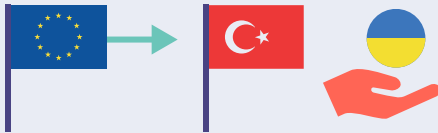


EU-Turkey relations in the age of Trump II: between blocked accession and forced cooperation



With Donald Trump's return to the White House, the volatility of Europe's security landscape has driven EU Member States to draw closer to Turkey, which joined the newly formed "Coalition of the willing" in early March, in support of Ukraine.



On 21 March 2025, Turkey's European partners conveyed the conclusions of the previous day's European Council meeting, recognising Turkey as a "like-minded" country

→ alongside:



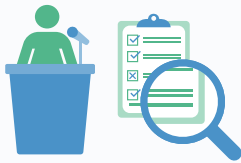
ICELAND



NORWAY



UNITED KINGDOM



This shifting context prompts Turkish President Recep Tayyip Erdoğan to once again raise the issue of Turkey's bid for European Union membership, even though accession negotiations, opened nearly 20 years ago, have stalled for the past 7 years.

While the EU carefully avoids any revival of negotiations, it finds itself compelled to edge closer to its difficult yet indispensable neighbour



seeking both to

bolster Ukraine

enhance its own defense capacities



a new chapter thus begins in the relationship between Brussels and Ankara



Where does this relationship stand today?
What fault lines remain, especially within the accession process?
What new challenges has the current geopolitical climate brought to the fore?

1

Turkey, a historic partner...¹



AREA



780,576 km²

→ 23,764 km² lie in Europe (3%)



638,475 km²

PUBLIC SUPPORT FOR EU MEMBERSHIP



+5 points in 4 years



GROSS DOMESTIC PRODUCT (2023)

18th globally



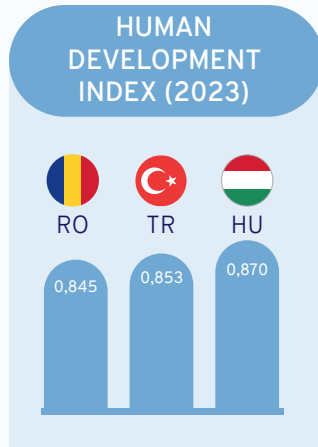
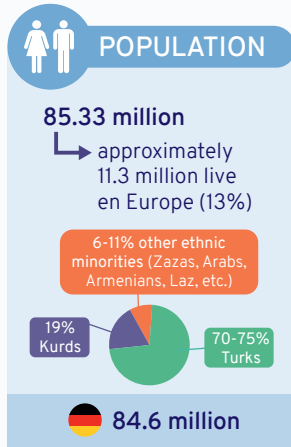
\$809.2 billion



