Wilfried
Martens Centre
for European Studies

Reimagining EU–Türkiye Relations: Between Deeper Integration and Transactionalism

Scenarios and Policy Recommendations to 2035

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Summary

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The EU and Türkiye need each other, yet their relationship has been at an impasse for years. Accession talks have effectively stalled, while disagreements over democracy, the rule of law and regional conflicts continue to constrain cooperation. Meanwhile, trade, migration, energy, connectivity and shared security challenges keep the two sides closely connected. In an increasingly volatile geopolitical and geo-economic landscape, the question is no longer whether they will cooperate, but whether that cooperation can become more structured, predictable and resilient. This brief explores how the EU and Türkiye could build a more stable relationship by 2035.

The brief explores two possible futures. In the first scenario, *integration deepens gradually* through clearer rules, stronger institutions, and closer links between businesses and societies. EU membership remains the ultimate reference point of the relationship, without being treated as an imminent prospect. In the second, *transactionalism* becomes the dominant model, with cooperation centred on individual deals where interests overlap. Such deals can produce tangible results, but they remain vulnerable to political crises, shifting priorities and mutual distrust. The fundamental difference is whether cooperation builds lasting commitments or depends mainly on bargains struck in response to immediate pressures.

Several steps make sense in either case. Both sides should restore regular high-level political and technical dialogue, improve the functioning of the Customs Union, provide greater legal certainty for investors, and protect energy, transport and digital connections. Migration cooperation should be based on clearly defined responsibilities, transparent funding, and respect for international and humanitarian obligations. People-to-people contacts, including exchanges between universities, young people, cities and civil society, should be protected even when governments disagree. In the security sphere, greater cooperation

should reflect Türkiye's role as a NATO ally and Europe's growing need for capable and reliable partners.

A path towards deeper integration would require a stepwise agenda to modernise the Customs Union, expand research and innovation partnerships, support the green and industrial transitions, improve mobility for students, researchers and skilled professionals, explore a more substantive EU–Türkiye security partnership and strengthen defence cooperation. Should relations remain predominantly transactional, agreed procedures and institutional safeguards should help prevent political disputes from disrupting trade, investment and other areas of practical cooperation.

The brief recommends pursuing achievable improvements now while maintaining clear standards on fundamental rights, judicial independence and compliance with EU rules and sanctions. Greater cooperation should follow demonstrable progress and mutual commitments. The aim is to deliver tangible benefits for citizens and businesses, reduce the risk that political crises spill over into the broader relationship, strengthen Europe's resilience and security, and keep the door open to a closer EU–Türkiye relationship in the future.

Keywords EU, Türkiye, EU enlargement, Dialogue, Integration, Transactionalism

Introduction

When the EU granted Türkiye candidate country status in 1999 and opened accession negotiations in 2005, the world was quite different. The optimism that followed the end of the Cold War, the successful integration of new member states into the Union, and the positive political and societal dynamics in Türkiye contrast sharply with the geopolitical and domestic realities facing both sides today. Significant backsliding in EU–Türkiye relations over the past two decades has brought the accession negotiations to an almost complete standstill. This situation contrasts with the European Commission's continued description of Türkiye as a 'key partner for the European Union and a candidate country'.[1] At the same time, scepticism about Türkiye's accession prospects has grown across parts of the European political landscape. The European People's Party (EPP), for example, explicitly called for an end to the accession process in its 2019 manifesto, declaring that EU membership was 'not an option' for Türkiye.[2] This position reflects a broader scepticism towards Türkiye's full membership, as documented by public opinion research.[3] Yet, the EPP's 2024 manifesto adopted a more nuanced approach, continuing to rule out accession under the prevailing political circumstances while advocating an upgraded Customs Union, which included visa facilitation, for a renewed, positive EU–Türkiye partnership.[4] This illustrates a central tension in EU–Türkiye relations: persistent political obstacles to accession coexist with a growing recognition of the mutual benefits of closer cooperation.

In this context, the European Commission has shown a renewed sense of urgency over the past several years, 'to look with fresh eyes at EU–Türkiye relations', as Enlargement Commissioner Marta Kos emphasised during her first official

1 European Commission, *Türkiye 2025 Report*, Commission Staff Working Document, SWD (2025) 756 final (4 November 2025), 2.

2 EPP, *EPP Manifesto: Let's Open the Next Chapter for Europe Together* (Brussels: Wilfried Martens Centre for European Studies, 2019), 7.

3 Directorate-General for Enlargement and Eastern Neighbourhood, 'Majority of EU Citizens Support Further EU Enlargement, New Eurobarometer Survey Shows, While Perception Surveys in Candidate Countries Point to Overall Support for EU Accession' (2 September 2025); Peter Hefele, *Keeping the European Momentum: A Pan-European Study on EU Enlargement and Deepening,* Wilfried Martens Centre for European Studies (Brussels, 21 October 2024).

