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**Türkiye 2025 Report**

*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**

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## Contents

1. Introduction .....	2
1.1. Context .....	2
1.2. Main findings of the report.....	3
2. Cluster 1: The fundamentals of the accession process.....	18
2.1. Functioning of democratic institutions and public administration reform .....	18
2.1.1. Democracy .....	18
2.1.2. Public administration reform .....	24
2.2. Rule of law and fundamental rights .....	26
2.2.1 Chapter 23: Judiciary and fundamental rights.....	26
2.2.2 Chapter 24: Justice, freedom and security .....	41
2.3. Economic criteria .....	51
2.3.1. The existence of a functioning market economy.....	51
2.3.2. The capacity to cope with competitive pressure and market forces within the Union .....	55
2.4. Public procurement, statistics, financial control .....	57
Chapter 5: Public procurement.....	57
Chapter 18: Statistics .....	59
Chapter 32: Financial control.....	60
3. Good neighbourly relations and regional cooperation.....	61
4. Ability to assume the obligations of membership .....	66
Cluster 2: Internal Market.....	66
Chapter 1: Free movement of goods .....	66
Chapter 2: Freedom of movement for workers.....	68
Chapter 3: Right of establishment and freedom to provide services .....	69
Chapter 4: Free movement of capital .....	69
Chapter 6: Company law .....	71
Chapter 7: Intellectual property law .....	71
Chapter 8: Competition policy .....	72
Chapter 9: Financial services.....	73
Chapter 28: Consumer and health protection .....	74
Cluster 3: Competitiveness and inclusive growth.....	75
Chapter 10: Digital transformation and media.....	76
Chapter 16: Taxation.....	77
Chapter 17: Economic and monetary policy.....	78
Chapter 19: Social policy and employment .....	79

Chapter 20: Enterprise and industrial policy .....	81
Chapter 25: Science and research.....	82
Chapter 26: Education and culture .....	83
Chapter 29: Customs Union .....	85
Cluster 4: The green agenda and sustainable connectivity .....	86
Chapter 14: Transport policy .....	86
Chapter 15: Energy.....	87
Chapter 21: Trans-European networks.....	89
Chapter 27: Environment and climate change .....	90
Cluster 5: Resources, agriculture and cohesion.....	91
Chapter 11: Agriculture and rural development.....	91
Chapter 12: Food safety, veterinary and phytosanitary policy.....	92
Chapter 13: Fisheries and aquaculture .....	92
Chapter 22: Regional policy and the coordination of structural instruments .....	93
Chapter 33: Financial and budgetary provisions .....	94
Cluster 6: External relations.....	95
Chapter 30: External relations .....	95
Chapter 31: Foreign, security and defence policy .....	96
Annex I – Relations between the EU and Türkiye.....	103
Annex II – Statistical data .....	106

## 1. INTRODUCTION<sup>1</sup>

### 1.1. CONTEXT

Türkiye is a key partner for the European Union and a candidate country. In December 2024, the Council<sup>2</sup> restated the EU's strategic interest in a stable and secure environment in the Eastern Mediterranean and in the development of a cooperative and mutually beneficial relationship with Türkiye. The Council stressed again that the EU attaches particular importance to resumption of and progress in the Cyprus settlement talks in further enhancing EU-Türkiye cooperation. Both the EU and Türkiye pursue re-engagement in areas of mutual interest, in line with the recommendations of the Joint Communication on EU-Türkiye relations of 23 November 2023<sup>3</sup> and the relevant European Council Conclusions. The EU is re-engaging constructively with Türkiye in a phased, proportionate and reversible manner, subject to established conditionalities; high-level engagement continued in areas of joint interest<sup>4</sup>.

Accession negotiations with Türkiye have remained at a standstill since 2018, as reiterated by the Council Conclusions of December 2024. The EU's serious concerns about the continued deterioration of democratic standards, the rule of law, the independence of the judiciary and respect for fundamental rights were not addressed. The arrests of and charges brought against elected officials, opposition figures, political activists, civil society and business representatives, journalists, and others since the beginning of 2025, gave rise to increasing questions regarding Türkiye's adherence to its democratic tradition, and deepened concerns about the independence of the judiciary.

The 2016 EU-Turkey Statement continued to yield results and remained the key framework for cooperation on migration. Türkiye sustained its remarkable efforts to host 2.7 million refugees including Syrians under temporary protection. The EU has mobilised EUR 12.5 billion to support refugees and host communities since 2011. The EU continued to provide assistance in areas such as basic needs, border management, education, healthcare, protection and socio-economic support. On the economic side, Türkiye remained the EU's fifth largest trading partner in 2024, with trade reaching a record high of over EUR 210 billion. Türkiye has also asserted an increasingly active and multi-layered foreign policy. Increasing geopolitical challenges underscored its strategic regional role, particularly in relation to developments in Syria, Ukraine, Gaza and South Caucasus.

Since 2023, bilateral relations between Türkiye and Greece have improved, with Türkiye not engaging in any unauthorised drilling activities in the Eastern Mediterranean or in flights over Greek islands. Türkiye continued to refuse to recognise the Republic of Cyprus and

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<sup>1</sup> This report covers the period from 1 September 2024 to 1 September 2025. It is based on input from a variety of sources, including contributions from the government of Türkiye, EU Member States, European Parliament reports and information from various international and non-governmental organisations. It also includes the results of comparative assessments and indices produced by other stakeholders, in particular in the area of rule of law.

The report uses the following assessment scale to describe the state of play: early stage, some level of preparation, moderately prepared, good level of preparation and well advanced. To describe progress made during the reporting period, it uses the following scale: backsliding, no progress, limited progress, some progress, good progress and very good progress. Where appropriate, interim steps have also been used.

<sup>2</sup> During the reporting period, the Council of the EU adopted Conclusions concerning Türkiye on 17 December 2024.

<sup>3</sup> JOIN(2023) 50 final

<sup>4</sup> The EU-Türkiye High-Level Dialogue on Economy took place in April 2025; the EU-Türkiye High-Level Dialogue on Trade and High-Level Dialogue on Migration and Security took place in July 2025; and the EU-Türkiye High-Level Dialogue on Climate took place in October 2025.

repeatedly advocated a two-state solution in Cyprus, contrary to relevant UN Security Council Resolutions.

## 1.2. MAIN FINDINGS OF THE REPORT

### CLUSTER 1: THE FUNDAMENTALS OF THE ACCESSION PROCESS

#### Democracy

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The general framework of the **elections** ensures free choice between alternative political options but does not provide a level playing field for all political stakeholders. Excessive judicial pressure on opposition politicians stifles political competition, thereby undermining fundamental democratic principles. Türkiye has not implemented the recommendations to improve the election process issued by the Office for Democratic Institutions and Human Rights of the Organization for Security and Co-operation in Europe and the Council of Europe's European Commission for Democracy through Law (Venice Commission).

While the **Parliament** formally has powers – including control of the executive and involvement in the legislative process, it can exercise them only in a constrained way. The highly centralised presidential system, which has seriously weakened Parliament's prerogatives and the separation of powers, remained in place.

The system lacks effective checks and balances, and the tools needed to hold the **government** accountable beyond elections. Most regulatory authorities remain directly linked to the Presidency, and public administration is highly politicised. Local democracy was further weakened as elected opposition mayors were prosecuted and removed, with some being replaced by government-appointed trustees.

The institutions in charge of the EU **integration** process are in place, and are well staffed and effective.

**Civil society organisations** (CSOs) continue to operate in a difficult and increasingly restrictive environment. The civic space has further shrunk due to sustained judicial and administrative pressures from the authorities, hindering the work of CSOs. Despite this, civil society continued to be vocal and participates actively in civic life, making crucial contributions in several areas. Türkiye needs to ensure that independent CSOs are effectively consulted on new legislation and policies.

#### Public administration reform

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Türkiye is **between having some and a moderate level of preparation** and made **no progress** in the reporting period.

The Commission's recommendations from last year were not implemented and remain valid. In the coming year, Türkiye should in particular:

- prepare and adopt an overarching strategy for public administration and public financial management reform in line with the EU principles and after extensive consultations;
- introduce merit-based recruitment, appointments and promotions, notably to senior positions;
- review the policymaking process to achieve inclusive and evidence-based methods of preparing policy planning documents and legislative proposals.

#### Chapter 23: Judiciary and fundamental rights

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Türkiye remains at an **early stage of preparation** in the area of the rule of law and

fundamental rights. **Backsliding** occurred on key issues identified in previous reports and the serious concerns noted in previous reports heightened.

### ***Functioning of the judiciary***

Türkiye's judiciary is still at an **early stage of preparation** and **backsliding** resumed. Fundamental systemic shortcomings were not addressed. The judiciary continues to remain under the control of the executive, affecting the independence and compromising the quality of judicial outcomes. The judiciary has repeatedly acted selectively, targeting opposition figures and elected officials, while refraining from pursuing similar action against the ruling coalition's officials. This dynamic casts doubt on the impartiality of judicial proceedings and brought public trust in the legal system down to an all-time low. The judicial system still failed to implement certain judgments of the European Court of Human Rights (ECtHR), while several courts refused to implement rulings of the Turkish Constitutional Court, undermining the integrity and the functioning of the entire system.

The European Commission's prior recommendations for addressing these issues still need to be implemented and therefore remain valid and are considered even more urgent. In the coming year, Türkiye should focus on the following areas:

- create a political and legal environment in line with European standards that allows the judiciary to carry out its duties independently and impartially, strengthen the separation of powers, and ensure that lower courts respect judgments by the Constitutional Court, whose decisions should abide by ECtHR jurisprudence;
- amend the structure and selection processes of the Council of Judges and Prosecutors (HSK) so that the role and influence of the executive is limited, and introduce safeguards against interference by the HSK or senior officials in judicial proceedings;
- ensure that all judicial proceedings respect fundamental rights, with a special emphasis on victims and procedural protection for suspects and accused persons, duly guarantee the presumption of innocence, the principles of individual criminal responsibility and legal certainty, the right of defence, and the right to a fair trial.

### ***Fight against corruption***

Türkiye is still at an **early stage of preparation** in the fight against corruption and **no progress** was made in the reporting period. The country has neither created a framework for the prevention and control of corruption, nor set up anti-corruption bodies in accordance with the Council of Europe's Civil and Criminal Law Conventions on Corruption, the Group of States against Corruption (GRECO) recommendations, and the UN Convention against Corruption. The legal framework and institutional structure require improvement to limit undue political influence in prosecuting and adjudicating corruption cases. During the reporting period, several high-level corruption cases were launched against opposition-elected mayors in major cities and districts, while no investigation was launched against current or former elected officials from the ruling party in large cities. These selective investigations/prosecutions do not ensure trust in the effectiveness of the authorities' fight against corruption. An effective fight against corruption requires clear political guidance, together with independent, accountable, transparent and effective public institutions, starting with investigative and judicial bodies. Progress in the fight against corruption is therefore also hampered by the lack of independence of the judiciary. Targeted risk assessments and specific measures are also needed to address corruption in the most vulnerable sectors.

The Commission's recommendations from last year were not implemented and remain valid. In the coming year, Türkiye should in particular:

- implement its international obligations in relation to the fight against corruption, in particular the UN Convention against Corruption and the relevant Council of Europe Conventions;
- ensure effective follow-up to the recommendations issued by GRECO, including by adopting the necessary legislation, as indicated in the EU-Turkey Visa Liberalisation Roadmap;
- develop an anti-corruption strategy that reflects a clear political will and vision to effectively address corruption, underpinned by a credible and realistic action plan.

### ***Fundamental rights***

The overall human rights situation in the country deteriorated. While the Turkish legal framework provides general guarantees for the respect of human and fundamental rights, parts of Türkiye's legislation and its implementation are not in line with the European Convention on Human Rights (ECHR) and ECtHR case law. Investigations, prosecutions and convictions of journalists, writers, lawyers, academics, human rights defenders and other critical voices for alleged support for terrorism intensified in the reporting period. For the first time in several years, a sitting chair of a legal political party was prosecuted for his public speeches. Judicial action against opposition politicians continued, and investigations were launched against one opposition political party.

The Commission's recommendations from last year were not implemented and remain valid. In the coming year, Türkiye should in particular:

- align its anti-terror legislation and its implementation, with European standards, the ECHR, ECtHR case law, the Venice Commission's recommendations, and the EU *acquis* and practices;
- improve the legislative framework and its implementation in order to effectively protect women's rights and gender equality, to effectively tackle all forms of racism and discrimination, including against LGBTIQ persons, and to ensure the protection of minorities;
- implement the ECtHR judgments as a matter of priority, including in the case of *Kavala vs Türkiye*.

### ***Freedom of expression***

Türkiye remains at an **early stage of preparation** in this area and there was **backsliding** during the reporting period. The implementation of criminal laws related to national security and counterterrorism continued to violate the ECHR and to diverge from the case law of the ECtHR, hindering freedom of expression. Judicial and administrative action against journalists, media and other voices that are critical of the government intensified. The media and broadcasting regulator continued to impose administrative and monetary fines in a discriminatory way, targeting almost exclusively independent and opposition media outlets. A new law on cybersecurity, like the 2022 Disinformation law, raises serious concerns due to vague rules and the lack of independent oversight that may result in further restrictions on fundamental rights and freedoms.

The Commission's recommendations from last year were not implemented and remain valid. In the coming year, Türkiye should in particular:

- release journalists, human rights defenders, lawyers, writers and academics being held in pre-trial detention, and ensure that the criminal cases against them are concluded in accordance with the criteria set by the ECHR and the ECtHR;

- revise its criminal legislation, in particular the anti-terror law, the Criminal Code, the data protection law, the internet law, the disinformation law, the cybersecurity law, as well as the legal framework related to the Radio and Television Supreme Council and the Internet Supervisory Authority, to ensure that they comply with European standards and are implemented in a proportionate and non-discriminatory manner that does not curtail freedom of expression;
- take steps to restore a safe and pluralist environment that enables the media to carry out their work independently and without fear of reprisals or dismissals.

#### Chapter 24: Justice, freedom and security

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Türkiye is **moderately prepared** in the area of justice, freedom and security. **Some progress** was made in this area, particularly in relation to further strengthening the capacity to survey and protect the land border with Iran. Türkiye continued to make significant efforts to host and support 2.7 million refugees including Syrians under temporary protection.

The Commission's recommendations from last year were only partially implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- fully implement the EU-Turkey Statement of March 2016, particularly by resuming returns from the Greek islands, and implement all provisions of the EU-Turkey Readmission Agreement in relation to all EU Member States;
- align legislation on personal data protection with the EU *acquis*, facilitating the conclusion of an international agreement on the exchange of personal data between Europol and Türkiye;
- adopt and implement a strategy and action plan on border management to improve coordination between border services at national and international levels.

#### ***Fight against serious and organised crime***

Türkiye has **some level of preparation** in implementing the EU *acquis* in this area. **Limited progress** was made overall in aligning with the EU *acquis* and practices. The completion of an international agreement on the exchange of personal data between Europol and the Turkish authorities responsible for fighting serious crime and terrorism is still pending, as Turkish data protection legislation is not yet in line with the EU *acquis*. Organised crime remains a threat. Progress in increasing the legal and institutional capacity to successfully prosecute and convict organized crime cases is inadequate. The Commission's recommendations from last year were only partially implemented, and therefore remain mostly valid. In the coming year, Türkiye should in particular:

- continue to improve its legal framework and practices on counterterrorism in line with the EU *acquis*, and strengthen its anti-money laundering, terrorist financing and financing of the proliferation of weapons of mass destruction system in line with the recommendations of the Venice Commission;
- conclude an international agreement with the EU on cooperation with Eurojust; further increase its operational willingness to cooperate and exchange information with EU law enforcement partners and engage in effective judicial cooperation with EU Member States;
- improve its legislation on witness protection and data protection.



## ECONOMIC CRITERIA

### The existence of a functioning market economy

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Türkiye is **well advanced** in creating a functioning market economy and made **some progress** over the reporting period. Faced with the economic fallout of domestic political turmoil, the authorities tightened their policy stance further. Economic growth moderated amid weakening domestic demand, while the external position strengthened. Tight monetary policy was instrumental in bringing down inflation and inflationary expectations, although both remained elevated. The banking sector remained stable. Fiscal consolidation advanced largely due to the winding-down of earthquake reconstruction spending. The labour market was strong in 2024, but still faces major structural challenges, such as large labour underutilisation, a high youth unemployment rate, and a low female participation rate. The authorities took limited steps to improve the business environment, which were mostly related to the functioning of the judiciary and specialised courts. State aid control remained weak, and transparency declined.

The policy guidance set out in the conclusions of the Economic and Financial Dialogue of May 2024 was partially implemented, but implementation improved markedly in comparison with previous years. To improve the functioning of the market economy, Türkiye should in particular:

- maintain a tight economic policy stance to support disinflation;
- reduce the budget deficit as planned;
- further improve the business environment by increasing institutionalised and inclusive stakeholder consultation, reducing state interference in price-setting mechanisms, preventing State aid that distorts competition, and ensuring State aid transparency.

### The capacity to cope with competitive pressure and market forces within the EU

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Türkiye has a **good level of preparation** and made **limited progress** in increasing its capacity to cope with competitive pressure and market forces within the EU.

The economy is diversified, with a well-developed service sector and strong manufacturing and agriculture sectors. Investment activity decelerated slightly in 2024. While efforts to boost human capital and the innovation system continued, skills mismatches and insufficient innovation persist. Economic integration with the EU remained high.

The Commission's recommendations from 2024 were only partially implemented. To improve competitiveness and support long-term growth, Türkiye should in particular:

- further tailor education and training to labour market needs, improve the quality of and access to vocational education and training, and support the school-to-work transition;
- continue efforts to diversify energy supplies and further increase the share of renewables in the energy mix, while ensuring stability and reliability of the grid;
- improve small to medium-sized enterprises' access to long-term finance.

### Chapter 5: Public procurement

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Türkiye is **moderately prepared** in the area of public procurement. **No progress** was made in this area over the reporting period and significant gaps with the EU *acquis* remain.

The Commission's recommendations from last year were not implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- revise its public procurement legislation to further align it with the EU *acquis*, including on utilities, concessions and public-private partnerships, and to increase transparency;
- reduce the excessive use of the negotiated procedure and improve instruments to evaluate contract performance and benchmark the effectiveness of public procurement procedures and contract management;
- repeal exemptions that are incompatible with the EU *acquis* and avoid the use of discriminatory domestic price advantages and offset practices.

## Chapter 18: Statistics

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Türkiye is **moderately prepared** on statistics. **Some progress** was made, notably by improving its national accounts, excessive deficit procedure, and government finance statistics. The Turkish Statistical Institute (TurkStat) stepped up its efforts to further align with the new requirements for short-term business statistics. The preparations for the agricultural census also advanced. However, Türkiye needs to increase the credibility of TurkStat and strengthen public trust in official statistics.

The Commission's recommendations from last year were only partially implemented, and therefore remain mostly valid. In the coming year, Türkiye should in particular:

- establish transparent, professional criteria for the appointment of the President of TurkStat and any grounds for dismissal, to strengthen the professional and scientific independence of TurkStat;
- continue work to align national accounts with the European System of Accounts (ESA 2010) and the requirements of the ESA 2010 transmission programme, including amplified efforts to remove the flags preventing the publication of data;
- further improve statistics on agriculture (including completion of the agricultural census) and on migration and asylum.

## Chapter 32: Financial control

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Türkiye has a **good level of preparation** on financial control. It made **no progress** throughout the reporting period. The Commission's recommendations from last year were not implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- organise a new round of public expenditure and financial accountability to assess the performance of the current public finance management, update the public internal financial control policy paper and the related action plan, and help prepare a comprehensive public financial management strategy;
- develop and adopt a national anti-fraud strategy;
- review the arrangements for including municipalities and state-owned enterprises in the treasury single account.

## CLUSTER 2: INTERNAL MARKET

### Chapter 1: Free movement of goods

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Türkiye has a **good level of preparation** on the free movement of goods. **Some progress** was made in aligning with the EU *acquis*, particularly under the 'old approach' and the 'new and global approach' to product legislation. Türkiye removed some technical barriers to trade in the reporting period. Yet, there are remaining unjustified checks for EU products and requirements discriminating against EU products, in breach of Türkiye's obligations under

the Customs Union.