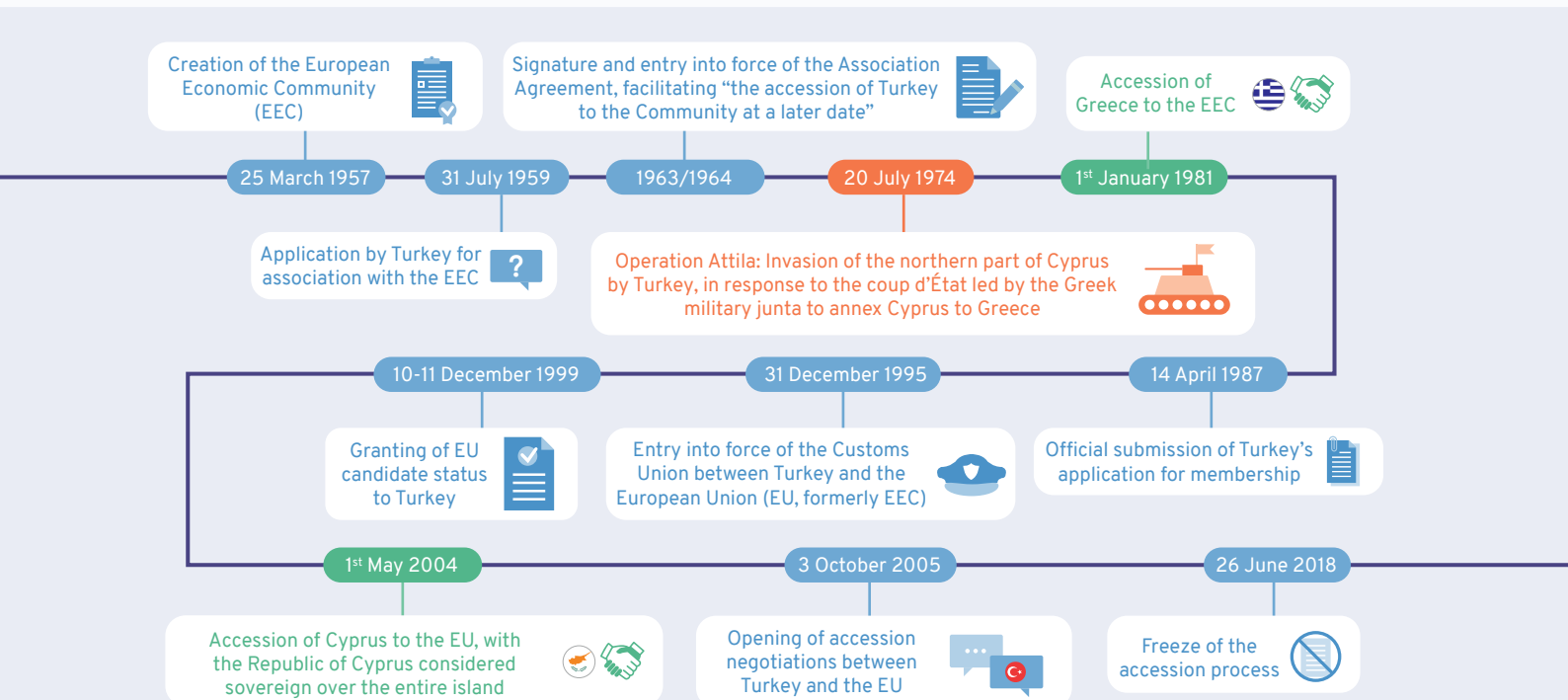
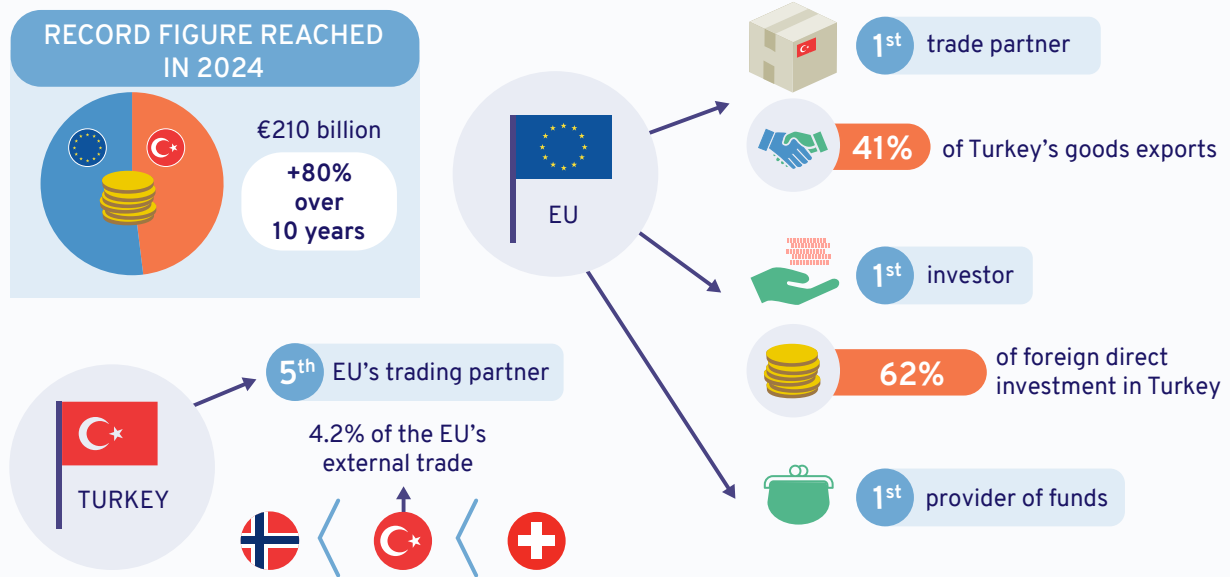
\$1,118.3 billion