4 EPP, *EPP 2024 Manifesto: Our Europe, a Safe and Good Home for the People* (Brussels, Wilfried Martens Centre for European Studies, 2024).

visit to Ankara on 6 February 2026.[5] Already in 2023, the *Joint Communication on the State of Play of EU–Türkiye Political, Economic and Trade Relations* acknowledged that the full positive potential of the EU–Türkiye relationship had yet to materialise.[6] This reassessment gained further political momentum in 2026, culminating in the NATO Summit in Ankara, where European Commission President Ursula von der Leyen and European Council President António Costa stressed that 'the EU and Türkiye are strategic partners' and that, in an increasingly challenging geopolitical environment, 'our partnership matters more than ever'.[7]

This high-level political message was reinforced by the visit to Türkiye by the High Representative for Foreign Affairs and Security Policy and Vice-President of the European Commission Kaja Kallas, together with Commissioners Marta Kos and Magnus Brunner, and by the accompanying joint statement, which situated EU–Türkiye relations within a broader global context. The statement recalled Türkiye's candidate status and highlighted the strategic importance of cooperation in areas of shared interest, including economic resilience, trade, connectivity, migration, security and foreign policy challenges.[8] The economic dimension of this renewed engagement was further underlined by Commissioner Valdis Dombrovskis, who highlighted the depth of EU–Türkiye economic interdependence, with bilateral trade having reached a record high of over €217 billion in 2025. He stressed the importance of further strengthening cooperation through the EU–Türkiye High-Level Economic Dialogue.[9] Taken together, these developments point to the need for a realistic yet open-minded and ambitious view of the challenges and opportunities shaping relations between the two neighbours and middle powers.

Lately, the EU's evolving competitiveness agenda has added a further dimension to this relationship. Discussions surrounding initiatives such as 'Made in Europe' and the Industrial Accelerator Act raise important questions about the future framework for industrial cooperation, supply-chain resilience and Türkiye's

5 M. Kos (@MartaKosEU), 'As Realities in Europe Are Changing, We Need to Look With Fresh Eyes at EU–Türkiye Relations . . .', *X* (6 February 2026).

6 Directorate-General for Neighbourhood and Enlargement Negotiations, *State of Play of EU–Türkiye Political, Economic and Trade Relations*, Joint Communication, JOIN (2023) 50 final (29 November 2023).

7 A. Costa (@eucopresident), 'Thank You, President @RTErdogan, for the Warm Welcome to Ankara . . .', *X* (9 July 2026); U. von der Leyen (@vonderleyen), 'Thank You, President @RTErdogan, for the Warm Welcome to Ankara . . .', *X* (8 July 2026).

8 European Commission, 'Joint Press Release by Türkiye's FM Hakan Fidan, HR/VP Kaja Kallas, and EU Commissioners Marta Kos and Magnus Brunner Following Their Meeting in Ankara' (30 June 2026).

9 Delegation of the European Union to Türkiye, 'Statement by Commissioner Dombrovskis Following the EU–Türkiye High-Level Economic Dialogue' (2 July 2026).

place in European value chains. As the scope and conditions for participation remain subject to political and regulatory debate, these discussions underscore the importance of ensuring that the future direction of EU industrial policy takes into account the depth of EU–Türkiye economic interdependence and the mutual benefits of closer cooperation.

With this policy brief, the Wilfried Martens Centre for European Studies seeks to contribute to the ongoing debate within the European institutions and across European and Turkish societies. The authors have developed a series of policy recommendations that aim to unlock the potential of cooperation across various policy fields, from economic relations to scientific exchange. Breaking the current stalemate in bilateral relations requires broadening and revitalising existing channels of communication, exchange and cooperation. Such a comprehensive approach provides a more flexible framework, and this flexibility is needed because of the danger of major setbacks, whether induced by domestic developments on either side or by external shocks. The scenarios explored in this brief are therefore not intended to predict a single future for EU–Türkiye relations, but rather to illustrate how different choices and circumstances could shape the relationship. Against this backdrop, the brief argues that there is value in pursuing opportunities for cooperation today, while retaining the flexibility to adapt to changing circumstances.

The findings and recommendations were refined with the input of leading European and Turkish experts during a scenario workshop held at the Martens Centre in April 2026. The authors would like to express their sincere thanks to all participants for their open and constructive discussions and inspiring contributions. Responsibility for the analysis and recommendations contained in this report rests solely with the authors. The views expressed do not necessarily reflect the official position of the Wilfried Martens Centre for European Studies.

Our approach

Acknowledging the complexity of internal and external factors shaping the nature and direction of EU–Türkiye relations, we develop two scenarios exploring plausible futures for the relationship over the medium term, up to 2035. This method is increasingly often applied to the design of strategic policies under

conditions of uncertainty.[10] The year 2035 will mark the thirtieth anniversary of the formal opening of accession negotiations with Türkiye. It will also be a critical juncture in the EU's own institutional and political evolution, shaped by internal reform, external challenges and the prospect of further enlargement.

The scenarios were developed along two principal dimensions: (1) the degree of strategic and security alignment and (2) the depth of economic and societal integration. Beyond these two axes, two broader conditioning factors will influence the direction, scope and substance of EU–Türkiye relations over the coming decade. The first is domestic political developments in Türkiye, particularly regarding the rule of law, democratic governance and fundamental rights, which will continue to shape the scope of political and institutional engagement. The second is the EU's own profound transformation. The renewed enlargement agenda following Russia's invasion of Ukraine, preparations for a Union of more than thirty member states, debates on institutional reform and gradual integration, and efforts to strengthen the EU's defence, industrial and competitiveness agendas within a changing security architecture will all reshape the framework within which relations with Türkiye evolve. Together, these developments will create both opportunities and constraints, and act as important conditioning factors shaping the trajectory of EU–Türkiye relations under either scenario.