The Commission's recommendations from last year were only partially implemented, and therefore remain mostly valid. In the coming year, Türkiye should in particular:

- continue to eliminate the remaining non-tariff barriers to the free movement of goods that are in breach of Customs Union obligations, with particular attention to the priority barriers discussed in the context of the July 2025 High-Level Dialogue on Trade;
- review the remaining schemes setting local content requirements;
- increase the coverage and effectiveness of market surveillance measures, particularly in e-commerce.

## Chapter 2: Freedom of movement for workers

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Türkiye remains at an **early stage of preparation** on the freedom of movement for workers. **No progress** was made during the reporting period.

The Commission's recommendation from last year was not implemented, and therefore remains valid. In the coming year, Türkiye should in particular:

- prepare legislation and administrative practices in view of joining the European Employment Services (EURES) network;
- align national legislation with EU *acquis* on access for EU citizens to the labour market.

## Chapter 3: Right of establishment and freedom to provide services

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Türkiye remains at an **early stage of preparation** on the right of establishment and freedom to provide services. **No progress** was made during the reporting period. Overall, substantial efforts are still required to achieve alignment in this area.

The Commission's recommendations from last year were not implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- align national legislation with the Services Directive and set up a point of single contact;
- continue to align its legislation in the area of postal services with the EU *acquis*;
- align national legislation with the EU *acquis* on mutual recognition of professional qualifications, including the Professional Qualifications Directive and the Proportionality Test Directive.

## Chapter 4: Free movement of capital

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Türkiye is **moderately prepared** in the area of free movement of capital. **Some progress** was made during the reporting period. Building on recent reforms intended to enable the country's removal from the Financial Action Task Force's (FATF) grey list, Türkiye continued to strengthen its legal framework and administrative capacity for combating money laundering and terrorist financing. While limited steps were taken on foreign ownership and capital movements, limitations persist in numerous sectors.

The Commission's recommendations from last year were only partially implemented, and therefore remain mostly valid. In the coming year, Türkiye should in particular:

- minimise limitations on foreign ownership and capital movements;

- further align with the FATF recommendations and the EU *acquis* by strengthening the legal framework and administrative capacity to more effectively prevent money laundering and the financing of terrorism.

#### Chapter 6: Company law

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Türkiye is **well advanced** on company law. **Limited progress** was made during the reporting period by adopting accounting principles for the measurement and classification of crypto assets.

The Commission's recommendations from last year were only partially implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- further align its national legislation with the EU *acquis* on shareholder rights on encouragement of long-term shareholder engagement and cross-border conversions, mergers and divisions;
- put arrangements in place for company reporting, including corporate sustainability reporting and disclosure of income tax information (country-by-country reporting);
- take steps to align its legislation with the EU *acquis* to improve gender balance among directors of listed companies and take related measures.

#### Chapter 7: Intellectual property law

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Türkiye has a **good level of preparation** on intellectual property law. **Limited progress** was made during the reporting period. There are still some legislative discrepancies as well as outstanding problems with implementation and enforcement, notably in relation to judicial procedures.

The Commission's recommendations from last year were only partially implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- improve enforcement measures to efficiently fight intellectual property right (IPR) infringements, including online sales of counterfeit and pirated goods, improve the level of IPR specialisation of judges, and resolve difficulties in the judicial procedures to obtain search and seizure warrants for criminal law enforcement;
- further improve cooperation with IPR holders for efficient implementation and effective enforcement, particularly in cases involving accelerated and simplified destruction procedures applied by the judiciary and customs authorities;
- ensure the collection and processing of accurate statistical data, especially on the effective judicial enforcement of intellectual and industrial property rights, to better analyse systemic IPR shortcomings.

#### Chapter 8: Competition policy

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Türkiye has **some level of preparation** on competition policy. **No progress** was made during the reporting period. Concerns remain in the area of State aid.

The Commission's recommendations from last year were not implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- ensure the independence and functionality of the State aid institutional framework in accordance with the EU *acquis*;
- implement the State aid law by adopting implementing legislation without further delay;

→ make available a transparent and up-to-date inventory of all aid schemes.

## Chapter 9: Financial services

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Türkiye has a **good level of preparation** on financial services. **Limited progress** was made during the reporting period, in particular by further unwinding the disruptive macroprudential and regulatory measures in the financial sector. Türkiye took some steps to promote investments in venture capital companies and strengthen the legal framework for crypto assets.

The Commission's recommendations from last year were only partially implemented, and therefore remain largely valid. In the coming year, Türkiye should in particular:

- increase efforts to align its legislation with the revised Capital Requirements Regulation, Capital Requirements Directive and Bank Recovery and Resolution Directive;
- further phase out the distortive macroprudential measures and simplify the regulatory framework;
- further align its legislation with the EU *acquis* related to capital markets and financial market infrastructures, and ensure their proper supervision.

## Chapter 28: Consumer and health protection

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Türkiye has a **good level of preparation** on consumer and health protection. **Limited progress** was made during the reporting period, notably by strengthening its surveillance system for health services and tackling serious cross-border health threats, as well as on the de-institutionalisation of mental health services.

The Commission's recommendations from last year were only partially implemented, and therefore remain mostly valid. In the coming year, Türkiye should in particular:

- strengthen consumer rights enforcement, and further improve coordination and cooperation with the consumer movement and with enforcement bodies; increase awareness-raising activities, take more measures on infringements in the digital environment, and introduce more measures to support vulnerable consumers;
- strengthen its primary healthcare services by providing sufficient resources for public health emergencies risk assessment and risk management at central and provincial levels, and by boosting its workforce and administrative capacity for preparedness and response to disasters;
- start preparing to align its legislation with the new EU Regulation on substances of human origin.

## CLUSTER 3: COMPETITIVENESS AND INCLUSIVE GROWTH

### Chapter 10: Digital transformation and media

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Türkiye has **some level of preparation** on digital transformation and media. **Some progress** was made during the reporting period. Türkiye recorded progress on e-commerce and e-governance, and adopted the 2030 Technology and Industry Strategy and a cybersecurity strategy and action plan.

The Commission's recommendations from last year were only partially implemented, particularly as regards cybersecurity and 5G, and therefore remain valid. In the coming year, Türkiye should in particular:

- align its universal service, authorisation arrangements, and rules on market access and rights of way in electronic communications with the EU *acquis*;
- align its cybersecurity framework with EU cybersecurity standards, including with the NIS 2 Directive and the 5G Cybersecurity Toolbox;
- strengthen the independence of the regulatory authority and its board members, and amend the internet law in line with the Venice Commission's recommendations to ensure media pluralism; and take steps to strengthen the public broadcaster's independence.

## Chapter 16: Taxation

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Türkiye is **moderately prepared** on taxation. **No progress** was made over the reporting period.

The Commission's recommendations from last year were not implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- enable the automatic exchange of tax information with all EU Member States according to international standards;
- continue to align its legislation on value added tax and excise duties, notably the range of excisable energy products, with the EU *acquis*;
- continue to fight against the informal economy, and report on progress transparently using key performance indicators.

## Chapter 17: Economic and monetary policy

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Türkiye has **some level of preparation** on economic and monetary policy. **Good progress** was made during the reporting period, notably by taking measures to support the monetary policy transmission mechanism and presenting a more realistic macroeconomic framework. Türkiye also made improvements in data quality and timeliness of reporting under the excessive deficit procedure.

The Commission's recommendations from last year were partially implemented, and therefore remain mostly valid. In the coming year, Türkiye should in particular:

- safeguard the independence of the central bank;
- further simplify the monetary policy framework under a transparent monetary policy, while maintaining financial stability.

## Chapter 19: Social policy and employment

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Türkiye has **some level of preparation** on social policy and employment. **No progress** was made over the reporting period. Concerns remain regarding discrimination in employment, trade union rights, persistent levels of informal employment, with the Roma community particularly affected, the labour market gender gap, and income inequalities.

The Commission's recommendations from last year remain mostly valid. In the coming year, Türkiye should in particular:

- take steps to align with the EU *acquis* on non-discrimination based on racial and ethnic origin, religion and belief, disability, age and sexual orientation, equal opportunities in the workplace, work-life balance, and pay transparency.
- remove obstacles that limit the unionisation and collective bargaining rights by using social dialogue mechanisms effectively;

- tackle challenges to health and safety at work, particularly in relation to fatal incidents in the construction sector and among platform workers and young apprentices;
- increase the formal employment rate of women and young people by expanding affordable care services and adopting more substantial and more effective active labour market programmes.

### Chapter 20: Enterprise and industrial policy

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Türkiye is **moderately prepared** on enterprise and industrial policy. **Limited progress** was made during the reporting period by adopting a new strategy document and conducting impact assessments of a few support schemes. Concerns persist regarding the compatibility of public procurement practices with EU industrial policy principles, the lack of transparency in State-aid for large investments, and the sizeable informal economy.

The Commission's recommendations from last year were only partially implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- remove public procurement price premiums that are incompatible with EU industrial policy principles, and substitute them with measures that encourage innovation;
- publish the amounts distributed under the industry support programme as well as the results of the industrial strategies from previous periods;
- continue assessing the impact of the SME support framework to reduce gaps and overlaps.

### Chapter 25: Science and research

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Türkiye is **well advanced** on science and research. **Good progress** was made during the reporting period, notably linked to participation in Horizon Europe and continued actions to raise awareness of and increase capacity for the programme. There is active and expanding cooperation between the EU and Türkiye on research and innovation underlined by the improved ranking of Türkiye in the European Innovation Scoreboard.

The Commission's recommendation from last year was only partially implemented, and therefore remains valid. In the coming year, Türkiye should in particular:

- step up efforts to boost innovation to ensure continuous improvements to the European Innovation Scoreboard rankings.

### Chapter 26: Education and culture

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Türkiye is **moderately prepared** on education and culture. **Some progress** was made during the reporting period, notably regarding the vocational education and national qualifications systems.

The Commission's recommendations from last year were only partially implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- further improve inclusive education, with a particular focus on girls and children from disadvantaged groups including Roma, and closely monitor and continue work to reduce the proportion of school dropouts;
- ensure the good functioning of the Turkish Qualifications Framework and the Turkish Higher Education Quality Council;
- continue taking steps to implement the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions.

## Chapter 29: Customs Union

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Türkiye maintains a **good level of preparation** on the Customs Union. **No progress** was made during the reporting period. Duty relief, free zones and the surveillance scheme are still not fully aligned with the EU *acquis*, and are in breach of the Customs Union rules.

The Commission's recommendations from last year remain mostly valid. In the coming year, Türkiye should in particular:

- step up efforts to fully align new legislation with the EU Customs Code and bring risk-based controls and simplified procedures in line with the EU *acquis*;
- strengthen controls and cooperation with the European Anti-Fraud Office (OLAF) in administrative investigations, e.g. in cases of transshipment or simple transformation of goods in the country that could lead to false declaration of origin of goods at import into the EU;
- continue to eliminate import and export restrictions as well as additional duties on goods in free circulation in the EU-Turkey Customs Union.

## CLUSTER 4: THE GREEN AGENDA AND SUSTAINABLE CONNECTIVITY

### Chapter 14: Transport policy

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Türkiye remains **moderately prepared** on transport policy. **Limited progress** was made during the reporting period, particularly regarding sustainable transport strategies and sectoral legislative adjustments. Türkiye's general compliance with the EU transport *acquis* still presents gaps, notably in road safety, rail liberalisation, maritime safety, and multimodal transport facilitation. The provision of subsidies to the incumbent railway operator continued at an increasing pace.

The Commission's recommendations from last year were only partially implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- consider measures for effective monitoring, along with potential feasibility schemes to support the uptake of new and green technologies for alternative fuels in Türkiye;
- consider establishing tools and capacity building at private and public level for transport decarbonisation, starting with aviation and maritime transport, and set interim targets;
- finalise and publish its first white paper on sustainable urban mobility planning, including disaster aspects, as part of the ongoing work on the sustainable urban mobility plans, while improving policy dialogue and increasing coordination between local and central authorities.

### Chapter 15: Energy

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Türkiye is **moderately prepared** on energy. **Limited progress** was made during the reporting period, with the roll-out of renewable energy and energy efficiency as well as further diversification of energy sources. Local content requirement practices in the renewable energy sector remain in place. Türkiye's legislative changes related to the natural gas market do not yet ensure compatibility with the EU's third energy package. Energy dependency on Russia continued. Türkiye continued to make efforts on the legislative alignment of nuclear safety regulations.

The Commission's recommendations from last year were only partially implemented, and therefore remain mostly valid. In the coming year, Türkiye should in particular:



- deepen natural gas market reform by setting up a legally binding plan and a timetable for unbundling activities to ensure consistency with the natural gas market law and the EU's third energy package of 2009 and its update, the EU's hydrogen and gas decarbonisation package of 2024;
- transition to non-price measures to tackle energy poverty and provide economic relief to eligible households, in order to restore market-based retail pricing and remove disincentives to energy efficiency gains;
- complete the legislative alignment with Euratom *acquis*, and address the recommendations from the stress tests on the Akkuyu nuclear power plant.

### Chapter 21: Trans-European networks

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Türkiye is **well advanced** on trans-European networks. **Limited progress** was made during the reporting period. On transport networks, Türkiye continued to advance projects that contribute to the extension of the comprehensive trans-European transport networks to its territory, and the construction of the Halkalı-Kapıkule railway advanced.

The Commission's recommendations from last year were only partially implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- create a transparent, cost-reflective and non-discriminatory gas transit framework in line with the EU *acquis*;
- take concrete steps to mobilise investments for Yavuz Sultan Selim Bridge railway connections while increasing the rail capacity of the Marmaray tunnel and optimising freight operations;
- accelerate action to align with key pieces of the EU *acquis* to facilitate alignment in the trans-European networks.

### Chapter 27: Environment and climate change

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Türkiye has **some level of preparation** on environment and made **some progress** over the reporting period. Türkiye took some steps on industrial emissions and waste management. On climate change, Türkiye adopted the 2053 Long-Term Climate Strategy and a climate law setting up an emissions trading system.

The Commission's recommendations from last year were only partially implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- ensure that environmental standards are met when building back better in the earthquake-affected areas, in particular by fully implementing the Environmental Impact Assessment Directive and other horizontal environmental legislation, and ensure that protection from exposure to asbestos in the earthquakes affected areas is duly implemented;
- complete alignment with the Directives on industrial emissions, water and waste as well as on nature protection and air quality;
- complete its alignment with the EU *acquis* on climate action, notably but not limited to emission trading, and submit a more ambitious Nationally Determined Contribution to the UNFCCC.

## Chapter 11: Agriculture and rural development

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Türkiye has **some level of preparation** on agriculture and rural development. **Limited progress** was made in the reporting period. Türkiye's agricultural support policy continued to move away from the principles of the EU common agricultural policy. Notable improvements were made on the implementation of the EU Instrument for Pre-accession Assistance for Rural Development (IPARD), with an increased national financial contribution and a significant absorption of funds.

The Commission's recommendations from last year were only partially implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- align legislation to the EU *acquis*, notably on the agricultural support policy;
- set up a farm sustainability data network and an integrated administration and control system;
- pursue the opening and transparent management of import quotas for beef and live bovine animals on a lasting basis.

## Chapter 12: Food safety, veterinary and phytosanitary policy

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Türkiye has **some level of preparation** on food safety, veterinary and phytosanitary policy. **No progress** was made over the reporting period. Full implementation of the EU *acquis* in this area requires significant further work.

The Commission's recommendations from last year were not implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- upgrade producing food, feed and animal by-products to meet EU structural standards, notably for raw milk;
- meet EU maximum limits for pesticide residues, and effectively address recurrent shortcomings;
- integrate the EU's One Health approach into the zoonosis control system.

## Chapter 13: Fisheries and aquaculture

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Türkiye is **moderately prepared** on fisheries and aquaculture. **Some progress** was made, notably on resources and fleet management, and on inspection and controls.

The Commission's recommendations from last year were only partially implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- further improve data collection and sharing to support scientific advice for sustainable fisheries management in line with EU law;
- step up efforts to align its market policy with EU rules, in particular on the criteria governing the recognition and roles of professional organisations;
- accelerate alignment of monitoring, control, enforcement, surveillance and inspection of fisheries in the Mediterranean Sea with European standards, and strengthen efforts to combat illegal, unreported and unregulated (IUU) fishing.

## Chapter 22: Regional policy and the coordination of structural instruments

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Türkiye is **moderately prepared** on regional policy and coordination of structural instruments. **No progress** was made during the reporting period.

The Commission's recommendations from last year remain mostly valid. In the coming year, Türkiye should in particular:

- ensure the proper functioning of local democracy and more balanced regional development;
- improve the monitoring of ongoing operations under the Instrument for Pre-accession Assistance (IPA II), and accelerate implementation under IPA III with high-quality results and avoiding decommitments;
- address over-centralisation and structural weaknesses in regional policy implementation.

### **Chapter 33: Financial and budgetary provisions**

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Türkiye has **some level of preparation** on financial and budgetary provisions. **No progress** was made over the reporting period.

The Commission's recommendation from last year was not met, and therefore remains valid. In the coming year, Türkiye should in particular:

- further align the gross national income inventory with Eurostat's GNI Inventory Guide.

## **CLUSTER 6: EXTERNAL RELATIONS**

### **Chapter 30: External relations**

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Türkiye is **moderately prepared** on external relations. **Limited progress** was made in the reporting period.

The Commission's recommendations from last year were not implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- fully realign the customs tariff with the Common Customs Tariff;
- complete alignment with the EU's Generalised Scheme of Preferences and dual-use export control regime;
- align its (future revised) national legislation on the screening of foreign investments with the EU foreign direct investments (FDI) Screening Regulation 2019/452.

### **Chapter 31: Foreign, security and defence policy**

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Türkiye has **some level of preparation** on common foreign, security and defence policy, and made **limited progress**. While showing little political will to harmonise its foreign policy with the EU's, Türkiye appeared more open to substantive exchanges with the EU on foreign policy and regional issues. In this regard, a number of EU-Türkiye foreign and regional policy dialogues and consultations took place during the reporting period. Türkiye did not demonstrate willingness to improve its alignment with the EU's common foreign and security policy (CFSP). Absence of any effort to improve alignment contravenes Türkiye's proclaimed strategic goal of joining the EU.

Türkiye continued to implement an active and multi-layered foreign policy. Increasing geopolitical challenges underscored Türkiye's strategic regional role and highlighted the shared interest and responsibility of the EU and Türkiye to address common challenges.

As regards Russia's war of aggression against Ukraine, Türkiye continued to highlight its facilitation and potential mediation role, as underpinned by hosting direct talks between

Russia and Ukraine in Istanbul in May, June and July 2025. Türkiye consistently does not align with the EU's restrictive measures against Russia; however, it has made steps to prevent the circumvention of sanctions against Russia via Turkish territory, delivering some results.

On the Middle East peace process, Türkiye aligns with the EU's position on the need to relaunch the political process in order to implement the two-state solution, and participates in the 'Global Coalition' for its implementation. The Turkish position on certain issues – such as Hamas, which is considered a legitimate political interlocutor by Ankara – cannot be reconciled with the EU's position, which clearly labels Hamas as a terrorist organisation. Türkiye constructively contributed to mediation efforts in the Gaza ceasefire and participated in the Gaza peace summit in Sharm El-Sheikh, co-signing the declaration on 13 October 2025. On Syria, following the fall of the Assad regime in December 2024, Türkiye increased its leverage over developments in the country significantly. Türkiye engaged heavily with stakeholders to support the transition, strongly advocating the lifting of EU and US sanctions. Türkiye maintained a strategic partnership with China, seeking opportunities to strengthen economic and investment links, increase bilateral trade and reduce trade imbalances, while also engaging in consultations on major regional and global issues.

Under the common security and defence policy, Türkiye continued to actively participate in and substantially contribute to EU crisis management missions and operations.

The Commission's recommendations from last year were only partially implemented, and therefore remain valid. In the coming year, Türkiye should in particular:

- urgently and significantly improve alignment with the High Representative's statements on behalf of the EU and relevant Council decisions on sanctions;
- continue its efforts to detect and prevent circumvention of restrictive measures, in particular on advanced technology items used for military purposes by Russia; extend its measures to prevent re-export the economically critical goods; and address risks linked with Russia's 'Shadow Fleet' in terms of maritime and environmental safety;
- continue to engage in a more structured and frequent political dialogue on foreign and security policy with the EU and seek collaboration on convergent interests while working on reducing divergences.