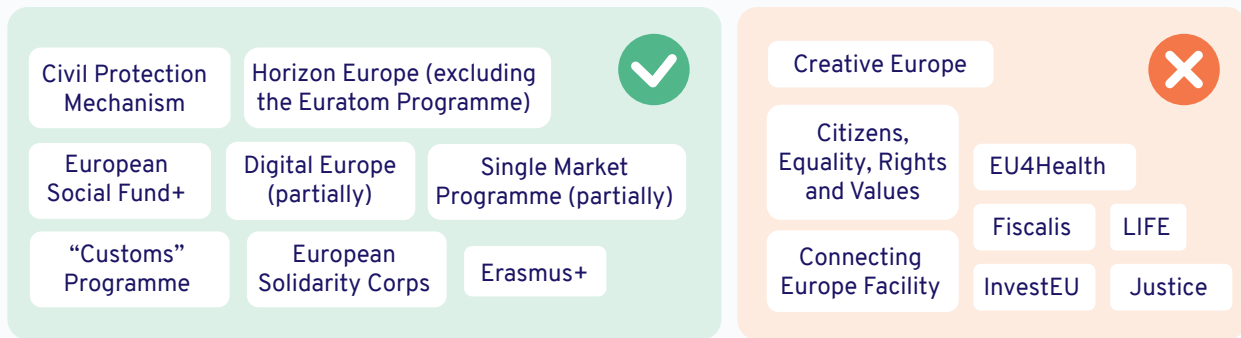
\$1,154.4 billion



Bilateral trade between Turkey and the EU²



EU programmes involving Turkey



State of accession negotiations



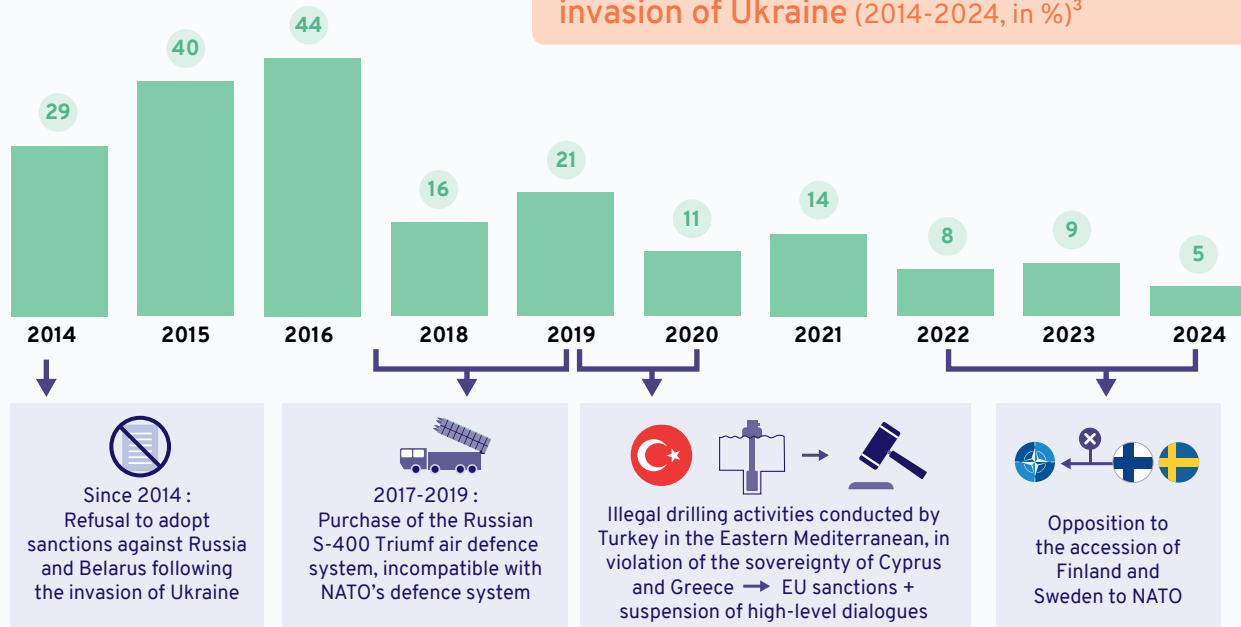
2

...but a candidate on hold



Statements from both the EU and its Member States increasingly refer to Turkey merely as a “partner,” with no mention of its candidate status – much to Ankara’s dismay. While EU–Turkey relations have long been marked by friction, the two sides have rarely appeared as far apart as they have over the past decade, further eroding mutual trust.