Given sufficient reasons to believe that a complete rupture of the relationship is unlikely, we have therefore not included this option as a separate scenario. Nevertheless, we consider the potential factors and costs of further alienation within both scenarios.

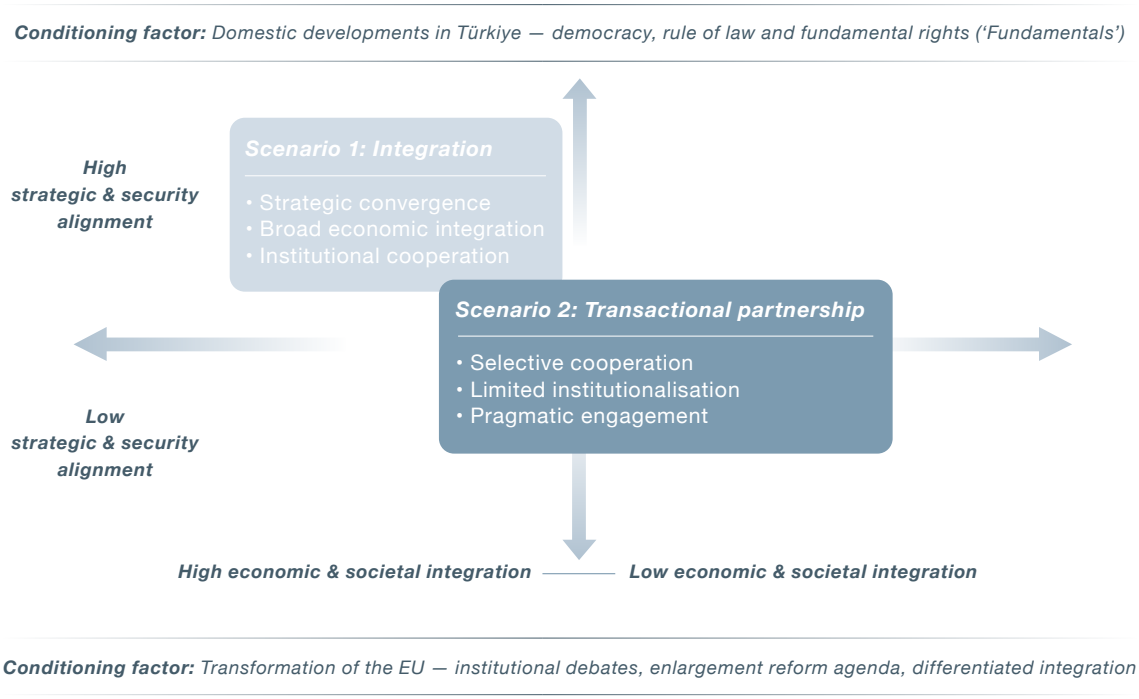
The following two sections are structured as follows:

- *Starting points and trajectories*. We outline the starting points and possible trajectories of EU–Türkiye relations along the two axes of alignment and integration (see Figure 1). In doing so, we look beyond intergovernmental relations to examine the interplay of various factors and shed light on the positive or negative interactions possible between these different areas.
- *Key dynamics and policy implications*. Each scenario identifies key dynamics, potential inflection points and early warning signals. The policy recommendations are then consolidated in the 'Recommendations' section, where they are organised according to their applicability across both scenarios and their relevance to each specific pathway.

10 M. Dean, *Scenario Planning: A Literature Review*, University College London (London, 2019).

- *Overlapping scenarios*. We recognise that the two scenarios are not mutually exclusive and may overlap to a significant extent. Consequently, several policy recommendations and instruments may be relevant and applicable under both scenarios.

Figure 1 Dimensions of EU–Türkiye relations



Source: Authors' own creation.

Scenarios

Option 1: deeper European integration

Scenario

Uncertainties and concerns about the rule of law in Türkiye's domestic political trajectory persist and are unlikely to be substantially resolved in the coming years. Within the EU, political support remains low for restarting accession processes with the clear objective of Türkiye's full membership, while the accession of other candidate countries, particularly those in the Western Balkans, as well as

Moldova and Ukraine, takes priority. Nevertheless, the accession prospect per se remains open, continuing to serve as an institutional and normative benchmark.

Shared external challenges, including the increasingly volatile security environment in the Black Sea and the Caucasus, the Mediterranean and the Middle East, alongside domestic pressures arising from the green and digital transitions, strengthen the case for more comprehensive and structured integration. The greatest potential lies in security and defence, economic and regulatory governance, innovation ecosystems and mobility.

Different strategic perceptions and interests persist, particularly regarding the Eastern Mediterranean, the Middle East and Central Asia. However, these do not fundamentally inhibit cooperation, as the core interests of both sides remain broadly aligned. Sustained pressure from the political opposition, civil society and the EU contributes to considerable improvements and greater predictability in Türkiye's governance and legal system. This, in turn, eases tensions with the EU and broadens the domestic support and political legitimacy of EU actors seeking to defend and deepen engagement with Türkiye. Citizens and businesses on both sides begin to see tangible benefits, including improved cooperation and better access to markets. These developments generate a positive, self-reinforcing dynamic towards more institutionalised structures of cooperation, thereby raising the political and financial costs of disengagement for both parties.