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## **2. CLUSTER 1: THE FUNDAMENTALS OF THE ACCESSION PROCESS**

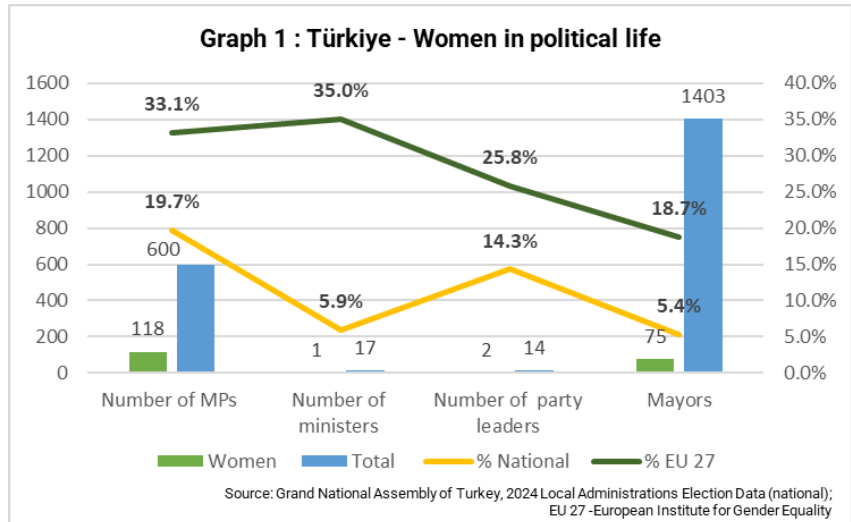
### **2.1. FUNCTIONING OF DEMOCRATIC INSTITUTIONS AND PUBLIC ADMINISTRATION REFORM**

#### **2.1.1. Democracy**

The functioning of Türkiye's democratic institutions continued to be severely hampered. Democratic backsliding resumed on critical issues, particularly the rule of law and local governance. The structural flaws of the presidential system, and the insufficient separation of powers between the executive and the judiciary remained unaddressed, while adherence to basic democratic processes was put into question.

#### **Elections**

The general framework of the elections largely ensures free choice between alternative political options but does not provide a level playing field for all political stakeholders. Excessive judicial pressure on opposition politicians limited their freedom to operate, organise, and participate in the political process without fear of repression, thereby undermining fundamental democratic principles. In March 2025, the mayor of Istanbul and the presumptive presidential candidate of the opposition was arrested along with many others, including Republican People's Party (CHP) district mayors and senior municipal officials on charges of alleged corruption. A university invalidated the mayor's diploma, which was issued 30 years ago. This decision would prevent him from running for president, as the position requires candidates to hold a university degree. He is appealing the decision. No elections were held in the reporting period.



The shortcomings identified in the **legal framework governing elections and political parties** were not addressed. Türkiye has not yet acted upon the recommendations put forward by the Office for Democratic Institutions and Human Rights of the Organization for Security and Co-operation in Europe and the Venice Commission.

## Parliament

The **President** continues to retain far-reaching powers over a wide range of policy issues, limiting Parliament's functions. The frequent and continued use of presidential decrees and decisions restricted Parliament's legislative function. Opposition parties had limited power to shape the agenda of legislative debates.

**Parliamentary oversight** of the executive remains very weak. Members of Parliament (MPs) may submit written questions to the Vice-President and Ministers, but not to the President. Moreover, standard presidential decrees fall outside the remit of parliamentary scrutiny, despite their significant impact on public policy. The Venice Commission emphasised the urgent need to strengthen the legislature's oversight of public spending.

**Political pluralism** continued to erode due to judicial and administrative actions targeting opposition parties and their representatives. The Republican People's Party (CHP) faced a steep increase in criminal investigations and lawsuits against its mayors and members, contributing to a climate of intimidation against the political opposition. Despite a binding ruling by the European Court of Human Rights (ECtHR) calling for their immediate release, several former lawmakers from the pro-Kurdish Peoples' Democratic Party (HDP), including two former co-chairs, remain incarcerated. Moreover, the Constitutional Court ruling calling for the release of one of the detained defendants in the Gezi trial, who had been elected as an MP, is yet to be implemented. Meanwhile, the closure case against the HDP, based on terrorism-related accusations and seeking a political ban on 451 party members, continues before the Constitutional Court. The pro-Kurdish Peoples' Equality and Democracy Party

(DEM) HDP's political successor, continued facing increasing pressure with several thousand party members being detained and several hundred were arrested pending trial.

Restrictions on public gatherings were used selectively to prevent political action by opposition parties.

Although female representation in Parliament has reached a historic peak, **women remain significantly under-represented in decision-making and political life.**

### **Governance**

Under the current presidential system, Parliament lacks access to mechanisms for holding the executive accountable, such as motions of confidence or oral question time. The President has far-reaching powers of appointment, execution and policymaking, while presidential political accountability is limited primarily to the electoral process. The executive's influence over the public administration, the judiciary, and security institutions remains extensive. The President retains the authority to appoint the leadership and board members of most key institutions and regulatory agencies. The public sector remains marked by politicisation. The recommendations outlined in the Venice Commission's 2017 opinion on Türkiye's presidential system are yet to be addressed.

On **local self-governance**, the government's pressure on opposition mayors escalated, including through administrative, financial and judicial means. The use of pressure tools, such as the appointment of trustees or the selective seizure of financial assets of opposition municipalities, culminated in the arrest of the mayor of Istanbul in March 2025. Between 1 September 2024 and 1 September 2025, judicial investigations were launched across Türkiye against several opposition-controlled municipalities, with suspensions of mayors as well as detentions and arrests of political and administrative personnel. Allegations included membership of terrorist organisations, corruption, and illicit financial activities. A total of 28 mayors from opposition parties – 18 from the CHP and 10 from the DEM – were arrested and removed from office, with some of them accused of supporting a terrorist organisation due to an informal political agreement between the CHP and the DEM before the March 2024 local elections. In 11 cases, mayors were replaced with trustees, while in four municipalities, the assemblies could elect a new acting mayor. In March 2025, the Congress of Local and Regional Authorities of the Council of Europe criticised the practice of replacing democratically elected mayors with government-appointed trustees. It also noted signs of deterioration of the working conditions of local and regional elected representatives, while it considered the dismissals, arrests and prosecutions of opposition mayors on grounds of terrorism and corruption as contributing to the weakening of fundamental freedoms and the rule of law in Türkiye. The Congress took the view that the arrest of the mayor of Istanbul bore the hallmarks of political pressure.

### **EU integration**

Türkiye has put in place institutional structures to manage the accession process effectively. The Directorate for EU Affairs and its network of focal points within line ministries is adequately staffed. The Directorate cooperates effectively with the EU Delegation and has a communication department responsible for communication on EU enlargement and reforms supported by the Instrument for Pre-accession Assistance.

### **Civil society**

Civil society organisations – especially those dealing with women's rights, LGBTIQ issues, environmental protection and human rights – continued to face growing pressure, including by means of systematic administrative harassment and judicial prosecutions. Human rights defender Osman Kavala and his four co-defendants in the Gezi trial remained in prison,

despite a ruling by the ECtHR and numerous resolutions adopted by the Council of Europe Committee of Ministers urging his immediate release. New judicial proceedings were launched against journalists and other individuals for their alleged participation in Gezi protests, 12 years after the events. The Istanbul Bar Association's chairperson and executives faced dismissal and prison sentences on charges of 'making propaganda for a terrorist organisation' and 'spreading false information'.

Only a very limited number of CSOs benefit from public funds, which are distributed in a discriminatory manner. Heavy taxation hampers the functioning and development of foundations and associations. CSOs receiving funding from foreign donors were subjected to frequent audits. Moreover, CSOs and independent media outlets supported financially by foreign sources were often targeted with hateful rhetoric and slander by pro-government media.

Public consultations of independent CSOs on new legislation and policies remained very limited and ineffective. Overall, the political, legal, financial and administrative hurdles that prevent civil society in Türkiye from operating effectively remained unchanged.

### **Civilian oversight of the security forces**

The President and the government exercise substantial control over the country's security forces. Genuine democratic oversight remains weak due to limited public accountability and inadequate parliamentary oversight. Security institutions have reportedly become increasingly politicised, undermining their professionalism and independence. Strengthening inter-party parliamentary oversight of security and intelligence bodies is a key reform priority. Parliamentary oversight and follow-up regarding the defence budget, expenditures, and arms procurement remain limited and ineffective. Impunity among security forces remains widespread, with personnel often enjoying informal legal and administrative protection in cases of alleged human rights violations, excessive use of force, and other misconduct. Overall, civilian democratic oversight of the security forces remains weak and needs to be strengthened.

### **Situation in the east and south-east regions**

An initiative to address the Kurdish issue and end the violence linked to the Kurdistan Workers' Party (PKK), designated as a terrorist organisation by the EU, was launched by a ruling coalition partner and gained with broad political support. The process is led confidentially by the government. The Parliamentary 'National Solidarity, Brotherhood and Democracy Committee', including members from major political parties, was established in August to oversee PKK disarmament process and to conduct preparatory consultations on reforms required to address the Kurdish issue. After years of prolonged isolation – repeatedly criticised by the Council of Europe's Committee for the Prevention of Torture – the imprisoned PKK leader was permitted visits from family members and delegations from the DEM party, as part of this government-led initiative.

In February 2025, the PKK's leader publicly called for the organisation to disarm and dissolve, leading to a unilateral ceasefire in March 2025. In May 2025, at a congress in northern Iraq, the PKK officially ended its armed struggle and formally dissolved its organisational structure. DEM party representatives met the Turkish President to support democratic solutions. In July 2025, a group of 30 PKK militants symbolically burned their weapons in northern Iraq, marking the start of the PKK's transition from armed struggle to political engagement. On 26 October, PKK announced it was withdrawing its fighters from Türkiye to northern Iraq as part of the peace efforts and called on Türkiye to help it transit to democratic politics with concrete measures.

However, Türkiye continued its domestic and cross-border military operations in northern Syria and Iraq against the PKK. On 20 October, the Turkish Parliament passed a three-years mandate extension of the Turkish troops deployed in Syria and Iraq. The security situation in border areas remained precarious, marked by sporadic PKK-led attacks. In October 2024, the PKK carried out a deadly terrorist attack targeting employees of the Turkish Aerospace Industries (TUSAŞ) in Ankara.

The government has the right and responsibility to combat terrorism. However, it should respect the rule of law, human rights and fundamental freedoms. Violations of human rights by security forces continued to be reported. Hate offences against Kurds continued. The administrative remedies and judicial cases in relation to property rights cases in Diyarbakır's Sur district and the region continued in court. The practice of applying a broad interpretation of terrorism, and the judicial and administrative pressure on journalists, political opponents, bar associations and human rights defenders working on the Kurdish issue, continued.

Eleven mayors in the east and south-east were dismissed and replaced by state-appointed trustees. These appointments triggered widespread protests and led to numerous detentions, with law enforcement reportedly using disproportionate force. In response, governorates imposed blanket bans on all public gatherings for several days to suppress further demonstrations. The March 2022 recommendations issued by the Congress of Local and Regional Authorities of the Council of Europe regarding local democracy in Türkiye are yet to be implemented.

In March 2025, Newroz celebrations took place peacefully, despite heavy police presence and measures against public gatherings. Still, around 200 people were detained in Diyarbakır on Newroz day, and were released the next day. Most Kurdish-language media outlets and cultural rights institutions have remained closed since 2016.

Former HDP co-chair Selahattin Demirtaş remained in prison despite the ECtHR rulings and repeated calls for his immediate release by human rights organisation and the EU. Many DEM party members, representatives and mayors, including from large municipalities, were detained on terrorism-related charges. The case of the killing of Diyarbakır Bar Association Chair Tahir Elçi reached the Constitutional Court.

Court cases continued over government-funded construction projects on cultural, historical and religious heritage sites damaged during the 2015 and 2016 military and security operations. There was no comprehensive approach to addressing the issue of missing persons, or to independently investigating alleged extrajudicial killings by security forces. So far, all cases of enforced disappearances from the 1990s before local courts ended in acquittals or were dropped due to the statute of limitations. The village guard system continued to hinder the return of displaced villagers and constituted an impediment to a political resolution of the Kurdish issue.

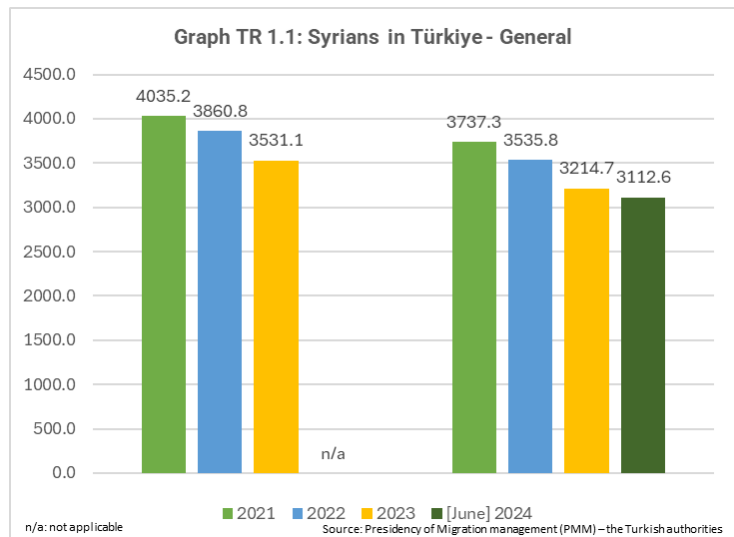
### **Refugees and internally displaced persons**

Türkiye continues to host one of the largest refugee populations in the world. As of August 2025, according to official data, Türkiye was hosting 2 508 446 Syrians with temporary protection status, and 52 437 Syrians with short-term residence status. Türkiye does not regularly publish the total number of refugees in the country.

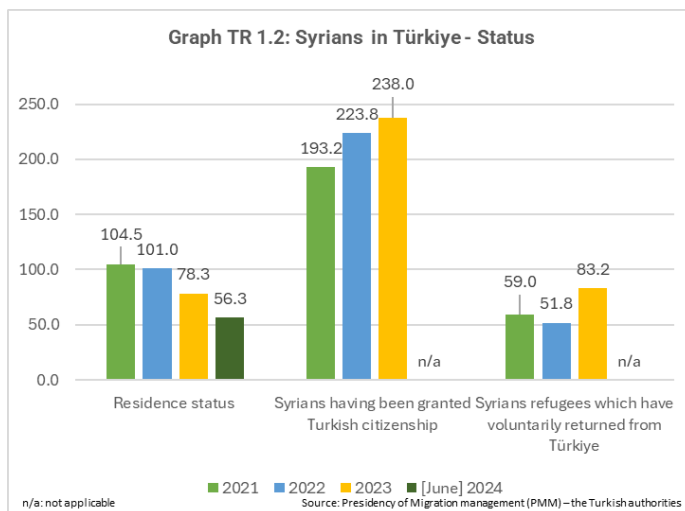
According to the government, the pace of voluntary returns of Syrians accelerated after the fall of the Assad regime in December 2024.



In August 2025, the Turkish authorities announced that more than 450 000 Syrians had returned to their country from Türkiye since the fall of the Assad regime. The total number of voluntary returns since 2016 has reached 1.2 million. Additionally, the Minister of Interior Ali Yerlikaya announced that, in May 2025, Türkiye hosted 172 602 people under international protection, mostly Afghans, Iraqis, and Iranians. On the other hand, as of August 2025 there were 1 106 660 foreign nationals holding residence permits, including humanitarian residence permit holders.



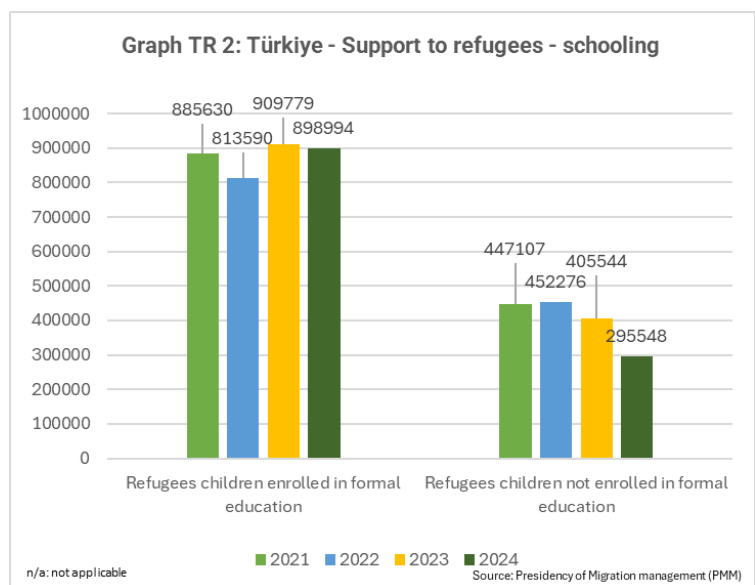
Türkiye continued to make significant efforts to support refugees and ensure wider access to healthcare and schooling, although restrictions on registration hampered access.



Refugees (mainly Syrians under temporary protection) continued to benefit from free-of-charge healthcare services provided in 176 migrant health centres, nine container health units, and Turkish hospitals. The capacity of mental health and psychosocial support services, reproductive health services, mobile health services and health literacy services for refugees improved. Construction and renovation of migrant health centres continued. Effective access of applicants for international protection to the labour

market, in particular to formal employment, remained difficult. However, in October 2024, Türkiye allowed foreigners under temporary protection or holding humanitarian residence permits to be exempted from the requirement to obtain work permits.

On refugee education, the EU-funded PIKTES project continued to support the integration of Syrians into formal education. The number of refugee children enrolled in formal education in October 2024 was 938 610. A significant number of refugee children – 310 301 – were not enrolled in



formal education in the academic year 2024-2025. This, however, is a reduction from 405 544 in 2023. An average of approximately 1.5 million refugees received monthly cash assistance throughout the year 2024.

The return of irregular migrants from the Greek islands did not resume. The EU has repeatedly called on Türkiye to resume return operations in line with the commitments made under the 2016 EU-Turkey Statement. Resettlement of Syrian refugees from Türkiye to EU Member States continued in the reporting period, totalling 43 945 by July 2025.

There was no progress on the situation of **internally displaced persons** due to violence in the south-east region during the 1990s and in more recent years. People displaced after the February 2023 earthquakes continued to encounter significant challenges.

## 2.1.2. Public administration reform

### Strategic framework for public administration reform

Türkiye lacks a comprehensive **strategy for public administration** and financial management reform. As a consequence of the heavy centralisation of decision-making in the Presidency, coordination among key administrative stakeholders remained weak. Political commitment to public administration reform is lacking. There is no effective performance measurement and monitoring system based on performance indicators linked to specific targets.

### Policy development and coordination

Policy development and coordination mechanisms need improvement. **Policymaking** has become very centralised under the presidential system, limiting inclusive, participatory and evidence-based approaches. The Presidency lacks detailed procedural rules for drafting and deciding on policies.

Under Türkiye's presidential system, only members of Parliament can introduce legislative proposals. In the reporting period, only bills sponsored by the ruling coalition were passed, due to an increasingly polarised political climate. This dynamic significantly limits broader participation in the legislative process. In addition, Parliament needs to strengthen its capacity for drafting legislation to ensure that all laws adopted – regardless of their origin – are evidence-based and effectively serve their intended policy objective.

Administrative and political **accountability** is low. The connection between policy planning and budget allocation remains weak. State institutions do not conduct regular evaluations or publicly report on the implementation of major government programmes. As a result, public oversight of government activities is very limited.

### Public financial management

While the basic legal framework for **public financial management** exists, it needs strengthening, particularly in terms of implementation. The Medium-Term Economic Programme is the government's main planning tool for managing public finances. The annual budget is then prepared within this medium-term financial framework. Several sectoral policy and planning documents were adopted, but they fall short of offering a strategic reform agenda.

The efficiency of public finances needs to be improved. Conducting comprehensive and transparent expenditure reviews as part of the budget process would help improve the effectiveness of spending. A gender-responsive planning and budgeting approach is still lacking. During the reporting period, the Presidency and the Ministry of Treasury and Finance published monthly budget execution data. Budget figures remain highly aggregated, making

detailed analysis difficult. Public involvement in the budget process is low. Parliamentary oversight of the budget needs to be improved.

Parliament has limited capacity to thoroughly analyse each audit report. Limited parliamentary control over the budget further undermines transparency and effective oversight. The Turkish State Wealth Fund remains largely unaccountable.