Turkey’s alignment rate with the EU’s Common Foreign and Security Policy (CFSP) since Russia’s invasion of Ukraine (2014-2024, in %)³



A longstanding dispute: The Cyprus question

2004

Greek Cypriot rejection of the *Annan Plan*



Republic of Cyprus's accession to the EU



all subsequent attempts to revive peace talks have ended in failure



Several core issues remain unresolved:

- the island's political status (federation, confederation, or two-state solution)
- the return of refugees
- the presence of Turkish troops
- the full implementation of the Customs Union

By admitting Cyprus, the EU not only incorporated a frozen conflict between one of its Member States and Turkey, but also effectively nullified its ability to act as an impartial mediator in resolving the Cyprus issue.



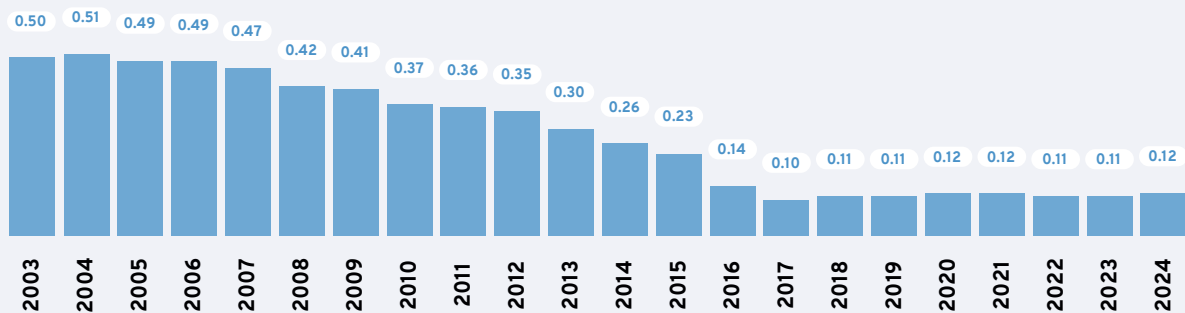
Domestically, Turkey faces structural challenges that remain incompatible with the Copenhagen criteria – the very basis of the accession process.



POLITICAL CRITERION

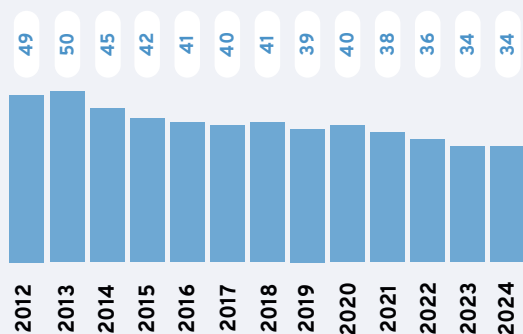
Erosion of the rule of law and authoritarian drift

Liberal Democracy Index since Recep Tayyip Erdoğan's rise to power in Turkey (2003-2024, V-Dem Institute)⁴



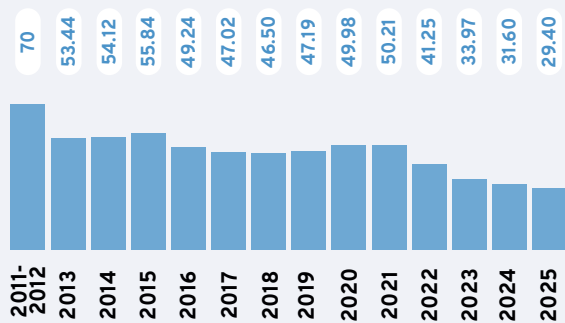
Corruption Perceptions Index in Turkey

(2012-2024, Transparency International)⁶



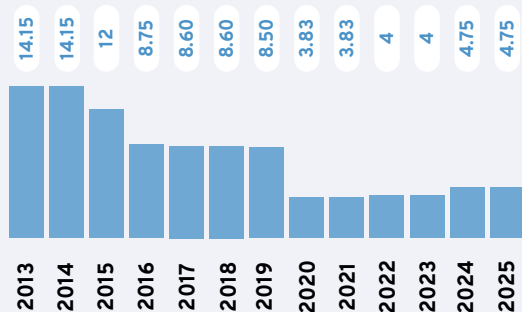
Turkey's score in the World Press Freedom Index

(2011-2024, Reporters Without Borders)⁵



Turkey's score on the Rainbow Map regarding the situation of LGBTI people

(2013-2025, ILGA-Europe)⁷



Political figures in detention



Selahattin Demirtaş



Figen Yüksekdağ

Former co-chairs of the Peoples' Democratic Party (HDP): imprisoned since 2016, sentenced respectively to 42 and 30 years in prison in 2024



