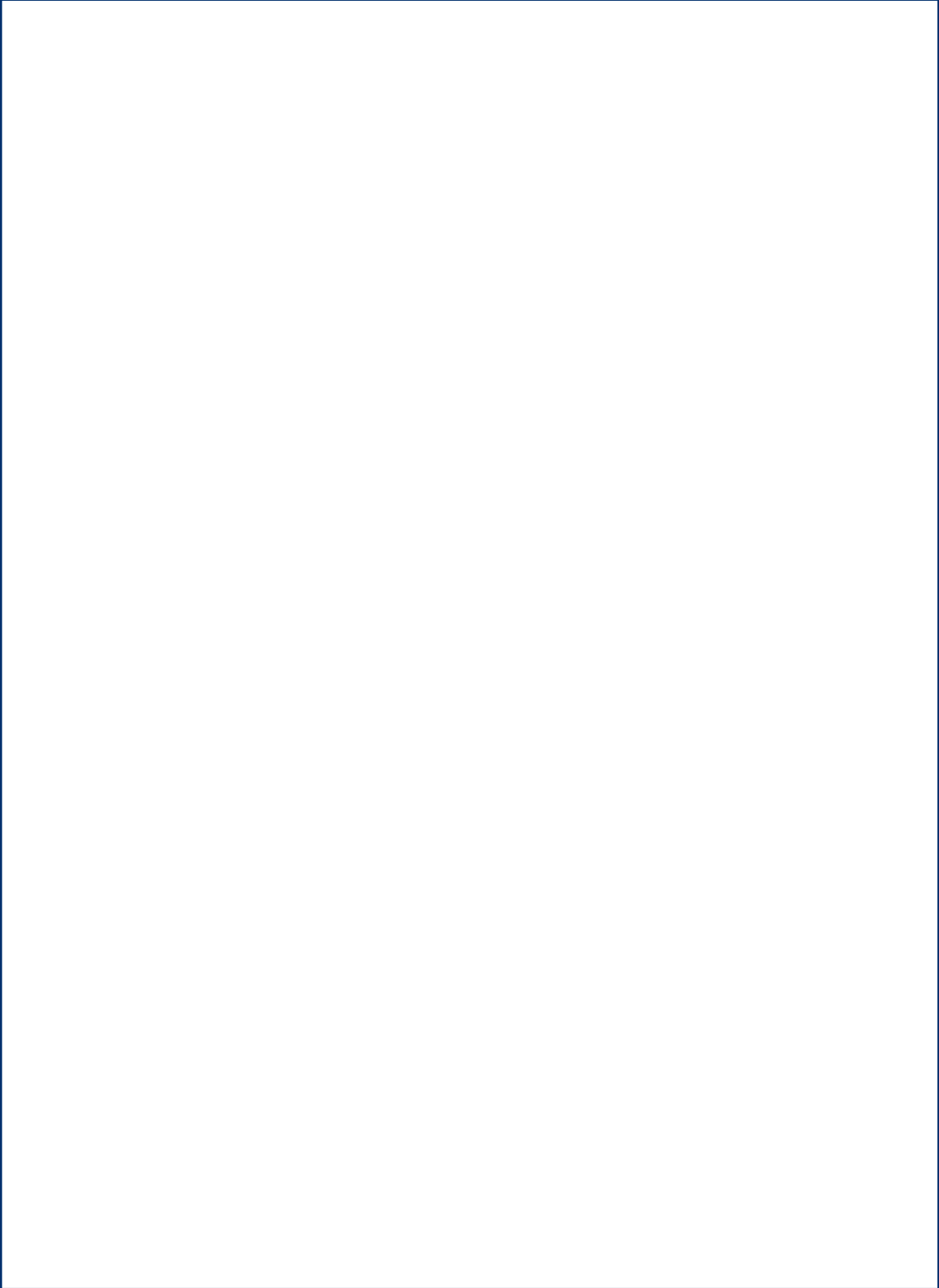
partnerships—that can rebuild habits of cooperation. Without such efforts, managed pragmatism may endure, but at growing cost to the EU’s geopolitical and normative ambitions and to Türkiye’s ability to anchor its long-term security and prosperity within a European framework.

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# NOTES





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