Key indicators to monitor

The following key indicators must be monitored closely:

- the extent to which structured, high-level political dialogue translates into concrete sectoral outcomes that deliver tangible benefits for citizens and businesses in both the EU and Türkiye,
- the significant expansion of Türkiye's participation in EU programmes and initiatives, including relevant EU and member state frameworks, particularly in R&D and the green and digital transitions, thereby enlarging the basis for sustainable and diversified economic growth,
- the degree of alignment of Turkish legislation and regulatory practice with EU standards and procedures, including the effective implementation of rules and the use of dispute-settlement mechanisms, and

- measurable progress in aligning Türkiye's governance frameworks and practices with rule-of-law standards, which underpin the EU accession process, comparable to the requirements applied to other candidate countries.

Option 2: transactionalism

Scenario

Here, EU–Türkiye relations remain pragmatic and interest-driven. The lack of progress on the rule of law, combined with an increasingly repressive domestic political environment in Türkiye, limits political support and space for deeper engagement and further investment in the relationship on both sides. Strategic interests continue to diverge on issues such as the future of Cyprus, developments in the Middle East and relations with Russia, remaining potential sources of tension, between Türkiye and both the EU as a whole and certain individual member states. There might be a short-lived overlap of interests, but underlying distrust and divergent strategic objectives prevent long-term institutionalisation or deeper integration.

Both sides increasingly compartmentalise their relations, allowing cooperation to advance selectively in areas of immediate mutual interest, while broader political convergence remains elusive. The relationship is thus characterised by functional pragmatism rather than strategic trust. Although this model may provide short-term flexibility, it also leaves cooperation vulnerable to bilateral crises, domestic political developments and geopolitical tensions, which may spill over into economic and institutional relations.

In the political sphere, maintaining the status quo is widely regarded as the most plausible outlook for the foreseeable future, particularly as normative concerns on the EU side over governance and the rule of law in Türkiye constrain political support for closer cooperation. Defence remains a potential exception, with shared security interests creating scope for more substantive engagement. At the same time, limited new opportunities for societal contacts and business exchanges continue to emerge. Driven by the need for economic diversification, improved market access and the expectations of younger generations, economic and regulatory convergence advances in selected areas, especially in trade, customs facilitation and supply chains. Yet, as these developments are driven primarily by short-term interests rather than a longer-term vision of integration, the relationship remains limited in scope, superficial and below its potential, despite being useful for both sides. In addition, the transactional nature of

this relationship leaves it structurally fragile and vulnerable to political and geopolitical shifts.

Key indicators to monitor

The following developments should be monitored as potential indicators of a predominantly transactional EU–Türkiye relationship:

- progress in sectoral economic agreements in the absence of corresponding political dialogue or institutionalised cooperation in parallel,
- crisis-driven security cooperation that fails to evolve into sustained and structured dialogue,
- increasing politicisation or use of economic instruments as leverage during periods of bilateral tension,
- domestic political developments triggering resistance within the European Parliament and/or among EU member states, thereby constraining deeper cooperation,
- stagnation or gradual erosion of formal EU–Türkiye institutional mechanisms, leading to greater reliance on ad hoc crisis management,
- diverging strategic priorities in the Eastern Mediterranean, the Middle East and the Black Sea region undermining efforts to establish or sustain cooperation frameworks, and
- recurring political flare-ups that periodically undermine the stability of transactional cooperation arrangements.

Recommendations

The recommendations are organised into three layers. First, the section identifies robust measures that should be pursued regardless of whether EU–Türkiye relations evolve towards deeper integration or remain predominantly transactional. Second, it outlines recommendations for Option 1, which seeks to advance institutionalisation, regulatory convergence and long-term strategic alignment. Third, it proposes recommendations for Option 2, which prioritises preserving

functional cooperation, reducing the risk of escalation and preventing further strategic drift.

General recommendations for both options

Several policy instruments are relevant under both scenarios. These should be understood as 'no-regret' measures: they do not require a grand political bargain, but could help stabilise the relationship, preserve channels of cooperation and create opportunities for future upgrading.

1. *Reactivate and upgrade existing institutional formats.* The EU and Türkiye should make fuller use of existing institutional frameworks, including the Association Council and relevant technical subcommittees. Complementing these connections should be a regular strategic coordination mechanism involving the European Commission, the European External Action Service and their relevant Turkish counterparts. This mechanism should involve regular meetings to address security, economic cooperation, innovation, mobility, migration and crisis management. Its purpose should not be to replace existing structures, but to make them more predictable, operational and politically meaningful.

2. *Adopt a modular architecture for cooperation.* EU–Türkiye cooperation should follow a modular 'plug-in' logic, allowing progress in one field without being automatically blocked by a stalemate in another, provided that basic legal requirements and essential political conditions are respected. Such a model would allow practical cooperation in areas such as customs facilitation, research, connectivity, the green transition, migration management or cyber resilience, while keeping these modules interoperable and ensuring coherence. Over time, successful cooperation in one field could generate spillovers into others.

3. *Establish clear benchmarks and apply proportionality.* Sensitive issues such as the rule of law, fundamental rights, sanctions compliance and legal predictability should be addressed through clear and observable benchmarks rather than an exclusively all-or-nothing approach to cooperation. The EU and Türkiye should define a limited number of relevant benchmarks and link progress to proportionate forms of engagement. These could cover judicial independence, the implementation of European Court of Human Rights judgments, legal predictability for investors, anti-corruption measures, public procurement, space for civil society, sanctions compliance and export controls. Such an approach should preserve the distinction between practical cooperation and the EU's fundamental commitments to democracy, the rule of law and human rights.