Ekrem İmamoğlu

Mayor of Istanbul, member of the Republican People's Party (CHP): imprisoned in March 2025 on "corruption" charges



Can Atalay

Lawyer and former MP from the Workers' Party of Turkey (TİP): imprisoned since 2017, sentenced to 18 years in prison in 2022



Osman Kavala

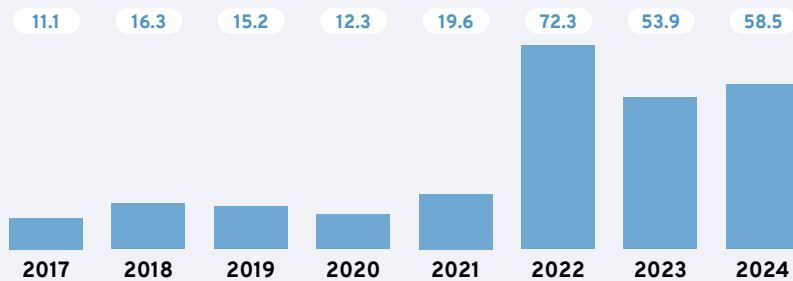
Philanthropist: imprisoned since 2017, sentenced to life imprisonment in 2022



ECONOMIC CRITERION

Inflation and devaluation

Inflation in Turkey (% , 2017-2024, World Bank)⁸



Evolution of the exchange rate of the Turkish lira against the euro (2017-2025, European Central Bank)⁹



3

Toward a major reset?



In the face of the Russian threat and the volatility of the transatlantic alliance, unity has become imperative to ensure the continent's security. In this new context, Turkey has succeeded in reminding its European partners of its relevance, winning them over with the competitiveness of its defence industry and its potential to contribute to the reshaping of Europe's security architecture.

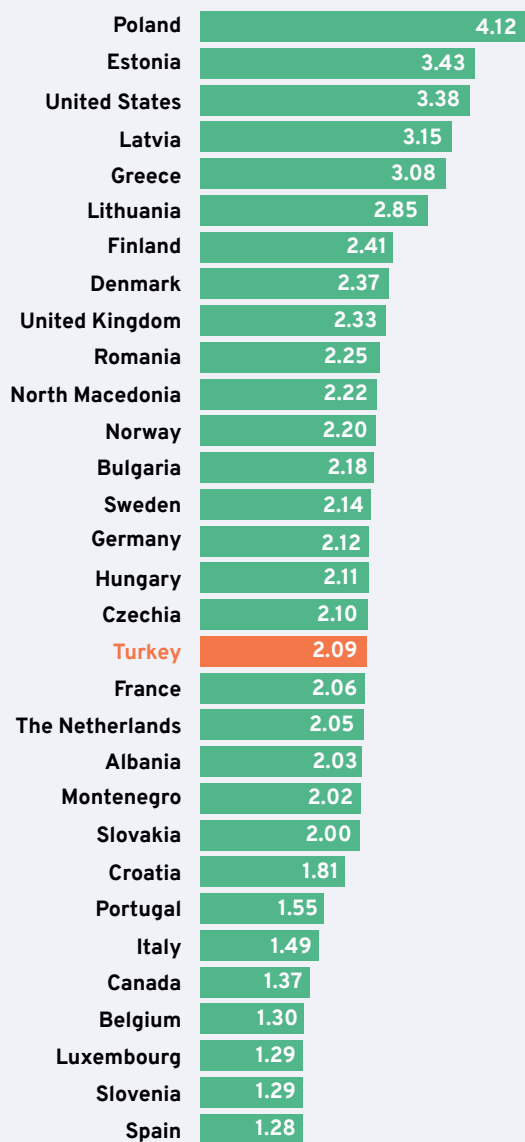
NATO's 2nd largest army in terms of active personnel, relies on a defence industry aligned with the Alliance's standards
Its military exports are booming, driven by swift and substantial deliveries.

As Europe scrambles to address urgent capability gaps, Turkey's operational experience – notably in Ukraine, a contribution it is keen to highlight – and the international success of its *Bayraktar* TB2 tactical drones, produced by the company Baykar, have already convinced 6 EU Member and candidate States to acquire them.