#### Public service and human resources management

The centralised system for civil service **human resources management** remains inadequate. The legal framework for civil servants does not ensure neutrality, continuity, or merit-based recruitment and promotion. This undermines the efficiency of **public services**. The selection process for senior civil service roles lacks clear and objective criteria, making appointments prone to favouritism and political influence. Politicisation of the civil service, also at managerial level, is concerning. As of July 2025, there were 5 288 449 public employees, making up 16% of total employment. Only about 35% of public-sector employees are women.

#### Accountability of administration

**Administrative accountability** remains weak, with most key government functions delegated to appointed ministries under the Presidency. The legal and administrative accountability of ministers is limited, as their ultimate political accountability rests with the President. However, the President's accountability mechanisms are equally weak. In particular, parliamentary oversight requires significant improvement.

Supervisory institutions like the Ombudsman lack functional and administrative independence, and thus play a limited role. Internal control and audit bodies lack independence, capacity and autonomy. The public's right to good administration requires more robust oversight structures. Accountability of civil servants remains problematic, as demonstrated by the few investigations related to the 2023 earthquakes. Prosecution of civil servants for negligence or misconduct must be authorised by the relevant ministries. This requirement delays cases, and very few cases are authorised. Broad exemptions to access-to-information rules hinder transparency. There is no central mechanism for proactively disclosing public information.

Recent tragic events, such as the devastating 2023 earthquakes and the 2025 hotel fire at a ski resort, have once again brought attention to the issue of accountability of civil servants who are responsible for oversight and authorisation. Legal proceedings against government and municipal officials remain slow or completely absent. One major hurdle to holding public officials accountable is the requirement to obtain a special permission by the Ministry of Interior to prosecute, which is almost always refused.

#### Service delivery to persons and businesses

Service delivery to persons and businesses needs to be improved. While public services are generally accessible, significant gaps remain in both their quality and availability. Türkiye lacks a general administrative procedure law, which makes it difficult to ensure adherence to good administrative practices. There is no central policy or coordination mechanism to improve service quality across the board. Nonetheless, progress was made in expanding e-services through the e-Government Gateway.

## 2.2. RULE OF LAW AND FUNDAMENTAL RIGHTS

### 2.2.1 Chapter 23: Judiciary and fundamental rights

The EU's founding values include the rule of law and respect for human rights. A robust (independent, high-quality and efficient) judiciary and a strong commitment to fighting corruption are essential, as is respect for fundamental rights, both in legislation and practice.

#### Functioning of the judiciary

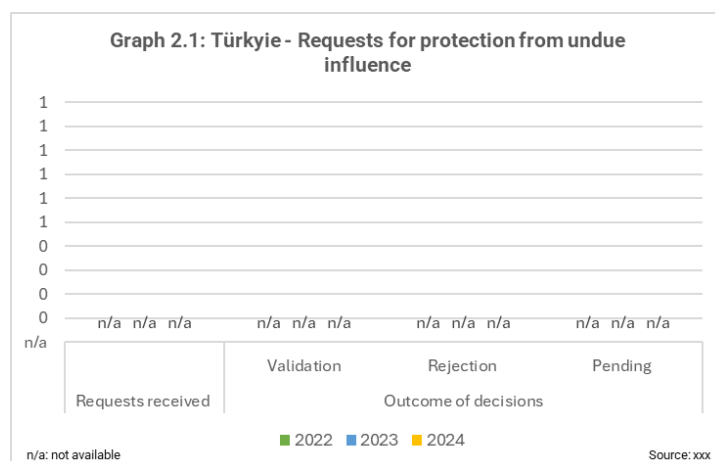
##### Strategic documents

In January 2025, Türkiye adopted the Judicial Reform Strategy (JRS) for 2025-2029, and a judicial reform package in November 2024, but these documents fail to address critical shortcomings in the judiciary. The authorities do not acknowledge key issues of concern, such as the lack of judicial independence, further limiting the potential for meaningful reform. A lack of proper consultation during the drafting process also undermines the effectiveness of these documents.

##### Management bodies

The judicial management bodies are in place, but no progress was made in addressing the lack of independence of the High Council of Judges and Prosecutors (HSK), Türkiye's highest judicial administrative body. None of the judicial members are elected by their peers. The strong influence of the executive in appointing HSK members continues to undermine the judiciary's autonomy. Members of the HSK do not enjoy security of tenure and functional immunity, which are key safeguards of their independence. The President of the HSK, who is also the Minister of Justice, is not elected by HSK members and enjoys very broad powers, particularly regarding inspections and investigations of judges and prosecutors. The decisions of the HSK cannot be subject to judicial review, thus preventing an independent body from assessing the fairness and legality of its decisions.

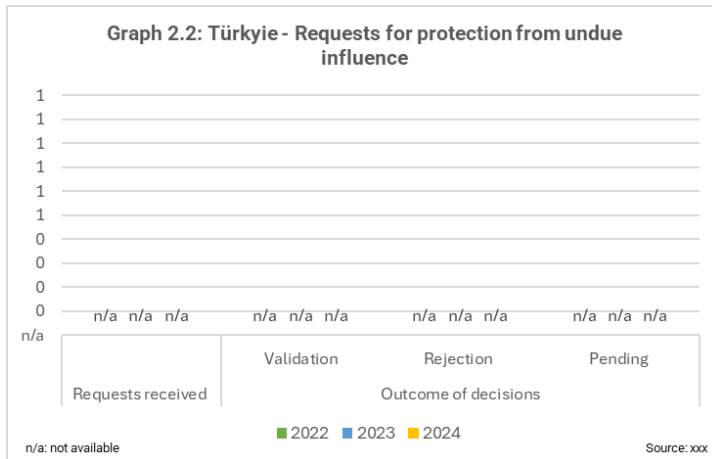
##### Independence and impartiality



The independence and impartiality of the judiciary needs to be improved in the higher-level courts and is problematic in the courts of first instance.

Despite constitutional guarantees of judicial independence and the separation of powers, significant challenges persist due to executive influence on the HSK. In many instances, lower courts continue to ignore or delay the implementation of Constitutional Court rulings.

These shortcomings remained unaddressed in either the new JRS or the recently adopted legislation. Politicisation remains a major concern, with senior government officials frequently interfering in ongoing cases by publicly criticising defendants and indicating members of opposition parties as potential suspects. Such actions exert undue pressure on judges and prosecutors, compromising their ability to perform their duties impartially.



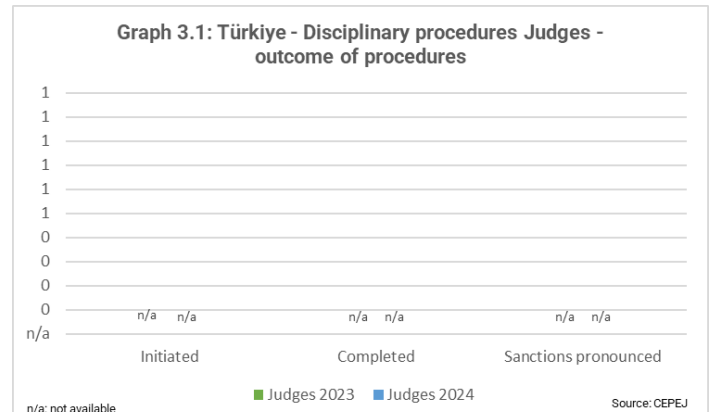
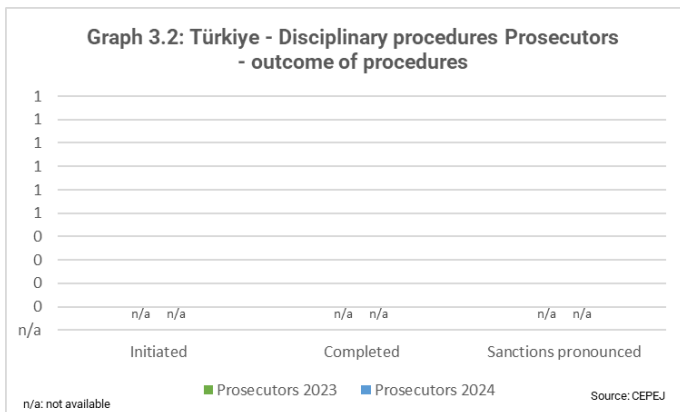
The judiciary continues to target opposition figures, journalists, civil society, and human rights defenders, often relying on vague legal definitions that enable discriminatory interpretations. The failure to address these issues in the JRS raises questions about the political will to improve the rule of law. High-profile cases, such as the arrest of the mayor of Istanbul who is also the presumptive presidential candidate of the opposition, have

deepened concerns about the independence of the judiciary.

No progress was made to improve transparency in the selection, recruitment and promotion of judges and prosecutors. The Ministry of Justice continues to oversee selection boards for new judges and prosecutors. Moreover, judges are frequently removed from cases or transferred without their consent, particularly when their rulings conflict with government interests. The lack of clarity in the case file distribution system can give rise to questions on impartiality of the process.

### Accountability

The accountability of the judiciary did not improve. The effectiveness and the transparency of asset declarations by the judiciary needs to be improved. Despite public allegations of



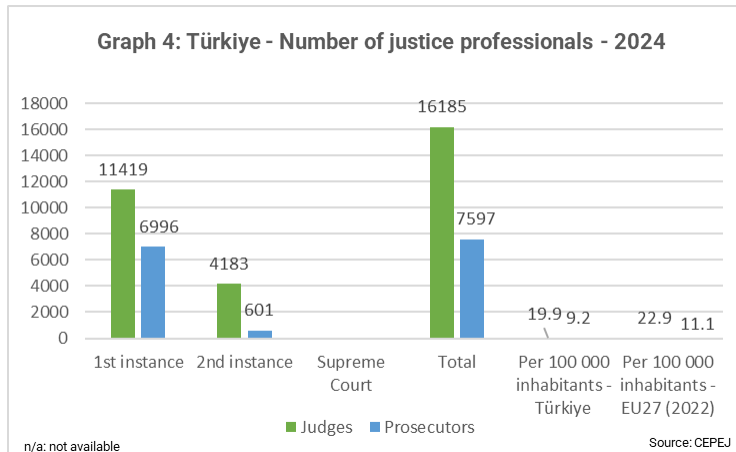
corruption in the judiciary, no information is available on the investigation and the follow-up to such allegations. Judges and prosecutors are required by law to declare their assets upon assuming office, every five years, and upon leaving office. Although the legal framework is strong, its practical enforcement is limited due to lack of oversight and inconsistent disciplinary procedures. There is also no publicly available information on sanctions applied to non-compliant or corrupt individuals, highlighting the need for strengthened oversight and greater transparency to ensure judicial accountability.

### Quality of justice

The quality of justice needs to be improved.

Indictments frequently lack thorough legal reasoning and solid evidence, resulting in prolonged proceedings that undermine public confidence in the judiciary. These inadequacies are rooted in vague and broad legal texts, which grant prosecutors and courts wide discretion in interpreting laws. This has also created a pattern of discriminatory

application of the law, with selective targeting of opposition figures and critical voices in general. The omnibus law adopted in February 2025, which allows the Savings Deposit Insurance Fund of Türkiye (TMSF) to appoint trustees to private companies, raises concerns as it allows public authorities to intervene in private companies, creating a climate of intimidation to suppress dissent and silence independent voices. As part of the corruption investigation into the Istanbul Metropolitan Municipality, the TMSF appointed trustees to 24 companies belonging to some of the 101 suspects, including the mayor of Istanbul.

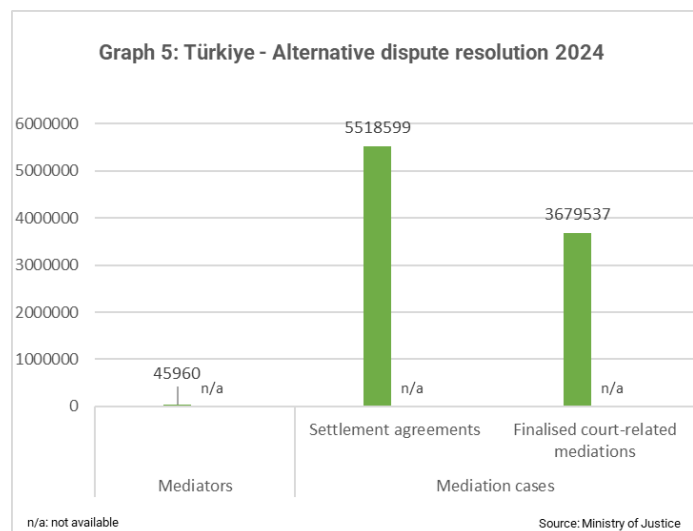


The Justice Academy continued to provide pre-service training for candidate judges and prosecutors as well as in-service training. However, since the Academy is overseen by a president appointed directly by the President of the Republic, its functional independence from the executive branch is constrained.

A growing concern is the questionable evidence used by the prosecutors in politically

charged cases. Several people were charged with ‘supporting a terrorist organisation’ for entering into a political non-competition agreement between two parties during the 2024 local elections that enabled them to secure victories in competitive races. A similar political agreement involving the ruling parties was not prosecuted. Such cases illustrate how judicial mechanisms are selectively used to stifle political opposition and critical voices. Lawyers of defendants were detained and arrested, *de facto* limiting the rights of defence.

In high-profile cases, the fundamental rights of the defence are often neglected. Defence lawyers continue to face significant challenges in accessing case files, particularly in political criminal cases. Additionally, the use of evidence from secret witnesses, who cannot be cross-examined by the defence, continued in several important cases and



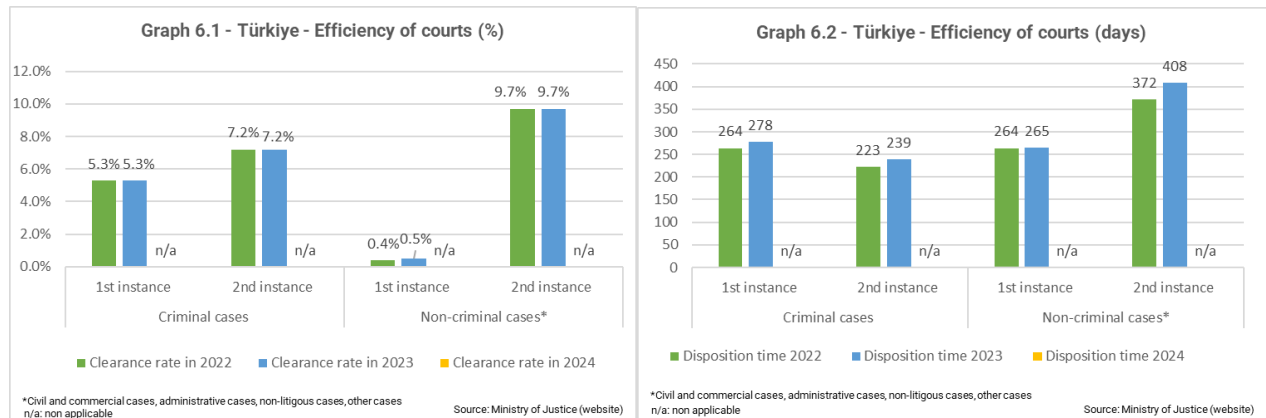
is a matter of serious concern given its clear interference with the right to a fair trial. Despite legal provisions requiring corroborating evidence, statements from single witnesses are often accepted without additional verification. Furthermore, testimony of a single witness was used in multiple cases, further undermining the integrity of the judicial process. These practices are not in line with the jurisprudence of the ECtHR.

### Efficiency

The efficiency of the judiciary system needs to be improved. The judiciary struggles with inefficiency, including a significant backlog of cases, which remains a problem. Legal proceedings are prolonged because indictments are often accepted without sufficient

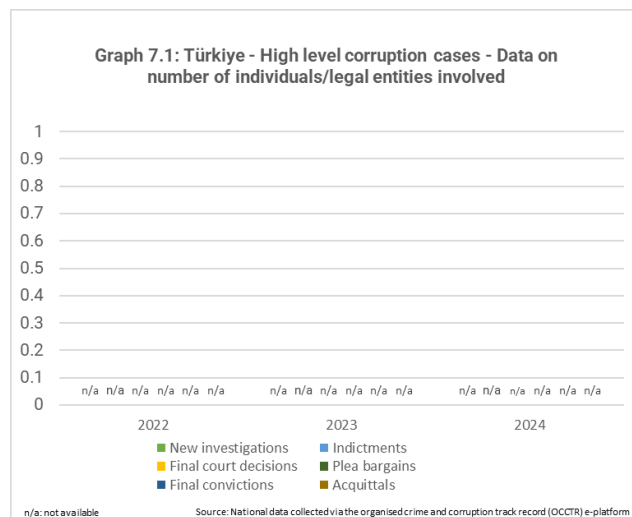
evidence. The frequent transfer of judges and prosecutors, coupled with the appointment of inexperienced personnel to high-level criminal courts, further exacerbates these inefficiencies.

In 2025, the budget for the justice system increased to TRY 280 billion, up from TRY 207 billion in 2024.



## Fight against corruption

### Track record



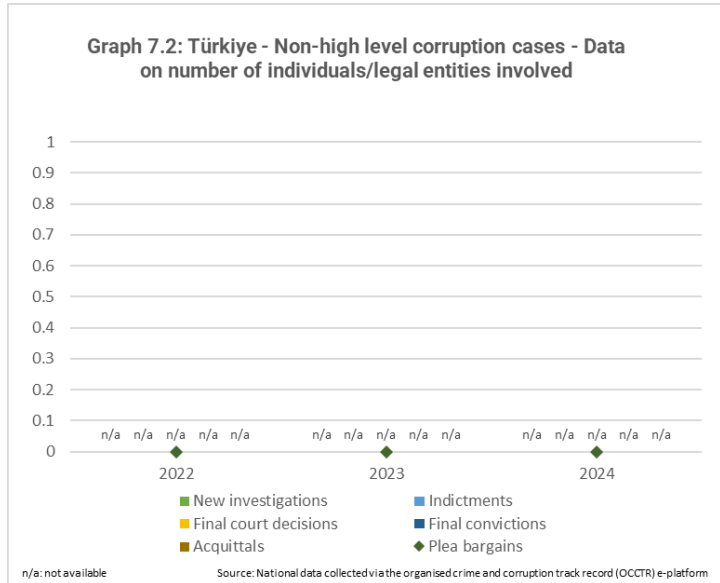
The fight against corruption track record did not improve for either high-level or non-high-level cases.

The track record of investigations, prosecutions and convictions in corruption cases needs major improvement. There is insufficient cooperation between audit and inspection units and prosecution offices. Frequent exemptions in procurement procedures weaken the integrity of public procurement processes. Political party financing, the judiciary, the public administration, municipalities, and the construction sector remain vulnerable to

corruption.

In the reporting period, several mayors from opposition parties – including the mayor of Istanbul – were detained and arrested for corruption and bid-rigging allegations. The defendants face various charges, including ‘leading a criminal organisation’, ‘bribery’, ‘embezzlement’, ‘aggravated fraud’, and ‘rigging public tenders’. The details of the investigation and evidence remain undisclosed. The court rejected the charge of ‘supporting a terrorist organisation’ against the mayor of Istanbul – thus no trustee was appointed in Istanbul – but the prosecutor appealed this decision. The case is pending in court.

Local government authorities remained prone to corruption. In 2024, out of 1 701 complaints filed against municipalities for corruption, misconduct, and related issues, the Ministry of Interior permitted only 176 investigations. Opposition mayors are more frequently prosecuted on corruption-related charges, particularly in the big metropolitan municipalities. No current or former metropolitan mayor from the ruling parties has been subjected to anti-corruption prosecutions. The selective application of justice and the use of corruption investigations as a tool to pressure opposition politicians undermine confidence in the actual fight against corruption. Ensuring impartiality and transparency in anti-corruption efforts is essential to maintain public trust in democratic governance and the rule of law.



### Legal framework

Türkiye is a signatory to all key international anti-corruption conventions, including the UN Convention against Corruption. However, it has not introduced anti-corruption legislation or reforms to meet its obligations under these instruments. The legal framework for whistle-blower protection and public procurement is yet to be aligned with European standards. The corruption-related rules in the Penal Code are inadequate. The definition of active bribery in the Criminal Code does not meet international standards, especially on bribery in the private sector.