4. *Create an early warning and crisis management mechanism.* Both sides should establish a joint early warning mechanism covering hybrid threats, migration pressures, regional escalation, supply-chain disruptions, vulnerabilities in critical infrastructure and the politicisation of economic instruments. This should be accompanied by pre-agreed response options and clear communication channels, distinguishing routine strategic dialogue from rapid-response crisis consultations.

5. *Pursue a phased economic cooperation package.* Economic cooperation should begin with low-political-cost measures, such as customs facilitation, regulatory and standards cooperation, improved dispute handling, greater transparency in regulatory procedures and closer communication between administrations. More politically sensitive steps, including the broader modernisation of the Customs Union, should be the next logical step, linked to measurable progress in legal predictability and regulatory alignment. A phased approach would allow both sides to demonstrate tangible benefits while building the conditions for more ambitious cooperation.

6. *Strengthen investment-risk mitigation and legal predictability.* The EU and Türkiye should establish a joint investment-risk mitigation channel for addressing concerns related to regulatory transparency, dispute settlement, arbitration and legal certainty. This would help maintain business confidence even during periods of political tension and reduce the risk of exposure of economic actors to sudden regulatory changes or the politicisation of economic relations.

7. *Prioritise critical infrastructure and connectivity resilience.* The EU and Türkiye should deepen cooperation on energy interconnectors, transport and logistics corridors, digital infrastructure and other forms of critical connectivity. These links are increasingly important not only for trade but also for Europe's economic security, diversification and resilience. Such cooperation should follow a resilience-by-design approach, addressing supply-chain security, cybersecurity risks and geopolitical vulnerabilities, while building on existing frameworks and initiatives where possible, to avoid unnecessary duplication. Predictable regulatory frameworks and alignment with shared strategic interests will be essential to unlocking the full potential of these connectivity links.

8. *Maintain migration cooperation within a structured framework.* Migration should be addressed through a predictable and comprehensive dialogue covering border management, humanitarian obligations, refugee support, legal geographical routes, crisis prevention and transparent funding arrangements. A more structured approach would help ensure continuity, clarify mutual

responsibilities and reduce the risk of migration becoming an instrument of short-term political bargaining.

9. *Preserve and strengthen societal, academic and municipal links.* People-to-people contacts should be treated as a strategic asset. Academic and youth exchanges, city partnerships, professional associations and civil-society cooperation can sustain mutual understanding and provide continuity when high-level political relations come under strain. These links should be preserved and expanded under both scenarios, including through existing EU programmes and bilateral initiatives.

10. *Improve public communication and democratic legitimacy.* Both sides should communicate the practical benefits and limitations of cooperation more clearly to citizens and businesses. Such communication should avoid creating unrealistic expectations about accession while also avoiding a purely transactional framing that ignores the normative and strategic dimensions of the relationship. Transparent communication about objectives, conditions and outcomes would help strengthen public understanding and the legitimacy of continued engagement.

Recommendations for Option 1: deeper European integration

Under the deeper integration scenario, the objective should be to translate existing interdependence into a more institutionalised, predictable and strategically aligned relationship. This does not require the immediate reopening of the full accession path as a political priority, but it does require a credible framework for advancing cooperation while preserving the prospect of EU accession as a normative and institutional benchmark.

1. *Develop a staged integration roadmap.* The EU and Türkiye should develop a staged roadmap for deeper sectoral integration. This roadmap should define concrete milestones, benchmarks, incentives and review mechanisms. It should cover economic cooperation, regulatory alignment, innovation, mobility, security and resilience. The purpose would be to create a structured path for gradual convergence without pretending that full membership is politically imminent.

2. *Advance the phased modernisation of the Customs Union*. Given that the existing Customs Union dates back to 1995 and no longer adequately reflects the scope and complexity of EU–Türkiye economic relations and trade volumes, the launch of formal modernisation negotiations would be a rational next step

under this scenario. These negotiations could provide a framework for addressing outstanding issues and defining a phased modernisation process. Initial steps should focus on customs facilitation, dispute settlement, standards cooperation and regulatory transparency. More ambitious extensions to areas such as services, agriculture, public procurement and digital trade should be incorporated into the negotiations and pursued in stages, supported by measurable progress in legal predictability, regulatory alignment and effective dispute-resolution mechanisms.

3. *Expand Türkiye's participation in selected EU programmes*. Türkiye's participation in EU and member-state programmes should be expanded in areas in which alignment with EU rules and governance standards can be ensured. Priority areas include research and innovation, digital transformation, the green transition, skills development, industrial decarbonisation and academic cooperation. Such participation would create practical incentives for convergence and increase the political cost of disengagement.

4. *Establish an EU–Türkiye green and industrial transition taskforce*. A dedicated taskforce should focus on adaptation to the Carbon Border Adjustment Mechanism, industrial decarbonisation, energy efficiency, clean technologies, sustainable supply chains, and compatible reporting and verification systems. This would help align Türkiye's industrial transformation with the EU's green and competitiveness agendas and could reduce future regulatory frictions.