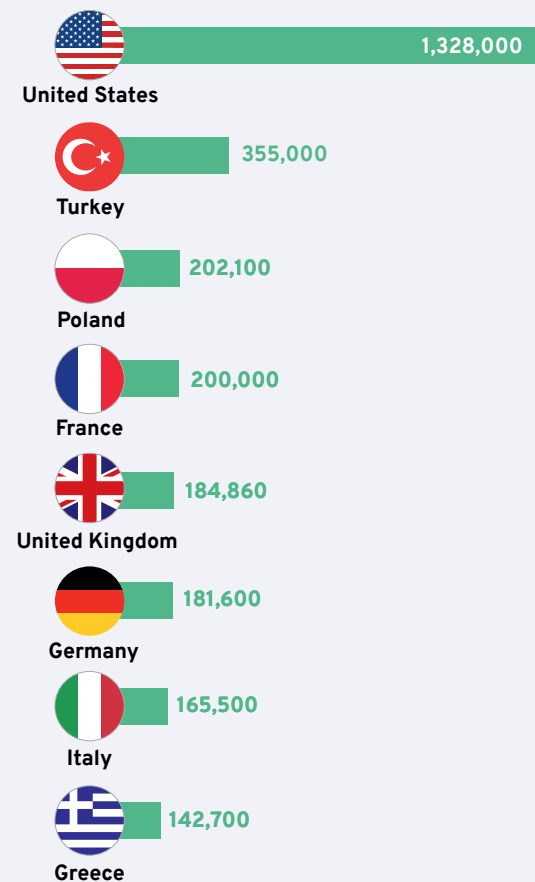
Defence expenditure as a share of GDP

(in %, 2024, NATO)¹¹



Number of active personnel in major NATO armies

(2025, Global Firepower)¹⁰



European partners of Turkey's defence industry

- EU Member State
- EU accession candidate or potential candidate
- NATO Member State
- NATO candidate
- State signatory to a military cooperation agreement with Turkey
- State signatory to a contract with Baykar
- State negotiating a contract with Baykar
- State in partnership with a Turkish defence industry company

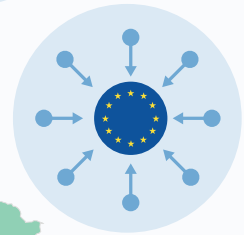


Beyond the security context, Europe remains hungry for hydrocarbons, despite its efforts to break free from dependence on Russia since the full-scale invasion of Ukraine and despite its energy transition.

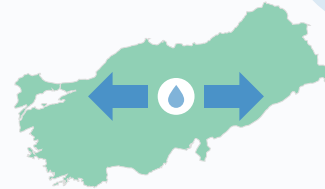


End of the gas transit agreement between Russia and Ukraine which had ensured a steady flow of Russian gas to the EU

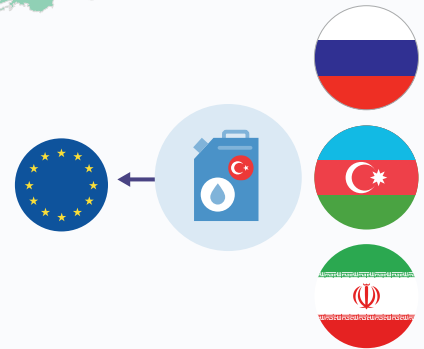
European countries are now more determined than ever to diversify their short-term energy supply sources



Benefiting from a unique geographical position, at the crossroads of energy routes linking exporting and importing countries, Turkey is seeking to position itself as a strategic regional energy hub.



Turkey is thus reinforcing its role as a transit platform, particularly for natural gas and oil destined for Europe. While it invested in its own production, exploring resources in the Black Sea and the Mediterranean, it primarily imports gas from Russia, Azerbaijan, and Iran, which it then re-exports to Europe, notably via the Trans-Adriatic Pipeline (TAP). In parallel, Turkey has developed a specialisation in refining Russian crude oil – a loophole in EU sanctions that allows the processed product to reach European markets without directly violating them.



Key gas infrastructure and local fields





With Turkey's EU accession process stalled for the foreseeable future, what does the current warming of ties between Brussels and Ankara really mean?



Cyprus: Towards a resumption of peace talks?



PROBABILITY:
VERY LOW



After a first meeting initiated by the United Nations Secretary-General in March and attended by the United Kingdom, Greece, Turkey, and the EU, the one scheduled for July between Greek Cypriots and Turkish Cypriots raises little hope.