Public procurement legislation needs reform to ensure alignment with the EU *acquis*, particularly in the areas of exemptions, concessions, and public-private partnerships. Legal privileges for public officials – such as the need for prior authorisation before investigating alleged misconduct – provide undue protection, thus obstructing anti-corruption efforts.

The legal framework for managing conflicts of interest, asset declarations, and financial oversight of political parties remains insufficient.

### Strategic documents

Türkiye does not have a national strategy or action plan to combat corruption. There was no progress in implementing outstanding recommendations from the Group of States against Corruption (GRECO). Türkiye needs to align with the recommendations of GRECO's Fourth Evaluation Round, which focuses on preventing corruption among MPs, judges and prosecutors. In its latest evaluation report, published in 2023, GRECO concluded that Türkiye had satisfactorily implemented only three of the 22 recommendations. Of the remaining recommendations, nine had been partially implemented, while 10 had not been implemented at all.

### Institutional framework

Türkiye still lacks a permanent, functionally independent body dedicated to preventing corruption. Coordination between various anti-corruption bodies is insufficient. The legal



framework for combating corruption in the private sector remains insufficient. Türkiye lacks specialised law enforcement agencies, prosecutorial services and courts.

## Fundamental rights

### General framework

The implementation and enforcement of fundamental rights is insufficient and deteriorated in the reporting period. Türkiye urgently needs to align its human rights-related legislation and its anti-terror legislation, as well as their implementation, with European standards, the ECHR, ECtHR case law, and the Venice Commission’s recommendations. Persistent issues are yet to be addressed, such as arrests of activists and journalists, selective application of the law, restrictions on media freedom, and the disproportionate use of anti-terror laws.

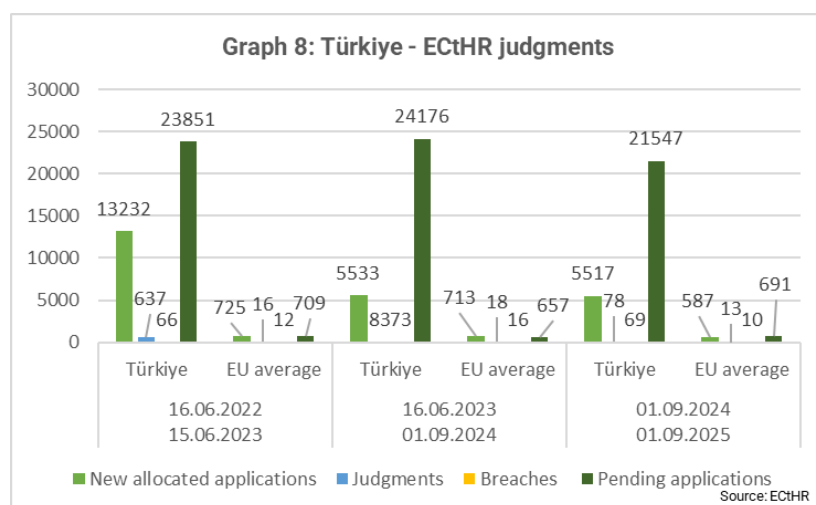
### International human rights instruments

The cooperation with international human rights monitoring bodies and the follow-up to their recommendations are insufficient. Despite Türkiye being a signatory to numerous international human rights instruments, its domestic legislation as well as its implementation still fall short of alignment with the ECHR and the case law of the ECtHR. The Parliamentary Assembly of the Council of Europe continues to subject Türkiye to a full monitoring procedure due to concerns regarding human rights standards. A youth Turkish delegate to the Congress of Local and Regional Authorities of the Council of Europe was arrested in August 2025 following his intervention during a plenary session on charges of ‘spreading misleading information to the public’. Later, he was released pending trial. The charges set a concerning precedent of attempting to restrict the freedom of expression within an international organisation to which Türkiye is a member.

### European Court of Human Rights

The implementation of ECtHR judgments remains inadequate.

During the reporting period, the ECtHR delivered 69 judgements against Türkiye. The Court found breaches of the European Convention on Human Rights relating mainly to the right to a fair trial, respect for private and family life, right for liberty and security, and freedom of expression. Currently, there are 205 cases under enhanced supervision by the Committee of Ministers related primarily to right to life and protection against torture, right to peaceful assembly, unjustified and extended detention without reasonable suspicion and lack of effective investigations (185 cases last year).



No progress was made on aligning legislation on human rights and its implementation with the ECHR and ECtHR case law, which raises serious concerns. Türkiye still did not implement certain ECtHR rulings and the related judgments of its own Constitutional Court. Türkiye needs to address systematic issues such as judicial independence, judicial review mechanism,

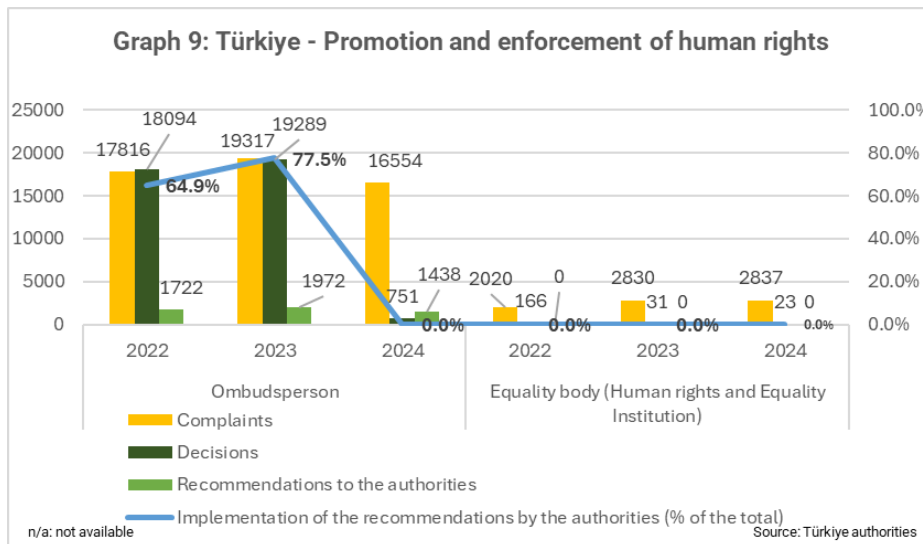
use of excessive force by security forces, unjustified detention, the right to a fair trial, the right to liberty and security, and the freedom of assembly and association.

### Promotion and enforcement of human rights

The legal and institutional framework for the promotion, protection and enforcement of human rights is incomplete and needs to be improved.

The 2021-2023 Human Rights Action Plan, which did not fully address the serious shortcomings in the protection of human rights in Türkiye, expired and was not replaced.

The effectiveness of Türkiye's Human Rights and Equality Institution (HREI) and the Ombudsman remains limited. The HREI's legal and institutional framework should be adapted to fully comply with the Paris Principles, and adequate and secure resources should be allocated to the bodies to effectively perform



their duties. No progress was made in strengthening the operational, structural and financial independence of these bodies or in ensuring an impartial process to appoint their members. Their ability to serve as independent oversight bodies remains limited, which significantly undermines trust in the mechanisms designed to safeguard human rights.

Despite a high number of human rights-related complaints submitted to oversight bodies, there is little evidence of substantial institutional responses.

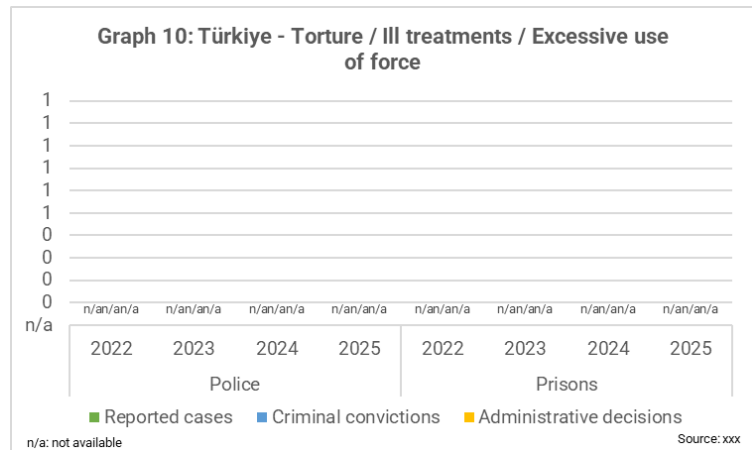
Türkiye lacks a national action plan that defines the responsibilities of public institutions in preventing violations of fundamental rights through corporate activities. Türkiye needs to align with the EU Corporate Sustainability Due Diligence Directive, as the absence of legal and regulatory oversight leaves significant gaps in corporate accountability for human rights abuses.

### Right to life

The impunity of security services remains a critical concern, with no substantive steps taken to address the situation regarding past extrajudicial killings and arbitrary executions. Cases of alleged deaths caused by state agents between 1993 and 1996 continue to fall under statutes of limitation, preventing accountability and justice for the victims.

### Prevention of torture and ill-treatment

Türkiye provides insufficient legal guarantees for the prevention of torture and ill-treatment and the follow-up to cases is insufficient. Cases of torture and ill-treatment continue to be reported. Although in a few cases administrative measures were taken against officers, such responses remain insufficient and limited in scope. Credible allegations of abuse by prison officials remain unaddressed. Instances of ill-treatment were particularly notable during the protests following the arrest of the Istanbul mayor. Reports highlighted the disproportionate use of force by security forces, including physical abuse and psychological intimidation. The European Committee for the Prevention of Torture and Inhuman or Degrading Treatment or Punishment (CPT) carried out a visit to several prisons and detention centres in Türkiye in April 2025, to assess the treatment and legal safeguards provided to those detained during the protests that began on 19 March.



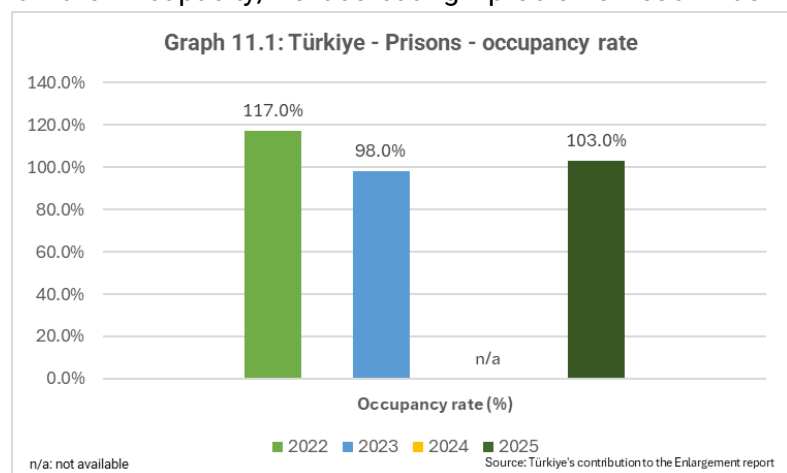
Despite Türkiye’s obligations under the Optional Protocol to the UN Convention against Torture and Other Cruel, Inhuman, or Degrading Treatment or Punishment, no progress was made in improving the compatibility of the HREI – as the national preventive mechanism – with the Protocol’s key requirements. The prison visits conducted by the HREI proved ineffective in addressing allegations of torture, maltreatment and abuse. The HREI still fails to effectively handle cases referred to it, raising questions about its operational capacity and efficacy. Türkiye should take concrete measures to strengthen the enforcement of the right to life and the prevention of torture and ill-treatment. The requirement to obtain permission to prosecute civil servants (including security officers) should be reformed or abolished to address systemic impunity and improve accountability. Türkiye should allow the publication of pending reports from the CPT and introduce procedures for the automatic release of these reports to ensure transparency and adherence to international obligations.

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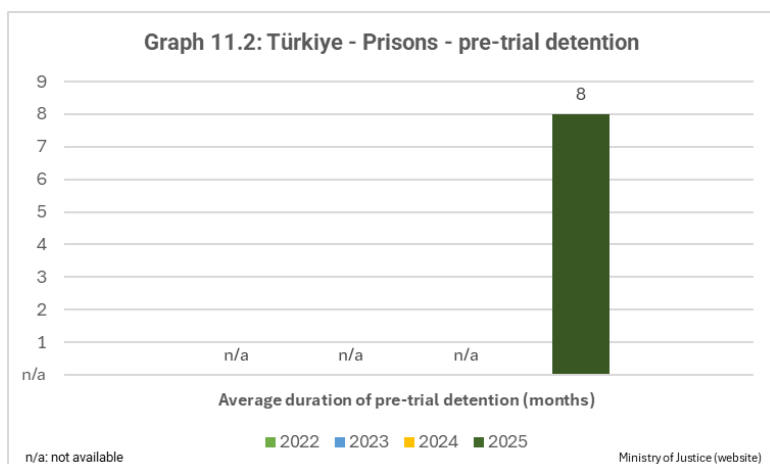
Execution of criminal sanctions

The system for execution of criminal sanctions (including probation) needs to be improved.

Turkish prisons operate beyond their capacity, exacerbating problems such as overcrowding, inadequate living environments, and limited access to basic resources. Pre-trial detention remains widely used, including for cases involving alleged offences related to freedom of expression and the right to peaceful assembly. No progress was made in addressing the arbitrary decisions by the Prison Administration and Observation Boards, which often delay inmates’ conditional releases



without clear justification.



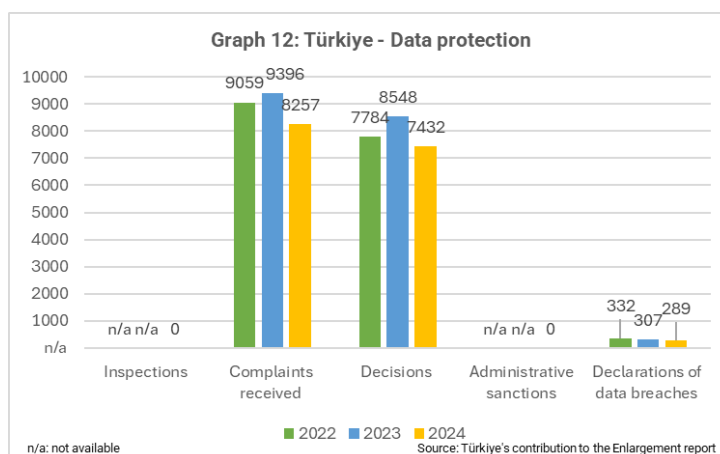
Reports of human rights violations in prisons increased. Political inmates continue to face discriminatory treatment, highlighting unequal standards within the prison system. Urgent action is needed on access to education, healthcare, rehabilitation, and resocialisation programmes, as well as to improve the probation system. Inmates are often subjected to arbitrary limitations on communal

activities. The conditions of PKK leader Öcalan and three other inmates at İmralı prison improved, as they were allowed visits during the reporting period.

### Protection of personal data

The legal framework for the protection of personal data is not adequate and the capacities of the data protection agency need to be improved.

Türkiye's Personal Data Protection Authority continues to operate under the framework established by the 2016 personal data protection law. However, this legislation does not fully comply with the EU *acquis* on data protection, particularly regarding privacy safeguards, legal consistency, and enforcement mechanisms.



Despite its role in overseeing data protection regulations, the Authority's operational framework does not fully align with European standards. Serious gaps remain in ensuring transparency, accountability, and adequate enforcement of personal data rights, particularly in cases involving law enforcement agencies. Further legislative improvements are necessary to ensure stronger protection for individuals and strengthen regulatory independence and oversight.

### Freedom of religion or belief

Türkiye provides generally adequate legal guarantees for freedom of religion or belief.

Freedom of worship is generally respected in Türkiye, but the situation of freedom of thought, conscience and religion needs to be improved. The Venice Commission's recommendation to allow the Greek Orthodox Ecumenical Patriarch to use the title 'Ecumenical' was not implemented consistently. The lack of legal personality for the non-Muslim and Alevi communities remained an unresolved issue, notably in relation to the lack of legal status for places of worship. The Venice Commission's recommendations to grant legal status to non-Muslim religions are yet to be implemented. There are still no legal provisions on the conscientious objection to army service, despite several ECtHR judgments,

a Council of Europe Committee of Ministers resolution and a decision by the UN Human Rights Committee. Foreign Protestant pastors and Jehovah's Witness ministers were deported. An ECtHR judgment is to be finalised soon on this issue. Atheists and agnostics face discrimination, stigmatisation, social pressure, or restrictions on their right to education. The Turkish education system still fails to guarantee neutrality and impartiality towards various religions, denominations and beliefs. No measures were taken by the authorities to address the shortcomings identified by the ECtHR in compulsory religious culture and ethics classes.

No steps were taken to reopen the Halki (Heybeliada) Greek Orthodox Seminary, which has been closed since 1971. The UNESCO World Heritage Committee's concerns about the Hagia Sophia and Chora museums having been converted into mosques remained unaddressed. Acts of vandalism and the destruction of minority places of worship continued. High-level officials and the media used aggressive anti-Semitic statements in the context of the conflict in Gaza. Hate crimes against religious minorities need to be effectively investigated.

### **Freedom of expression**

Türkiye provides insufficient legal guarantees for the freedom of expression. The enabling environment for media freedom and pluralism is constrained.

#### Intimidation of journalists

The environment for journalists and media professionals, and other critical voices in Türkiye, remained restrained through arbitrary arrests, detentions, prosecutions and convictions. Between September 2024 and September 2025, according to CSOs working in the area of media freedom 62 journalists and media workers were arrested, imprisoned, or remained in pre-trial detention (51 in the same period in 2023-2024). Media outlets critical to government were at times selectively subjected to fines by the media regulator. Such practices perpetuate a culture of self-censorship.

#### Legislative environment

No steps were taken to align rules related to anti-terrorism, national security, public order, disinformation, and the protection of public morals with international and European standards. Access to information continued to be often restricted under the pretext of protecting national security. Furthermore, a new cybersecurity law, enacted in March 2025, would penalise whistle-blowers if the authorities declare their reports on cybersecurity-related data breaches to be false. There are concerns that the law could be used to silence independent reporting and further restrict access to information. The law introduces new criminal offences with severe penalties even for circumstances that are not directly linked with cyberattacks.

#### Implementation of legislation/institutions

The enforcement of existing legislation does not align with European standards and remains selective and discriminatory. The Radio and Television Supreme Council (RTÜK) continued to lack independence and the imposition of fines in a discriminatory manner is common. Fines were frequently justified on grounds that content was 'contrary to national and moral values', or on the basis of 'general morality' or 'protection of the family'. Media outlets and websites were targeted with accusations of 'propagating terrorism', 'obscenity', 'defaming Islam', 'insulting the President', or 'compromising national security'. Content critical of the government, including reports on corruption, the economic situation, election coverage, and sensitive social issues, was often penalised.

### Public service broadcasters

The coverage of public service broadcaster Turkish Radio and Television Corporation (TRT) continued to heavily favour ruling parties, undermining the principle of impartiality.

### Economic factors

Media ownership in Türkiye remains highly concentrated in the hands of few economic players close to the government, as the broadcasting law does not include rules to prevent monopolisation. The selective allocation of public advertising funds and distribution of printed media (controlled by a single company) continue. Media outlets related to officially recognised religious minority groups receive very limited revenue from public advertisements, making their financial sustainability challenging.

### Internet

The legislation fails to guarantee an open and unrestricted internet. Access to websites, specific news articles and social media accounts critical of the government is often blocked, and authors often face prosecution. Authorities frequently imposed temporary restrictions on social media platforms, or slowed down (throttle) their services, particularly during protests or crises. Furthermore, the government requested closure of hundreds of X accounts belonging to journalists, political figures, women's groups, youth groups and activists, often in the absence court orders. Concerns also persist regarding licensing requirements for internet broadcasting, as these are used to facilitate censorship and limit online access. A change in Google's algorithm reduced the visibility of some independent news sites in Türkiye, negatively affecting their revenues. It led to closure or downsizing of some media outlets.

### Freedom of artistic expression

Legislation with vague provisions such as 'morality' is often used to restrict freedom of artistic expression. Artistic events and performances were banned, and artists critical of government policies faced derogatory remarks from high-ranking officials and pro-government media. These restrictions stifle cultural and creative expression, further narrowing the space for critical voices. Artists who spoke against the arrest of mayors and supported boycott calls were dismissed from TV series run on state-owned TRT.

### Professional organisations and working conditions

Journalism in Türkiye remains a precarious and risky profession, with low wages, a high risk of prosecution, limited trade union rights and no job security (see also *Chapter 10 – Digital transformation and media*).