5. *Build a targeted R&D and innovation portfolio*. The EU and Türkiye should develop a joint portfolio of research and innovation projects in areas such as clean technologies, health technologies, energy efficiency, AI standards, digital governance and industrial transformation. Clear governance rules, intellectual-property safeguards and university–business cooperation should be built into this portfolio from the outset.

6. *Develop structured mobility schemes and advance visa liberalisation*. Mobility should become a key pillar of deeper integration. The EU and Türkiye should expand structured mobility schemes for students, researchers, entrepreneurs, technical specialists and skilled professionals. Trusted-institution schemes, multiannual programming and more consistent visa practices across EU member states would make mobility more predictable while addressing legitimate security and migration-related concerns within the EU. In this scenario, a central objective should be to achieve visa liberalisation once Türkiye has fulfilled the remaining benchmarks under the EU visa liberalisation roadmap. This would address a long-standing source of friction in EU–Türkiye relations and bring Turkish

citizens closer to the mobility arrangements enjoyed by all the other candidate countries' citizens, reinforcing the credibility of the prospect of accession.

7. *Support regulatory and technical standards convergence*. Technical standards and regulatory dialogue should be strengthened in areas such as AI and data governance, sustainability reporting, corporate social responsibility, customs procedures, industrial standards and digital services. The objective should be interoperability and gradual convergence, not necessarily full harmonisation in every field.

8. *Deepen defence, security and resilience cooperation*. Shared external threats should serve as a driver for more structured security cooperation beyond the NATO framework. Priority areas include Black Sea and South Caucasus security, maritime awareness, critical infrastructure protection, information sharing, cyber resilience, hybrid threats and crisis preparedness. In this scenario, the EU could reconsider the scope for Türkiye's participation in the Security Action for Europe instrument, in terms of the applicable legal and eligibility requirements, as part of a broader effort to strengthen defence-industrial cooperation. More structured engagement should also address the concerns and sensitivities of EU member states and remain consistent with EU legal standards, data-protection requirements and security interests.

9. *Develop a defence-industrial risk framework*. The EU and Türkiye should identify areas where defence-industrial cooperation is feasible, such as maintenance, logistics, standards, resilience technologies and selected industrial capabilities. At the same time, sensitive areas involving dual-use technologies, export controls and high-security information should be clearly defined to avoid ad hoc politicisation.

10. *Strengthen sanctions compliance and export-control alignment*. In an integration scenario, technical dialogue on sanctions circumvention should move towards more systematic alignment of customs procedures, export controls and financial monitoring practices. This would reduce reputational risks, increase trust and support broader strategic alignment.

11. *Build a broader architecture for civil-society and municipal cooperation*. Civil-society, municipal, academic and professional cooperation should not be treated merely as a fallback mechanism. Under the integration scenario, these links should become part of a broader fabric of institutionalised cooperation that increases societal ownership of the relationship.

Recommendations for Option 2: transactionalism

Under the transactional scenario, the aim should not be to replicate the structures of deeper integration in the absence of the necessary political conditions. Instead, the priority should be to preserve functional cooperation, establish guardrails, prevent escalation and maintain channels of dialogue that could facilitate future re-engagement.

1. *Preserve functional cooperation in strategically relevant sectors*. Even in the absence of broader political convergence, the EU and Türkiye should maintain cooperation in areas of clear mutual interest, including trade, migration, energy, infrastructure, sanctions compliance, crisis deconfliction and selected security issues. Such cooperation should be pragmatic, but not unstructured.

2. *Develop sector-specific guardrails*. Each major field of cooperation should be protected by clear procedural guardrails. This is particularly important for customs and trade, migration, energy, infrastructure, sanctions compliance, defence-sensitive technologies, digital standards and critical supply chains. These guardrails should reduce the risk that political disputes automatically paralyse functional cooperation.

3. *Strengthen legal predictability and dispute-settlement mechanisms*. A transactional relationship will remain fragile unless economic actors have confidence in legal and regulatory procedures. The EU and Türkiye should therefore prioritise dispute settlement, confidence in arbitration, transparent administrative procedures and clear communication between regulatory authorities.

4. *Create crisis firewalls*. Political disputes should not automatically spill over into customs cooperation, migration management, research exchanges, business relations or technical regulatory dialogue. Crisis firewalls should be established to preserve minimum cooperation even during periods of diplomatic tension.

5. *Maintain structured dialogue on sensitive geopolitical issues*. Even where strategic priorities diverge, structured dialogue should continue on issues such as the Eastern Mediterranean, Cyprus-related tensions, Black Sea security, developments in the Middle East, migration, sanctions circumvention and Russia-related risks. The purpose should be escalation control rather than full strategic alignment.

6. *Use calibrated conditionality and targeted incentives*. The EU should avoid both maximalist demands that foreclose practical progress and unconditional transactionalism that undermines its political credibility. Instead, it should

pursue clearly defined, economically meaningful objectives linked to transparent eligibility criteria and measurable progress. Türkiye's potential participation in the Single Euro Payments Area, for example, illustrates how a concrete objective can provide a focus for technical and regulatory cooperation, subject to the applicable requirements. This would allow tangible progress where conditions permit, while maintaining clear expectations and preserving the EU's political credibility.

7. *Diversify cooperation beyond executive-level diplomacy*. Transactionalism becomes particularly fragile when the relationship depends only on executive-level bargaining. Business associations, universities, municipalities, technical agencies and professional organisations should therefore be included more systematically in cooperation formats.