Democracy: Towards reconsolidation?



PROBABILITY:
VERY LOW



The recent arrest of Istanbul's mayor, Ekrem İmamoğlu, marks a turning point in the country's drift toward what the European Parliament has labelled a "fully authoritarian" regime. The mass repression that followed the protests has crushed the domestic political space, leaving little hope for democratic reconsolidation – a troubling signal for both the accession process and foreign investors.



Customs Union and visa liberalisation: Towards a breakthrough?



PROBABILITY:
LOW



Modernising the customs union – outdated for 21st-century challenges, especially due to its exclusion of services – and introducing at least targeted visa liberalisation would provide a powerful lever for strengthening bilateral exchanges. However, Ankara's persistent reluctance to implement its commitments continues to block any meaningful progress.



Ukraine: Towards effective mediation with Russia?



PROBABILITY:
LOW TO MEDIUM



On 16 May 2025, Turkey facilitated the largest prisoner exchange since the start of the war, during direct negotiations in Istanbul – the first in three years. Ankara is leveraging its open channels with both parties to assert itself as a regional mediator. However, Vladimir Putin's refusal to travel to Turkey the day before highlights the limited scope of this mediation.



Defence: Towards greater participation in Europe's security architecture?



PROBABILITY:
MEDIUM



The current context offers new opportunities for cooperation between the EU and Turkey. The EU is seeking to rapidly strengthen its defence capabilities, while Ankara sees this as a chance to showcase its defence industrial base and boost exports. However, reluctance from certain Member States – keen to protect their national champions and wary of an unpredictable partner – continues to hinder any prospect of full integration into this emerging security framework.



Migration: Towards stronger cooperation with the EU?



PROBABILITY:
HIGH



Migration remains the main lever of cooperation between the EU and Turkey. Both sides share a strategic interest, particularly in Syria: supporting the political transition and safeguarding the country's territorial integrity – especially in light of the Israeli military campaign – in order to eventually create conditions for the voluntary return of refugees.

1 French Ministry for Europe and Foreign Affairs (website retrieved on 22 May 2025), [Présentation de la Turquie & Présentation de l'Allemagne](#) (in French); Noémie Galland-Beaune, « La superficie des pays de l'Union européenne », [Toute l'Europe](#), 27 September 2022; Central Intelligence Agency, (website retrieved on 22 May 2025), [The World Factbook](#); Turkey (Turkiye), Washington, D.C; World Bank, GDP (current US\$) & GDP per capita, PPP (current international \$); United Nations Development Programme, [Human Development Index \(HDI\)](#); İktisadi Kalkınma Vakfı, İKV held a meeting called "Results of Research on EU Support and Perception of Europe in Public Opinion 2023", 27 October 2023.

2. European Commission (website retrieved on 22 May 2025), [Türkiye. Facts, figures and latest developments](#); [Türkiye 2024 Report](#), Commission Staff Working Document, Accompanying the document [Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions](#), 2024 Communication on EU enlargement policy, SWD(2024) 696 final, Bruxelles, 30 October 2024.

3. The data are drawn from the European Commission's annual enlargement reports, available on its website.

4. [V-Dem Institute](#), Liberal Democracy Index, Varieties of Democracy Project.

5. Reporters Without Borders, [World Press Freedom Index](#). Note: The closer the score is to 0, the more restricted press freedom is in the country.

6. Transparency International, [Corruption Perceptions Index](#). Note: The closer the index is to 0, the more corrupt the country is perceived to be.

7. European Region of the International Lesbian and Gay Association (ILGA-Europe), [Rainbow Map](#). Note: The closer the score is to 0, the more precarious the situation of LGBTI people in the country.

8. World Bank, [Inflation, consumer prices \(annual %\) - Türkiye](#). The rates provided are based on official data from the Turkish Statistical Institute (TÜİK). However, these figures have been contested by independent economists, notably those from the Inflation Research Group, who argue that official statistics systematically underestimate inflation (see: ENAGrup, [ENAGrup Tüketici Fiyat Endeksi](#)).

9. European Central Bank (website retrieved on 22 May 2025), [Turkish lira \(TRY\)](#).

10. Global Firepower (website retrieved on 22 May 2025), [Active Military Manpower by Country \(2025\)](#).

11. North Atlantic Treaty Organization (website retrieved on 22 May 2025), [Defence Expenditure of NATO Countries \(2014-2024\)](#), Press release, 17 June 2024.