### Freedom of assembly and association

Türkiye provides insufficient legal guarantees for freedom of assembly and association, and regulation of assemblies is restrictive.

Legislation governing the right to assembly and demonstration, along with its practical implementation, remains inconsistent with European standards and falls short of guarantees provided also in the Turkish Constitution. The Council of Europe's Committee of Ministers had urged the authorities to amend the Law on demonstrations and meetings in line with the case law of the ECtHR and the Constitutional Court. Authorities continued to impose blanket bans on public gatherings and demonstrations based on vague, discretionary and often arbitrary criteria, undermining the constitutional right to freedom of assembly. Following the arrest of the Istanbul mayor in March 2025, hundreds of thousands of people in various cities protested his detention and suspension from office. Over 2 000

individuals were detained during the protests, with over 800 subsequently arrested pending trial. Detentions and arrests took place also following the International Women's Day celebration and the Newroz celebrations in March 2025. According to the Minister of Interior, at least 409 people were detained on 1 May on grounds of 'non-authorised demonstrations'. While official statistics on the number of protesters injured have not been provided, credible reports documented aggressive crowd-control measures, and ill-treatment by security forces, including physical and psychological abuse. The authorities have dismissed these allegations as baseless. There is an urgent need to address arbitrary restrictions on public gatherings, ensuring accountability for disproportionate law enforcement practices, and protecting people's right to peacefully express their views.

Although freedom of association in Türkiye is guaranteed by the Constitution and international agreements, legislation imposes numerous legal barriers and administrative pressures on NGOs and labour unions, particularly those critical of the government. Associations face challenges to gain public benefit status or benefit from public support. The requirement to keep numerous documents and the inequalities in access to digital systems are particularly challenging for small and local associations. Inspections are often carried out by security units, which is viewed as excessive and intimidating.

#### Property rights

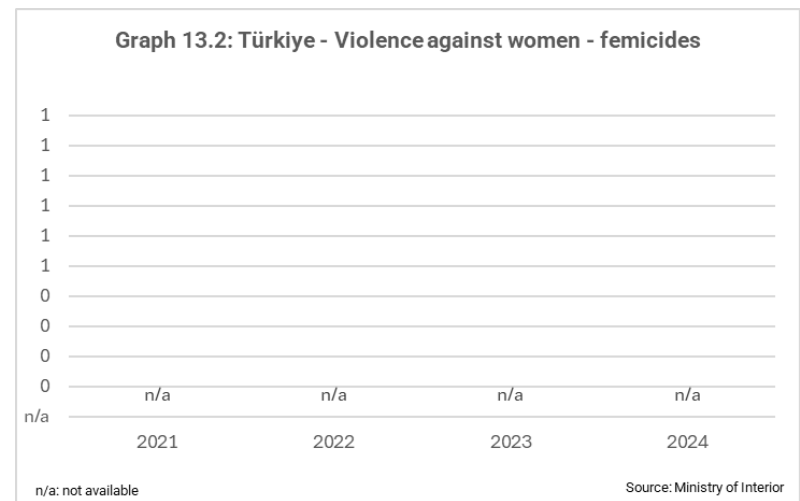
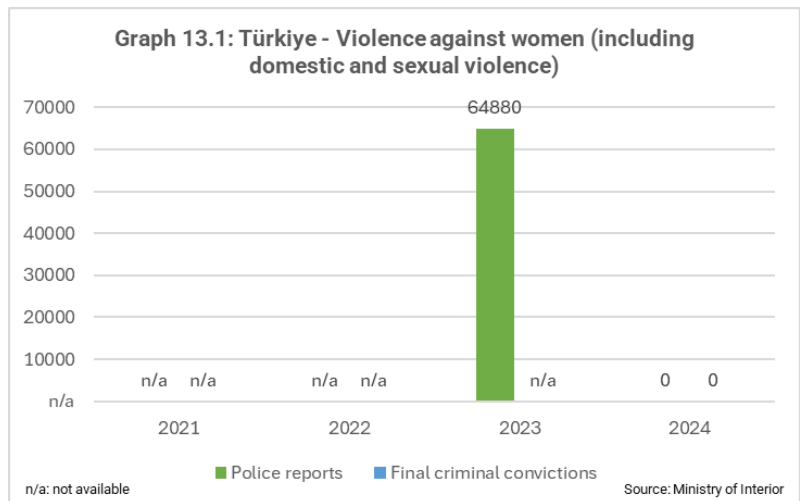
The legal framework in this area is mostly in place. However, there are still some legislative shortcomings, in particular related to property rights for non-Muslim minorities, and its implementation is often selective and discriminatory. The Mor Gabriel Syriac Orthodox Monastery property issues and court cases continued. Court cases regarding the 2016 expropriations in Diyarbakır's Sur district continued. Property rights of people who lost their lands and immovables in the February 2023 earthquakes need to be urgently addressed, especially in Hatay, where no comprehensive restoration plans for cultural and religious heritage were developed. Council of Europe Resolution 1625 of 2008 on property rights on the islands of Gökçeada (Imbros) and Bozcaada (Tenedos) still needs to be fully implemented.

#### Non-discrimination

The legal and institutional framework on non-discrimination is incomplete and equality bodies' capacities need to be improved. In addition, the legal and institutional framework on hate crime and hate speech is not in line with the EU *acquis* and European standards. Türkiye made no progress in revising non-discrimination legislation to ensure alignment with EU *acquis* and European standards, including as regards the Racial Equality Directive and the Directives on standards for equality bodies. Similarly, no progress was made towards ratifying Protocol No. 12 of the ECHR providing for a general prohibition of discrimination. Instances of discrimination continued to be reported, particularly in relation to ethnicity, religion, and sexual orientation. The situation of LGBTIQ persons is particularly worrying. Türkiye could draw useful guidance from the EU Anti-racism Action Plan to adopt its own Anti-racism strategy. Existing legislation on hate offences, including hate speech, still diverges significantly from the EU *acquis* and European standards, leaving vulnerable groups without adequate legal protection against bias-motivated crimes. Hate attacks against Kurds, Christian and Jewish minorities and Syrians continued. Alevis were also the subject of attacks.

#### Gender equality

The legal and institutional framework on gender equality and combating gender-based violence is incomplete and implementation and enforcement are insufficient. The 2024 Vision Document for Strengthening the Family – which puts the traditional family at the centre of government policies – continued to be implemented. The document is characterised by a strong discourse that prioritises the ‘traditional’ family, and casts ‘gender ideology’ as one of the major threats to the family institution. Although Türkiye has in place a legislative framework and some policy initiatives that aim to address violence against women and girls, significant gaps persist in implementation, access to services and legal enforcement, making the issue systematic and widespread. Women’s rights centres and legal aid offices of bar associations provide free legal support to victims of violence. However, delays in requests for legal aid can lead to loss of time in protecting the victim. A lack of resources hinders bar associations’ ability to quickly respond to every application.



The legal framework was weakened further by Türkiye’s withdrawal in 2021 from the Istanbul Convention on preventing and combating violence against women and domestic violence. The implementation of legislation remains inconsistent, with perpetrators often benefiting from judicial leniency and impunity. Law enforcement’s approach often treats violence against women and girls as a private family matter, which contributes to impunity. According to We Will Stop Femicide Platform data, in 2024, there were 394 femicides and 259 suspicious deaths of women. This is the highest number recorded since the platform began collecting data in 2010. The lack of a comprehensive official data collection system on femicides also remains a serious concern.

Rights of the child

The legal and institutional framework on rights of the child is incomplete and its implementation and enforcement are insufficient. The legislation on the rights of the child and its implementation are not in line with international standards and the EU *acquis*. Also, the budget allocated to this area is insufficient. Although the principle of the ‘best interest of the child’ is recognised in the legal framework, its application frequently relies on subjective judgements rather than consistent criteria.

The existing infrastructure for juvenile justice is still insufficient and significant challenges



persist in ensuring equitable access to justice for minors. NGOs and bar associations struggle to effectively intervene, monitor cases, or pursue strategic litigation due to limited institutional capacity and resources. The number of specialised juvenile courts and child assize courts should be expanded, and staffing should be increased by hiring qualified professionals, including judges, prosecutors, lawyers, and experts trained in child welfare.

Moreover, for several years children have been subjected to investigations, detentions and prosecutions under the Turkish Penal Code and anti-terrorism law for offences such as insulting the President on social media, engaging in terrorist propaganda and violating the Law on demonstrations and marches. Following the protests against the detention of the Istanbul mayor, reports emerged indicating the detention and arrest of several students and minors. Allegations of ill-treatment during these detentions, such as physical abuse and psychological harm, were reported by credible sources.

While the adoption of a Child Rights Strategy and Action Plan (2023-2028) was a positive step forward, significant gaps remain in addressing key issues like violence, child labour, schooling of girls, and early or forced marriages. Data collection mechanisms to monitor trends in violence against children are still inadequate, complicating efforts to identify patterns and design evidence-based policies. High-profile incidents, such as the murder of an 8-year-old girl and a double femicide in Istanbul, highlight failures in existing child protection policies and gender-based violence prevention measures. Türkiye should take decisive action to eliminate child marriages, particularly unregistered religious ones, by enforcing mandatory civil registration for all marriages.

To strengthen child protection systems and ensure effective realisation of children's rights, Türkiye could draw guidance from key European Commission recommendations—such as the EC Recommendation on integrated child protection systems—and align its efforts with broader policy frameworks like the EU Strategy on the Rights of the Child.

### Persons with disabilities

The legal and institutional framework on the rights of persons with disabilities needs to be further aligned with the EU acquis, including in the area of accessibility such as the European Accessibility Act. Its implementation and enforcement need to be improved. Türkiye has a strategic framework to promote the rights of persons with disabilities, yet the level of practical implementation is still insufficient. Türkiye is a party to the UN Convention on the Rights of Persons with Disabilities and its Optional Protocol. Nevertheless, gaps persist in the alignment of the national legislation and practices with the requirements of the Convention. There are legislative barriers that prevent persons with disabilities from holding certain civil servant positions, such as governor or ambassador. The National Action Plan on the Rights of Persons with Disabilities 2023–2025 is broadly consistent with EU strategies, but its practical impact has remained limited. Similarly, the National Action Plan for Persons with Autism Spectrum Disorder (2023–2030) is in place, but tangible results are yet to be seen. Efforts to improve data collection on accessibility and the availability of inclusive public services have been insufficient. Additional investments are needed to make infrastructure and services accessible. There is a need to increase the accessibility of work environments, including physical spaces, digital tools, communication, and transportation to and from the workplace.

Türkiye needs to strengthen data collection on children with disabilities to ensure adequate access to services and guide disability inclusion. Early detection and cross-sector collaboration for timely intervention needs to be improved for children with disabilities, particularly in the education and health sectors.

Türkiye maintains a deinstitutionalisation policy for people with intellectual and mental disabilities, supplemented by a community-based care support programme. However, opportunities for independent living remain scarce. The Commission Guidance on independent living and inclusion in the community of persons with disabilities in the context of EU funding (C/2024/7188) could serve as a guiding document in this respect.

### LGBTIQ persons

The legal protection of the rights of lesbian, gay, bisexual, transgender, intersex and queer (LGBTIQ) persons is insufficient and not aligned with the EU *acquis*. Moreover, LGBTIQ persons are subject to discrimination, hate speech and stigmatisation.

The protection of fundamental rights for LGBTIQ individuals in Türkiye remains a major concern, as discriminatory practices and restrictions on freedoms persist. Episodes of hatred targeting individuals based on their sexual orientation and gender identity continue to be reported. Negative stereotyping in the media, along with inflammatory rhetoric from high-ranking government officials, further exacerbated the marginalisation of LGBTIQ individuals and communities. With the launch of the 'Year of the Family' in January 2025, these verbal attacks further increased. The government's 2024-2028 Vision Document and Action Plan for Strengthening the Family frequently refers to 'harmful trends threatening the family', 'global desexualisation projects' and 'national and spiritual values'. Authorities have allowed the organisation of anti-LGBTIQ rallies, granting official permissions for demonstrations that promote exclusion and discrimination, while gatherings expressing opposing views are regularly banned by the authorities. In 2025, the Kuir fest (Queer fest) and the Pride March in Istanbul were officially prohibited.

### Procedural rights and victims' rights

The legal framework on procedural rights for suspects and accused as well as the rights of victims of crime is insufficiently aligned with the EU *acquis* and systemic issues in application persist. There are significant inconsistencies compared with the EU *acquis* and broader European standards (see *Quality of justice*). Prolonged periods of pre-trial detention remain common. This issue is compounded by instances of detention linked to the exercise of fundamental constitutional rights, such as the right of assembly and the freedom of speech. Issues of compliance with fair trial standards and the rights of defence further erode confidence in the judicial process. These include concerns over evidence being unreliable or gathered in violation of procedural safeguards, including the admission as evidence of testimony by secret witnesses, who cannot be cross-examined by the defence. Further efforts need to be made to fully align the national legislation with the Victims' Rights Directive and the Directive relating to compensation to crime victims. In rural areas and among disadvantaged groups, public awareness of the availability of legal aid remained limited.

### Protection of minorities

The legal and institutional framework for the protection of persons belonging to minorities is incomplete and persons belonging to minorities face hatred and discrimination.

Legislation on hate crimes is still not in line with European standards and remains a serious issue. Hate speech and hate crimes continued, with the main targets being Syrians, Greeks, Armenians, Jews and Alevis. After the fall of Assad's regime in Syria and the attacks on Alawites, hate speech against Alevis increased, including from public officials and political figures. In January 2025, the Constitutional Court ruled that barring two Greek Orthodox clerics from being elected on a foundation's board violated their right to freedom of association. Overall, persons belonging to minorities continued to face difficulties, such as

the lack of legal status for their religious institutions, protection for minority languages, schooling support, clergy training, access to media in minority languages, legal restrictions on access to public advertisements by minority media outlets and complications in enjoying property rights. No steps were taken to revise school textbooks to remove discriminatory and derogatory references. Minority schools received no public funds. Outside activities for the 'Armenian Genocide Commemoration Day' were prohibited in April 2025. The court case concerning the retrial of state officials involved in the murder of Armenian journalist Hrant Dink was concluded in February 2025, but the Dink family appealed the decision on the grounds of 'incomplete investigation and prosecution'. There are still no mechanisms in place to include persons belonging to minorities in decision-making and ensure that they are adequately represented in public administration. Minorities are seriously under-represented in political life.

### Cultural rights

Legal restrictions on mother-tongue education in primary and secondary schools remained in place. However, with the positive climate brought by the peace initiative on the Kurdish issue, alternatives in mother-tongue education are being publicly discussed. Optional courses in two Kurdish dialects and a few other mother tongues are provided in public state schools, but the requirement of a minimum of 10 students for these courses, along with the insufficient number of appointed teachers, remained an impediment. Six universities continue faculty courses and provide degrees in Kurdish language education.

### Roma<sup>5</sup>

The 2023-2030 National Roma Strategy and its Action Plan are being implemented. Şişli municipality (in Istanbul) won the EU Award for Roma Integration in Türkiye for its activities in the field of inclusion of Roma children in education. Concrete measures are needed to address direct discrimination and prejudices. High levels of inequality in housing, employment and education perpetuate marginalisation and social exclusion. Integration of Roma children into the education system would help eliminate child labour and early marriages. The problem of incorrect diagnosis of Roma children with mental disabilities or learning difficulties was not addressed.

## **2.2.2 Chapter 24: Justice, freedom and security**

*The EU has common rules for border and migration management, visa policy, and asylum. Schengen cooperation entails the lifting of border controls within the EU. There is also cooperation in the fight against serious and organised crime and terrorism, and on judicial, police and customs matters, all with the support of the EU justice and home affairs agencies.*

### **Fight against serious and organised crime**

The legal framework on serious and organised crime is partially aligned with the EU *acquis*. The capacity to combat serious and organised crime needs to be improved.

### Legal alignment, strategic and institutional frameworks

Specialised departments dealing with various forms of organised crime still operate primarily within the two law enforcement agencies: the Turkish National Police and the Gendarmerie General Command. Türkiye lacks a dedicated, centralised asset recovery office. Asset seizure and confiscation are managed via general criminal justice procedures.

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<sup>5</sup> In line with the terminology of European institutions, the umbrella term 'Roma' is used here to refer to a number of different groups, without denying the specificities of these groups.

No new specific anti-corruption or integrity measures were introduced in the law enforcement sector during the reporting period. Integrity safeguards and internal oversight mechanisms are still limited and should be significantly strengthened, particularly through independent complaint channels, internal affairs capacity, and clear codes of conduct.

The legal framework for the fight against organised crime and police cooperation is partially aligned with the EU *acquis*. A national strategy (2022-2027) and an action plan (2025-2027) against organised crime are in force. The first action plan (2022-2024) has been concluded.

Türkiye does not currently have a national equivalent to SOCTA (Serious and Organised Crime Threat Assessment) as produced by Europol. However, the Turkish authorities carry out strategic threat assessments on organised crime, though these are generally not made public and are not structured or institutionalised in the same way as SOCTA.

Cooperation with Europol is still limited to the existing Strategic Agreement on Cooperation. As Türkiye's data protection legislation is still not aligned with the EU *acquis*, the exchange of personal data with Europol is still pending.

Türkiye is party to the Council of Europe's Budapest Convention on **Cybercrime** but has yet to sign its Second Additional Protocol on enhanced cooperation and disclosure of electronic evidence. In the reporting period, there was no national strategy or action plan in place against cybercrime. Although Türkiye has ratified the Council of Europe's 'Lanzarote Convention', further alignment is needed with the Directive on combating the sexual abuse and sexual exploitation of children and child pornography.

The legal framework on **trafficking in human beings** is largely in line with international conventions and the EU *acquis*. Türkiye needs to fully align its definition of trafficking in human beings with the Council of Europe Convention on Action against Trafficking in Human Beings. In January 2025, the Migration Board adopted the third national action plan against human trafficking, following a request from the Council of Europe's Group of Experts on Action against Trafficking in Human Beings (GRETA). Legislation on **witness protection** is providing protective measures; however, it needs to be expanded to cover all types of serious crime.

There was an increased involvement of Turkish authorities with the EU in the fight against firearms trafficking and especially the threat of the illegal conversion of alarm and signal weapons manufactured in Türkiye. The changes in the Turkish legislation on alarm and signal weapons are positively received. Türkiye participates in the EMPACT firearms,

#### Implementation and enforcement capacity

The operational capacity of law enforcement agencies continued to be strengthened through new recruitment and training programmes.

A total of 14 EU Member States have liaison officers in Türkiye. A cooperation agreement with the EU Agency for Law Enforcement Training (CEPOL) is in place, but participation from Türkiye in training activities significantly declined compared with the previous reporting period. In 2024-2025, Türkiye took part in eight operational actions within the framework of the European Multidisciplinary Platform Against Criminal Threats (EMPACT) in the fields of migrant smuggling, firearms, and criminal finances, money laundering and asset recovery.

Between September 2024 and April 2025, 31 385 people were arrested for organised crime. Regarding confiscation of criminal assets in corruption and organised crime cases, the Gendarmerie took action against 567 suspects involved in 104 incidents.

Türkiye remains an important transit and destination country for trafficking in human beings. In 2024, the Turkish authorities identified 179 victims (compared with 223 in 2023). As of

March 2025, 43 victims had been identified. Most victims are of Syrian origin. There is still a need to increase the capacity to host and provide effective and professional services to victims of trafficking in human beings and to enhance cooperation with Europol.

Concerns persist about the capacity of law enforcement authorities in Türkiye to effectively handle cases of gender-based violence and to provide adequate protection and support to victims.

### **Cooperation in the field of drugs**

Cooperation in the field of drugs and treatment and rehabilitation capacities need to be strengthened.

#### Legal alignment, strategic and institutional frameworks

The National Strategy and Action Plan against Drugs (2024-2028) is currently in force, with overall coordination entrusted to the Ministry of Health.

The Turkish Monitoring Centre for Drugs and Drug Addiction is the national focal point of the EU Drugs Agency and functions as the national drugs observatory. It is responsible for data collection and risk assessments, and for issuing recommendations within the framework of the national early warning system on new psychoactive substances. A total of 1 068 new psychoactive substances have been included in national legislation, and 23 of these were put on the list in 2024.

#### Implementation and enforcement capacity

Türkiye's geographical position continues to make it a key transit route for drug trafficking between Asia and Europe. Information exchange and collaboration with EU law enforcement partners need to be strengthened. In 2024, Turkish law enforcement agencies carried out operations that led to increased seizures of cannabis, cocaine, methamphetamine, and ecstasy tablets, while heroin seizures declined.