8. *Protect people-to-people links against political volatility*. Academic, youth, cultural and civil-society exchanges should be preserved even when high politics stall. In a transactional scenario, these links are essential to prevent long-term societal decoupling and to keep open the possibility of future strategic re-engagement.

9. *Develop contingency plans for sudden escalation*. The EU and Türkiye should prepare contingency plans for scenarios such as regional military incidents, migration pressure, economic coercion, sanctions circumvention risks, cyber-attacks or the suspension of political dialogue formats. Such planning should not be interpreted as pessimism, but as a necessary instrument for managing a fragile relationship.

10. *Clearly define conditions for gradual re-engagement*. Even under transactionalism, both sides should avoid becoming locked into a pattern of permanent stagnation. The EU should clearly articulate the conditions under which cooperation could be gradually expanded and upgraded, particularly in areas such as the rule of law, legal predictability, sanctions compliance and regional de-escalation. Clear benchmarks and a credible pathway for progress would help preserve incentives for reform, provide greater predictability for both sides and keep open the possibility of a broader rapprochement should political conditions improve.

Conclusion

This policy brief develops two broad scenarios for EU–Türkiye relations by 2035: deeper European integration and transactional partnership. These scenarios are not framed as a simple dichotomy between 'good' and 'bad' outcomes, but as distinct political trajectories with different implications for both sides. Using an approach that engages foresight, the brief explores plausible pathways for the relationship amid geopolitical uncertainty and domestic transformation in both the EU and Türkiye.

Importantly, the two scenarios should not be understood simply as representing 'more cooperation' versus 'less cooperation'. Rather, they reflect fundamentally different political logics. The first is driven by an integration logic centred on long-term convergence, institutionalisation, resilience, predictability and strategic alignment. The second follows a management logic characterised by selective engagement, compartmentalisation, crisis bargaining, limited trust and tactical coordination. The central strategic question for the coming decade is therefore not whether cooperation will continue, but under which political logic it will evolve.

A return to the optimism surrounding the 1999 Helsinki European Council or the political atmosphere of the early 2000s seems highly unlikely in the near term. Yet the depth of the geopolitical, economic and societal interdependence between the two sides makes long-term disengagement equally improbable. Deeper integration would require gradual trust-building, institutional innovation and renewed political commitment on both sides. A predominantly transactional relationship, by contrast, could sustain cooperation in selected areas but would remain structurally fragile and vulnerable to political and geopolitical shocks. The challenge is to avoid both unrealistic expectations of rapid rapprochement and an overly narrow transactional approach that leaves the relationship vulnerable to recurring crises.

The EU and Türkiye will increasingly operate within a shared strategic environment shaped by security instability, technological transformation, economic competition and mounting pressures on democratic resilience. Preserving and strengthening channels of cooperation while preventing further strategic drift should therefore remain a shared priority. This will require not only pragmatic coordination in areas of mutual interest, but also a willingness to address the political and institutional conditions that constrain closer engagement.

Ultimately, the future of EU–Türkiye relations will depend on whether both sides can transform existing interdependence into a more resilient, strategic, and forward-looking relationship that moves beyond reactive pragmatism and managed ambiguity. The choice is not between immediate integration and disengagement, but between a framework that gradually builds the conditions for deeper cooperation and one that manages interdependence without overcoming its underlying fragilities.