In 2024, Turkish authorities seized approximately 4.8 tonnes of heroin, 62 tonnes of cannabis, 3 tonnes of cocaine, 36 tonnes of methamphetamine, 2 tonnes of synthetic cannabinoids, 16 million amphetamine tablets bearing the Captagon logo, and 5.2 million ecstasy tablets.

In 2025, Türkiye continues to take a decisive stance against drug trafficking, evidenced by historically high seizure rates. The destruction of these drugs is an integral part of Türkiye's anti-narcotics strategy, though the efficiency and environmental impact of these methods necessitate a continuous evaluation.

### **Fight against terrorism and prevention of radicalisation and violent extremism**

The legal framework for the fight against terrorism is not aligned with the EU *acquis*. The fight against terrorism needs to be carried out respecting the rule of law.

The legal framework for countering violent extremism is not aligned with the EU *acquis*. The countering of violent extremism needs to be improved.

The legal framework for critical infrastructure protection and the resilience of critical entities is not aligned with the EU *acquis*. The protection of critical infrastructure and the resilience of critical entities need to be improved.

#### Legal alignment, strategic and institutional frameworks

Given the presence of multiple legitimate domestic and cross-border security threats, Türkiye's counterterrorism efforts remain essential for both the country's domestic security

and the European security architecture. Türkiye has adopted legislation and set up robust institutional frameworks to combat terrorism. However, the legal framework remains flawed and frequently lacks a proper balance between fundamental freedoms and security considerations.

Legislation needs to be brought in line with the EU *acquis*, notably regarding the definition of terrorism as outlined in the EU Directive on combating terrorism, which remains an essential and outstanding reform. Preventive measures are insufficient. There is no comprehensive strategy or political ownership in place for counterterrorism, and preventing/countering violent extremism practices should also respect the rule of law and fundamental rights and freedoms. Türkiye focused its anti-terrorism operations on the PKK, Daesh and the Gülen movement (the latter is not listed as a terrorist organisation in the EU).

Türkiye participates in the EU's biannual review process of terrorist designations under Council Common Position 2001/931/CFSP. The EU currently designates the PKK, the Great Eastern Islamic Raiders' Front (IBDA-C), the Revolutionary People's Liberation Party (DHKP/C), and Teyrebazen Azadiya Kurdistan (TAK) as terrorist groups. Türkiye does not consider Hamas a terrorist organisation, in contrast to the EU, which includes it on its list of designated terrorist entities.

#### Implementation and enforcement capacity

Türkiye's continued anti-terrorism efforts led to a decline in terrorist incidents and an improved security climate. The EU condemned all acts of terrorist violence in Türkiye. However, the politically motivated and overly broad application of counterterrorism legislation continues to undermine the rule of law and fundamental freedoms. There is a persistently growing trend of selective enforcement of counterterrorism laws targeting political opposition to silence dissent and imprison political opponents and journalists.

In March 2025, the country published its first National Strategy Document for Enhancing Effectiveness in Combating the Financing of the Proliferation of Weapons of Mass Destruction 2025-2029.

In 2024, MASAK filed criminal complaints against 148 individuals on money laundering charges.

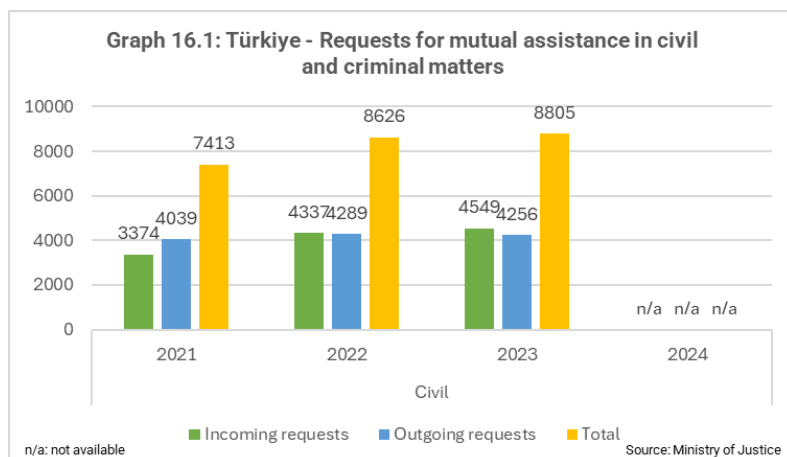
Türkiye strengthened its system for the confiscation of criminal assets. In terms of managing recovered assets, a legal provision adopted in February 2025 allows the court to appoint the Savings Deposit Insurance Fund as a trustee for up to 5 years. This should apply in cases where there is strong suspicion of money laundering or terrorist financing offences.

Sanctions imposed by the UN resulted in the freezing of assets belonging to two individuals and three organisations in 2024 and 2025. During the same period, three inter-ministerial decisions led to the freezing of assets of 53 individuals and 19 companies in Türkiye.

Police and judicial cooperation with EU Member States and EU agencies in the fight against terrorism remained limited due to the absence of a law on the protection of personal data in line with the EU *acquis*, as well as differences in the definition of terrorism. These requirements are included, among others, in the EU-Turkey Visa Liberalisation Roadmap and remain unfulfilled. As Türkiye's data protection legislation is still not aligned with the EU *acquis*, the conclusion of an international agreement for exchange of personal data, including related to terrorist suspects, with Europol remains pending. In the absence of such an agreement, transfers of data related to terrorist suspects and other persons posing a threat known to Türkiye from the Turkish side to Europol remain limited.

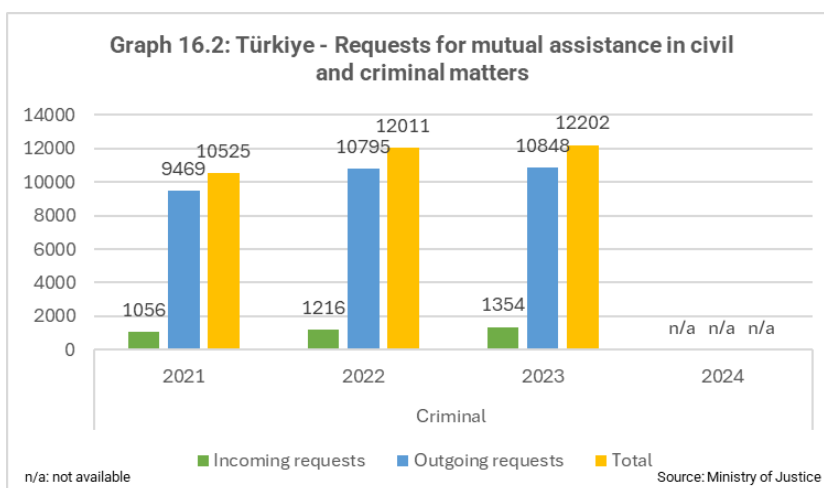
MASAK and the Ministry of Interior engaged with civil society organisations to promote risk-based AML/CFT oversight. In 2024, the Constitutional Court annulled a legal provision that allowed the Minister of Interior to suspend NGO representatives during AML/CFT investigations. This ruling also addressed a major criticism that had prevented Türkiye from being rated as compliant in the fourth round of the FATF's Mutual Evaluation process. No new legislation has been introduced to replace this provision.

### Judicial cooperation in criminal, civil and commercial matters



Judicial cooperation in civil and criminal matters needs to be improved to meet European standards. Türkiye still needs to accede to the Hague Convention of 30 June 2005 on Choice of Court Agreements and the 2019 Hague Convention on the Recognition and Enforcement of Foreign Judgments in Civil or Commercial Matters. Türkiye has not yet ratified the

European Convention on the Compensation of Victims of Violent Crimes. However, Türkiye has been participating in the negotiations on a new Council of Europe instrument that promises to strengthen judicial cooperation in matters of criminal asset recovery. The legal framework for judicial cooperation in civil and criminal matters is partially aligned with the EU *acquis*. In November 2024 a new circular on extradition was issued. A central monitoring system was developed to make the handling of cross-border legal matters more transparent and efficient to improve the management and tracking of incoming and outgoing requests. The users of the system were trained. The implementation of the 2024 circular, which set up international judicial cooperation liaison offices within seven prosecution offices across the country, continues. These offices aim to facilitate coordination and improve the processing of requests related to criminal matters, both domestically and internationally, including with Eurojust, and help alleviate the workload of the Central Authority. The functioning of these offices needs to be improved. Additionally, there is a need to strengthen the capacity of the Ministry of Justice, courts, and prosecution offices to efficiently process judicial cooperation requests in criminal matters. This



includes increasing the number of personnel dedicated to handling mutual legal assistance and extradition cases within the Central Authority. Between 1 March 2024 and 31 July 2025, Türkiye was involved in 10 Eurojust cases, mostly related to organised crime and fraud. An international agreement with the EU on cooperation with Eurojust is not in place. Cooperation with the European Public Prosecutor's Office (EPPO) has yet to be established,

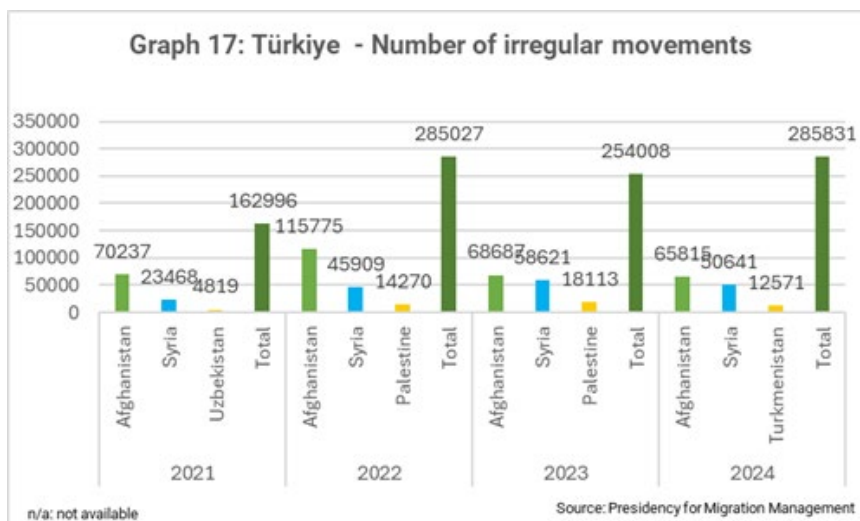
although in 2024, the EPPD sent eight requests for mutual legal assistance to the authorities of Türkiye.

### Legal and irregular migration

The management of legal and irregular migration needs to be improved. Cooperation on combating irregular migration is generally effective.

#### Legal alignment, strategic and institutional frameworks

The Presidency for Migration Management (PMM) is still the institution in charge of migration management. In the past year, the PMM continued to recruit auditors and migration experts for its headquarters and provincial administration as well as a limited number of social workers, psychologists, lawyers and interpreters. Nevertheless,



significant shortages in these profiles persist, particularly in removal centres and the provincial administration. To address the shortages, the PMM initiated recruitment of new cadre of 'administrative detention personnel' to be deployed in removal centres.

#### Implementation and enforcement capacity

The EU-Turkey Statement remained the main framework for cooperation on migration between the EU and Türkiye.

However, Türkiye's unilateral suspension of the return of irregular migrants from the Greek islands under the 'One-for-One' scheme of the Statement continued. As regards resettlement from Türkiye to the EU under the same scheme, the total number of Syrian refugees resettled from Türkiye was 44 046 by the end of August 2025.

Türkiye continued to not fully implement the EU-Turkey Readmission Agreement. It continued to maintain its position that it would not implement the rules on third-country nationals until the visa liberalisation process is completed.

According to the International Organization for Migration (IOM), 175 migrants lost their lives in the Eastern Mediterranean in 2024, compared with 171 in 2023. Between January and August 2025, 134 migrants lost their lives, and five are missing, compared with 89 in the same period in 2024.

In the first half of 2025, there were less than 15 000 arrivals from Türkiye to the EU, a decrease by more than one third compared to the same period last year. Arrivals from Türkiye decreased in all relevant MS (Bulgaria, Cyprus, Greece and Italy).

Starting in Istanbul in July 2023, the Ministry of Interior introduced 270 mobile migration points in 81 provinces of Türkiye as part of intensified efforts to detect and process foreigners residing illegally in Türkiye. The Minister of Interior announced that since July 2023, 145 435 irregular migrants had been detected by these units and subjected to



deportation processes. Overall, Turkish authorities apprehended 108 244 irregular migrants in 2025 (454,662 in 2019, 285,027 in 2022, 254,008 in 2023, 225,831 in 2024).

According to the Ministry of Interior, as of 18 September 2025, 7 528 migrant smugglers were apprehended in 2025 (7,942 in 2021, 9,235 in 2022 and 10,482 in 2023, 13,061 in 2024). 5 164 suspected migrant smugglers were arrested in 2024. Türkiye takes part in the Global Alliance against Migrant Smuggling, and is invited to renew its engagement at the occasion of the Global Alliance's second conference scheduled to take place at the end of 2025. Voluntary returns of irregular migrants financed through national as well as EU funds continued. In 2024, 3 444 irregular migrants were returned through the national voluntary return scheme, while 5 487 were returned with the assistance of the IOM and EU financing.

The number of removal centres stands at 32, with a total capacity of 18 780. The PMM also set up pre-reception and transfer centres in major provinces to process the cases of irregular migrants apprehended by law enforcement agencies, before their transfer to removal centres. In October 2024, European media reported on alleged human rights violations and misconduct in removal centres, citing issues such as overcrowding, poor hygiene, access to healthcare and legal aid as well as cases of ill-treatment. Cases of forced returns to Syria and Afghanistan, and pushbacks at the Türkiye-Iran border were also reported. The PMM issued a statement underlining its zero-tolerance approach to ill-treatment and rejected these allegations.

A limited number of irregular migrants in removal centres (1 594) benefited from free legal aid in 2024 (956 in 2023, 939 in 2022, 1 059 in 2021). In addition to the free legal aid scheme, 108 145 migrants were able to have access to and meet their lawyers in removal centres in the same period (24 148 in 2023).

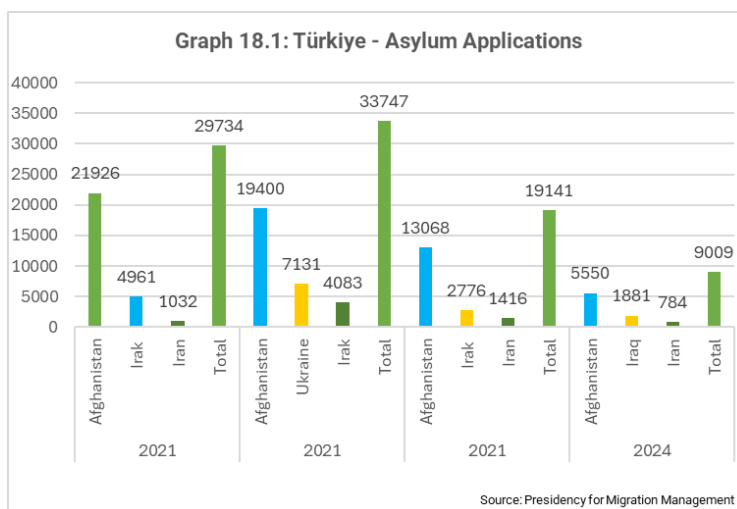
1 056 632 foreigners were legal residents in Türkiye in 2024 (1 107 032 in 2023, 1 345 488 in 2022, 1 275 741 in 2021). As of August 2025, there were 1 108 394 resident permit holders in Türkiye. Nationals of Turkmenistan, Azerbaijan and the Russian Federation were the most common holders of residence permits.

## Asylum

The legal framework on asylum is partially aligned with the EU *acquis*. The management of the asylum system needs to be improved.

### Legal alignment, strategic and institutional frameworks

The PMM is the main institution responsible for all asylum-related procedures. Decisions on status determination are subject to administrative and judicial appeal procedures.

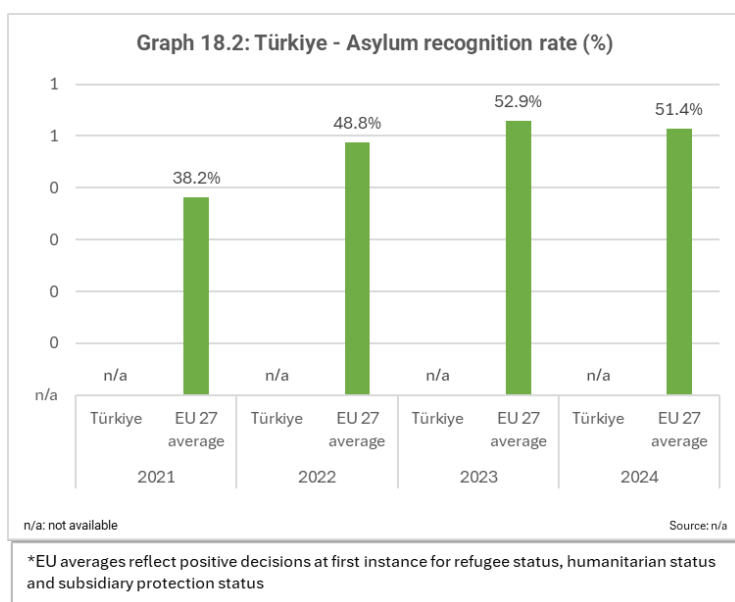


Legislation in this area is partially aligned with the EU *acquis*. The Law on foreigners and international protection maintains the reservation (geographical limitation) expressed in the New York Protocol to the 1951 Geneva Convention. As a result, the vast majority of people seeking international protection in Türkiye cannot apply for full refugee status but only for 'conditional refugee' status and subsidiary protection.

### Implementation and enforcement capacity

Türkiye continued to host one of the largest refugee populations in the world, with 2 508 446 Syrians with temporary protection status, and 52 437 Syrians with short-term residence status (August 2025). According to Turkish authorities, there are also over 172 602 non-Syrians (July 2025), whose number declined over the reporting period (259 000 in 2024).

The number of asylum applications dropped significantly. In 2024, Türkiye granted international protection (refugee status, conditional refugee status or subsidiary protection) to 1653 applicants, down from 11 094 in 2023. In 2024, Türkiye rejected 34 570 applications. In 2024, the cumulative total of pending international protection applications stood at 162 787 (224 065). There is no data on the number of rejected applications. The significant backlog was not reduced. There is still no publicly accessible data on international protection with a breakdown by category of decisions and pending cases at the end of the year.



There are still challenges in accessing registration and asylum procedures across the country. Concerns remained about the quality of decisions on asylum, their reasoned notification and challenges with the awareness of and access to legal aid for appeals.

Following the fall of the Assad regime in Syria in December 2024, the voluntary returns to Syria considerably increased. On 7 September 2025, Interior Minister Yerlikaya announced that 474 018 Syrian nationals had voluntarily returned to their country since 8

December 2024. Between January and July 2025, the Turkish authorities allowed “go-and-see visits”, that allowed Syrians to temporarily travel to Syria while keeping their temporary protection status). It is important that returns continue to be independently monitored by UNHCR to ensure compliance with international law and standards. The PMM and the EU Agency for Asylum continued their cooperation and prepared the 2024-2026 Cooperation Roadmap. The Roadmap provides capacity-building assistance on asylum-related legislation and procedures and an effective reception system in line with the Common European Asylum System and European standards.

### Visa policy

The national visa policy is not aligned with that of the EU, in particular the list of countries whose nationals require a visa to enter the EU.

Türkiye needs to further align its visa policy with the EU’s visa policy. This would include: (i) further aligning Turkish visa requirements with the EU lists of visa-free and visa-required countries; (ii) phasing out the issuing of visas at borders and electronic visas; and (iii) ensuring that the issuing of visas at its diplomatic missions is carried out in line with the conditions and procedures set out in the EU Visa Code. Türkiye continues to apply a discriminatory visa policy against nationals of Cyprus.

Türkiye made no progress in meeting the six unfulfilled benchmarks of the visa liberalisation roadmap<sup>6</sup>.

While Turkish nationals are still subject to visa requirement when travelling to the EU, the European Commission adopted on 15 July 2025 more favourable visa rules for Turkish citizens applying for Schengen visas (so called “cascade rule”)<sup>7</sup>, in order to further facilitate people-to-people contacts.

### **Schengen governance and external borders**

The legislative framework for the management of external borders needs to be improved.