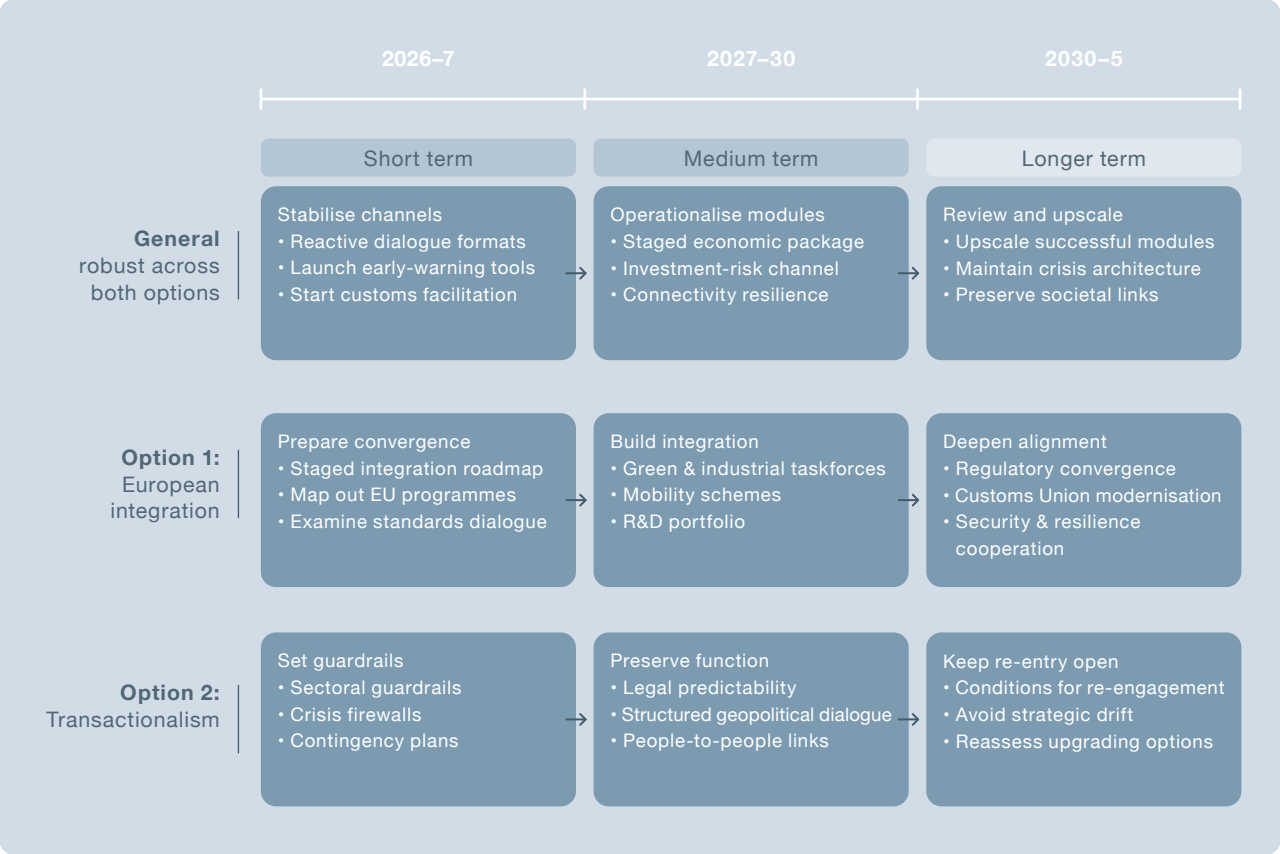
Appendix: Synopsis

Table A1 Overview of scenarios

Dimension	Scenario 1: deeper integration	Scenario 2: transactionalism
Economy	• **Develop a staged integration roadmap** linking economic cooperation, regulatory alignment and institutional benchmarks. • **Advance phased Customs Union modernisation**, starting with customs facilitation, dispute settlement and standards cooperation, followed by possible extensions to services, agriculture, public procurement and digital trade. • **Strengthen regulatory convergence** through clearer dispute-resolution mechanisms, legal predictability and alignment with EU standards. • **Establish a green and industrial transition taskforce** focused on compliance with the Carbon Border Adjustment Mechanism, industrial decarbonisation, sustainable supply chains and compatible reporting systems. • **Expand investment and connectivity cooperation** in energy interconnectors, logistics corridors, digital infrastructure and supply-chain resilience.	• **Preserve functional economic cooperation** in areas of clear mutual interest, especially trade facilitation, customs procedures, supply chains and connectivity. • **Develop sector-specific economic guardrails** to prevent political disputes from paralysing trade, customs cooperation or investment relations. • **Strengthen legal predictability and dispute-settlement mechanisms** to reduce risk perceptions among companies and investors. • **Create an investment-risk mitigation channel** focused on arbitration confidence, regulatory transparency and administrative predictability. • **Use targeted incentives** to achieve concrete improvements in legal predictability, sanctions compliance and technical cooperation.

Dimension	Scenario 1: deeper integration	Scenario 2: transactionalism
Innovation and technology	• **Expand Türkiye's participation in selected EU and member-state programmes** in research, digital transformation, the green transition, skills and industrial innovation. • **Build a targeted R&D and innovation portfolio** in clean technologies, energy efficiency, health technologies, AI standards, digital governance and industrial transformation. • **Support technical standards and regulatory convergence** in AI, data governance, corporate social responsibility, sustainability reporting, digital services and industrial standards. • **Promote university–business cooperation** with clear governance rules, protection of intellectual property and long-term institutional partnerships. • **Use innovation cooperation as a driver of gradual convergence** and as a practical incentive for deeper integration.	• **Maintain selective technology cooperation** where interests overlap, especially in digital standards, energy efficiency, industrial upgrading and resilience technologies. • **Set up technical dialogues focused on interoperability rather than full harmonisation**, particularly in AI, data governance and digital regulation. • **Protect cooperation through clear legal and data-governance safeguards**, especially where trust remains limited. • **Diversify cooperation channels** through universities, technical agencies, business associations and professional networks. • **Prevent technological decoupling** by preserving low-risk R&D, academic and technical exchanges even during political tensions.
Mobility and people-to-people contacts	• **Develop structured mobility schemes** for students, researchers, entrepreneurs, technical specialists and skilled professionals. • **Introduce trusted-institution and trusted-traveller mechanisms** to make mobility more predictable while addressing EU domestic concerns. • **Promote more consistent visa practices across member states** for clearly defined academic, professional and innovation-related categories. • **Expand academic, youth and civil-society exchange programmes** through multi-annual programming and diversified partners. • **Build a broader civil-society and municipal cooperation architecture** involving cities, universities, professional associations and local actors.	• **Protect people-to-people links against political volatility** to prevent long-term societal decoupling. • **Maintain academic, youth and cultural exchanges** even when high-level political dialogue stalls. • **Strengthen bottom-up cooperation** through businesses, universities, municipalities, technical agencies and professional associations. • **Use mobility schemes in a risk-managed way**, with enhanced verification and trusted institutions where politically necessary. • **Preserve societal channels as future re-engagement infrastructure**, rather than treating them as symbolic add-ons.

Figure A1 Implementation roadmap: three tracks, three horizons



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