#### Legal alignment, strategic and institutional frameworks

The PMM remains the main body responsible for border management. The PMM’s coordination role in border management alongside its existing responsibilities in migration management was further defined and institutionalised with the Presidential circular of January 2025. The circular designates the PMM as the central authority for coordinating migration-related activities across public institutions in Türkiye and bolsters integrated border management (IBM) by advancing inter-agency collaboration, boosting data-driven decision-making, and promoting a unified approach to border control and migration management.

The 6th meeting of the Border Management Implementation Board was held in December 2024. Its supervising body, the Integrated Border Management Coordination Board, has not yet met since its creation. Interinstitutional meetings on specific topics were held at technical levels.

The National Coordination and Joint Risk Analysis Centre (NACORAC) is still not fully operational. Staff secondments from all relevant institutions were completed. The legislative framework governing NACORAC’s mandate continues not to grant NACORAC sufficient authority over other institutions on data sharing and risk analysis. Efforts are under way to address the shortcomings of NACORAC’s existing legal framework, to upgrade its status, and to redefine its duties and authorities – including data collection, sharing, processing and joint risk analysis – under a broader national law instead of an implementing law. In the absence of comprehensive data-sharing protocols, NACORAC has started collecting data from central and local institutions at a basic level only. In 2024, a pilot risk analysis report and the first annual risk analysis report were prepared using open-source and hand-delivered data only. NACORAC continued to use test data to further analyse its software. In-house instant data transfer from the Ministry of Interior’s GÖC NET to NACORAC has only started and further capacity-building activities are ongoing. The risk analysis process remains limited, and negotiations on harmonising data patterns and efforts to sign protocols for improved data sharing with all relevant institutions are ongoing.

Türkiye still lacks a national IBM strategy and an updated action plan. These are the main policy documents that would make it possible to coordinate national and international efforts and initiatives in this area under a single framework. To bring the country’s border management system in line with the EU *acquis*, Türkiye should step up its efforts to improve

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<sup>6</sup> The six benchmarks relate to the anti-terror law, personal data protection legislation, implementation of the EU-Turkey Readmission Agreement, conclusion of an international agreement with the EU on Europol, implementation of the Group of States against Corruption (GRECO) recommendations on anti-corruption and judicial cooperation with all EU Member States.

<sup>7</sup> C(2025) 4694 final

interservice and international cooperation, by accelerating the adoption of an IBM strategy and updating its IBM national implementation action plan from 2006. It would also need to enact new legislation and set up a non-military border management body in charge of all aspects of border management, including border surveillance at the 'green' border, which is under the responsibility of the Turkish Land Forces.

#### Implementation and enforcement capacity

Türkiye continued to invest significant efforts and financial resources in modernising border security at the land border, especially in the south and south-east of the country, with 75% of modular concrete wall construction activities on the Iranian border having been completed. The EU provides substantial support to Türkiye for modernising its border surveillance infrastructure, particularly for the electro-optical communication and surveillance masts system.

Relations with the European Border and Coast Guard Agency (Frontex) are based on the memorandum of understanding of 2012. The memorandum should be renewed to reflect the revisions of the EBCG Regulation and in order to allow the EU and Türkiye to fully benefit from the Agency's expanded mandate. The authorities continued to provide monthly reports on irregular migration flows at the country's western land and sea borders. The PMM is now the national Frontex contact point. Focal points within the relevant authorities, i.e. the Turkish Coast Guard and the Turkish National Police (the Department of Combating Migrant Smuggling, and Border Gates), are ensuring cooperation and communication with Frontex and its Liaison Officer in Ankara. Several significant interactions took place between Frontex and Turkish authorities throughout 2024.

Cooperation with neighbouring Greece and Bulgaria through the trilateral Police and Customs Cooperation Centre at the Bulgarian-Turkish border crossing point Kapitan Andreevo / Kapıkule continued in the form of data sharing and regular and ad hoc meetings between the countries' respective authorities within the scope of existing agreements.

Türkiye continued to contribute to INTERPOL's databases, albeit only based on manual inquiries in case of need. INTERPOL's stolen and lost travel documents database is not integrated into Türkiye's local database and there is no access to other international police databases. Local database connections are used by authorised officers of the Turkish National Police in all 81 provinces.

## 2.3. ECONOMIC CRITERIA

<i>Table 19:</i> <b>Türkiye - Key economic figures</b>	<b>2016-21</b> average	<b>2022</b>	<b>2023</b>	<b>2024</b>
<b>GDP per capita</b> (% of EU-27 in PPS) <sup>1)</sup>	62.0	68.0	72.0	71.0
<b>Real GDP growth</b>	4.9	5.4	5.0	3.3
<b>Activity rate of the population aged 15+ (%)</b> , total	52.0	53.1	53.3	54.2
<i>female</i>	33.1	35.1	35.8	36.8
<i>male</i>	71.3	71.4	71.2	71.9
<b>Unemployment rate of the population aged 15+ (%)</b> , total	12.0	10.5	9.4	8.7
<i>female</i>	14.7	13.5	12.7	11.8
<i>male</i>	10.7	9.0	7.7	7.1
<b>Employment of the population aged 15+ (annual growth %)</b>	1.5	6.7	2.9	3.1
<b>Nominal wages (annual growth %)</b>	18.7	73.1	106.3	91.8
<b>Consumer price index (annual growth %)</b>	13.7	72.3	53.9	58.5
<b>Exchange rate against EUR</b>	6.3	17.4	25.7	35.5
<b>Current account balance (% of GDP)</b>	-1.9	-5.1	-3.7	-0.8
<b>Net foreign direct investment, FDI (% of GDP)</b>	0.9	1.0	0.4	0.4
<b>General government balance (% of GDP)</b>	-2.4	-1.1	-5.1	-4.8
<b>General government debt (% of GDP)</b>	32.5	30.2	28.7	24.0
<i>Notes :</i>				
1) Eurostat				
<i>Sources: Turkstat, Central Bank of Türkiye, Turkish Ministry of Treasury &amp; Finance and Eurostat</i>				

### 2.3.1. The existence of a functioning market economy

#### Economic governance

**Faced with the economic fallout of domestic political turmoil, the authorities further tightened their policy stance.** Domestic political tensions following the arrest of the mayor of Istanbul in March 2025 triggered financial turmoil and large capital outflows. The authorities took action to stem the fall of the lira, restore investor confidence, and preserve financial stability, although market interventions led to a sizeable decrease of official reserves. The central bank interrupted its rate-cutting cycle and raised its key policy rate in April, before resuming monetary easing in July. It also took macroprudential measures to strengthen the monetary transmission mechanism and manage liquidity. In support of disinflation efforts, the 2025 budget sets a much lower deficit target, mostly reflecting the winding down of earthquake reconstruction spending. However, the target was revised upwards in early September, softening consolidation efforts.

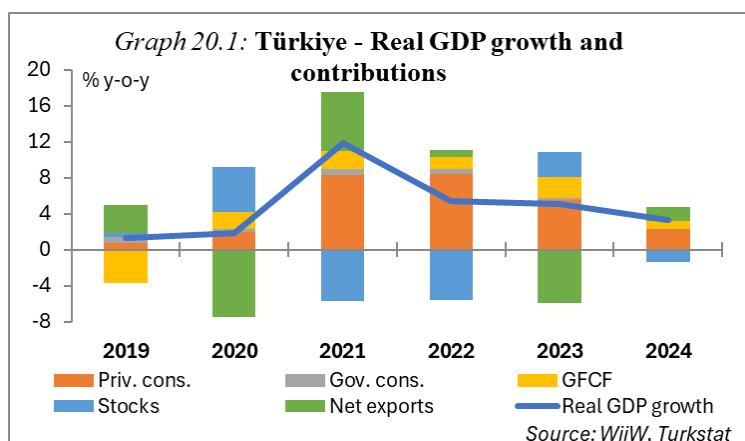
**The policy guidance set out in the conclusions of the Economic and Financial Dialogue of May 2024 was only partially implemented, yet the rate of implementation improved markedly from previous years.** In line with the recommendations, the authorities maintained an overall tight macroeconomic policy mix and reduced the budget deficit significantly beyond initial plans, while reconfirming their commitment to sound fiscal policy over the medium-term. They also reduced fiscal risks by rapidly winding down the stock of foreign exchange (FX) guaranteed deposits and terminated the opening and renewal of such accounts in August. Tax exemptions were curtailed only marginally and the government

continued to subsidise fossil fuels.

### Macroeconomic stability

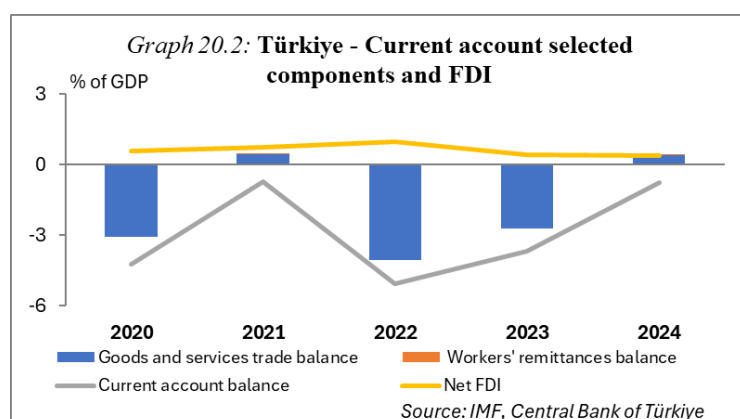
#### Economic growth moderated amid weakening domestic demand.

Real gross domestic product (GDP) increased by 3.3% in 2024, compared with 5.0% in 2023 and the 5-year average of 5.1% (2019-2023). Household consumption and investment growth decelerated strongly, while net exports contributed positively to real GDP growth, largely due to a fall in imports. Economic activity contracted in industry and



weakened in services but remained robust in agriculture and construction. Tight economic policies curtailed domestic demand and growth decelerated further to 2.3% year-on-year in the first quarter of 2025. However, domestic demand rebounded somewhat in the second quarter on stronger household consumption, investment and rising stocks, driving economic growth up to 4.8%. Türkiye's per capita GDP in purchasing power standards slightly declined to 71% of the EU average in 2024, down from its peak of 72% in 2023.

#### Türkiye's external position strengthened, yet vulnerabilities remain.



External imbalances declined faster than expected and the current account deficit fell to 0.8% of GDP in 2024 and to 1.3% of GDP in the first half of 2025, down from 3.7% in 2023. Higher capital inflows helped rebuild official FX reserves, which reached record-high levels in early 2025 before falling in early spring amid domestic financial turbulences. However, already by end-July 2025, the central bank reserves had largely recovered.

Foreign direct investment (FDI) inflows were subdued at below 1% of GDP in 2024, pointing to Türkiye's untapped potential to attract FDI. The country risk premium declined, the lira strengthened in real terms, and external debt declined to around 38% of GDP in 2024. The improved external position was also instrumental in the upgrades of Türkiye's sovereign credit rating last year. However, the domestic political tensions in the spring weakened the lira, increased the country risk premium, and triggered large capital outflows. Türkiye's 5-year credit default swap spread increased from around 250 basis points in mid-March to 375 basis points in mid-April. However, in September it fell below 250 basis points, a five-year low.

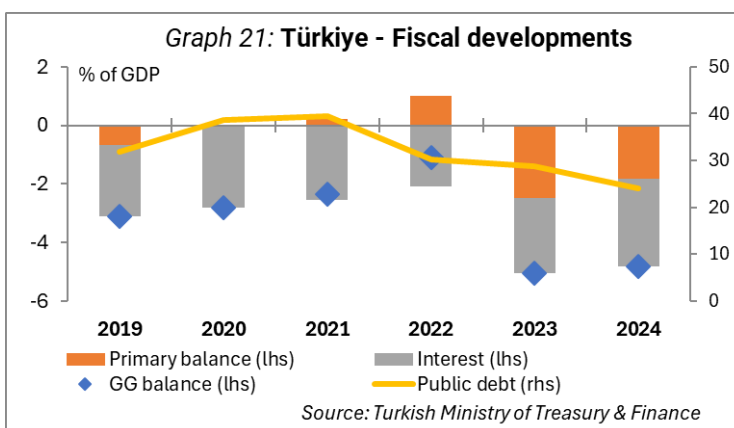
#### The central bank remained hawkish, fighting both elevated inflation and domestic financial turmoil.

The central bank kept its policy rate at 50% for most of 2024. It started its rate-cutting cycle in December (250 basis points), followed by two cuts (250 basis points each) in January and March 2025. The authorities also tightened the caps on the growth of certain credit categories to help curb domestic demand and support disinflation. To stem market

turmoil and reduce exchange rate volatility triggered by the arrest of the mayor of Istanbul in March, the central bank increased its overnight lending rate by 200 basis points to 46% and took macroprudential measures to strengthen the monetary transmission mechanism, support the tight monetary stance, and manage lira and FX liquidity. In April, the bank tightened its policy further by increasing its 1-week repo auction rate (the key policy rate) to 46%, its overnight lending rate from 46% to 49%, and the overnight borrowing rate from 41% to 44.5%. The monetary policy stance has remained tight even after the central bank resumed its easing cycle in July, with the key policy rate at 40.5% in September. This stance was instrumental in bringing down inflation and inflation expectations, and in markedly improving the FX position of the central bank. However, annual inflation remained elevated at 33.0% in August. Inflation expectations of market participants (12-month ahead) fell to 22.8%, but expectations of the real sector (37.7%) and households (54.1%) remained very high.

**Fiscal consolidation advanced due to the winding-down of earthquake reconstruction spending.**

The 2024 accrual-based government deficit was 4.8% of GDP, broadly in line with the revised target but markedly below the initial budget plan. While the deficit also decreased in comparison to the previous year, due to lower earthquake-related spending, net of it the underlying budget deficit increased in 2024. The 2025 central government budget



targets a sizeable reduction of the budget deficit to 3.1% of GDP, supporting the fight against inflation, again largely driven by lower earthquake reconstruction expenditure. However, this target was revised upwards to 3.6% of GDP with the new medium-term economic programme (2025-2028) adopted in September, leaving the underlying budget deficit broadly unchanged in 2025. In 2024, the government debt ratio declined to 24.0% of GDP, helped by the strong denominator effect from the very high inflation.

**The authorities remained committed to lowering inflation, relying mostly on a tight monetary policy stance.** A response to the financial turmoil that occurred in the spring of 2025, monetary policy was tightened further. The key policy rate was increased significantly above current and expected inflation, while macroprudential measures additionally tightened financing conditions. However, fiscal consolidation plans were relaxed with the medium-term programme update in September.

Functioning of product markets

*Business environment*

**The authorities took some limited steps to improve the business environment.** Insufficient transparency and predictability, along with a large informal economy, remain concerns. In January 2025, Türkiye adopted a judicial reform package, which includes measures to increase the efficiency of the judiciary and strengthen the role of specialised courts. The results of the action plan to improve the business environment adopted in 2024 were not disclosed in the reporting period. A new action plan for 2025 was adopted in July 2025 consisting of 39 actions, including measures on data protection, improving the functioning of judiciary mainly through alternative dispute settlement, alignment with international

standards on public procurement, and actions on green and digital transition, largely mirroring the measures of the 12th Development Plan. Türkiye still lacks a mechanism for systematically consulting business organisations and social partners when preparing new legislation. Even though alternative dispute resolution mechanisms have been promoted, commercial judicial processes are slow, and a large backlog of commercial court cases remains. Market exit remains costly and time-consuming due to complicated insolvency procedures. Nevertheless, due to the deteriorating economic conditions, the number of liquidated companies increased by 12.1% and the number of closed companies went up by 21.4% compared with 2023. The number of newly set up businesses dropped by 10.2% in 2024. Meanwhile, the acquisition and management of companies under the trusteeship of the Savings Deposit Insurance Fund is still conducted in a non-transparent manner. In June 2025, the trusteeship of the Fund was still managing 654 companies based in 42 provinces across Türkiye, with a total asset value of TRY 328 billion (EUR 8.3 billion) and 23 838 employees. Problems in enforcing intellectual property rights persist (see *Chapter 7 – Intellectual property law*). The government continued to implement its action plan to fight against the informal economy (2023-2025), yet the lack of performance indicators hinders the monitoring and transparency of the implementation progress. The informal sector's share in the economy remains structurally high and well above the OECD and EU averages.

#### *State influence on product markets*

##### **Price-setting interventions persist, and State aid transparency and control remains weak.**

The authorities introduced various import tariff quotas (e.g. for corn) and export restrictions (e.g. for eggs and oil). As part of the efforts to support households, residential properties consuming less than 417 kWh per month are receiving a subsidy as of 1 April 2025. Furthermore, the government covers 65% of the cost related to natural gas consumption of these properties. Regulatory authorities continued to carry out extensive price audits to investigate allegations of unfair pricing and stockpiling. The State aid law cannot be enforced due to the lack of implementing legislation and an operational institutional framework. In May 2025, Türkiye adopted a new State aid incentive scheme focusing on strategic sectors, the green transformation, and regional development. Türkiye did not formally establish a comprehensive State aid inventory or implement an action plan to align all State aid schemes with the EU *acquis* (see *Chapter 8 – Competition policy*).

#### *Privatisation and restructuring*

**The scope of privatisation remains limited.** This is partly because Türkiye has already privatised many of its state-owned enterprises. The Turkish Wealth Fund (TWF) has a portfolio of assets consisting of 31 companies from the financial (including state-owned banks, Borsa Istanbul and consolidated public insurance companies), telecommunications, petrochemicals, real estate, mining and iron/steel, agriculture and transport/logistics sectors. At the end of 2024, the TWF completed its first Sukuk issuance and signed an Islamic financing agreement worth USD 150 million with Dubai Islamic Bank, indicating Türkiye's growing participation in Islamic finance markets. The TWF's total assets increased to TRY 9.4 trillion in terms of value in 2023, up from TRY 5.6 trillion in 2022, yet its share in GDP declined from 37.3% to 35.2%.

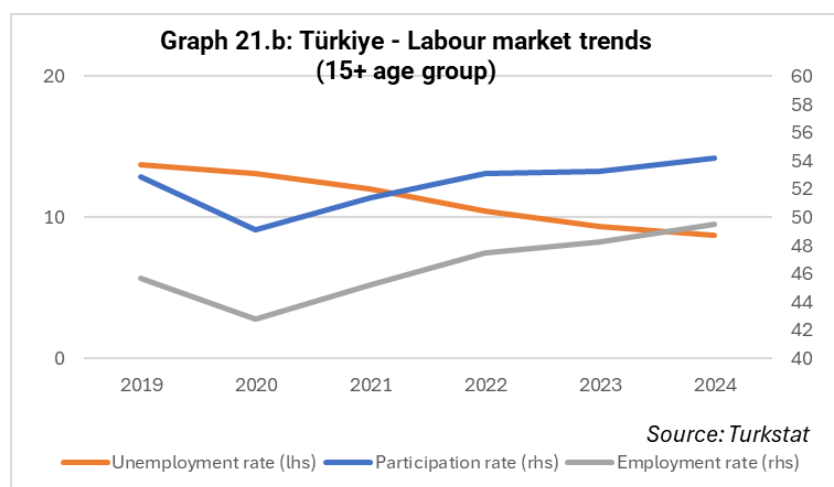
#### Functioning of the financial market

**The banking sector remained stable.** The pace of decline of bank loans –slowed down, and by April, real lending started growing again. Lending activity was relatively weaker in the corporate and housing loan segments. The authorities took steps to gradually simplify the complex regulatory environment. They terminated the securities maintenance regulation and took further steps to wind down other disruptive macroprudential measures in 2024.



However, in July 2025 the central bank introduced a new macroprudential package to support the lira. The share of FX -protected lira deposits declined rapidly from more than a quarter of the total deposit stock at their peak in 2023 to less than 2% in September 2025, removing a key source of financial sector vulnerability, the central bank terminated the opening and renewal of such accounts in August. Commercial banks' capitalisation, still favourably affected by forbearance measures, increased to 19.7% in 2024 (19.1% in 2023). Both profitability and capitalisation remained lower in state-owned banks. The non-performing loan ratio was 2.2% in July 2025 (1.7% in state banks) – increasing slowly since early 2024. In 2024, the central bank recorded a significant loss for a second year in a row. High inflation and subdued lending activity caused banking system assets to decline from 87% of GDP in 2023 to 73% in 2024. The share of foreign-owned banks in total banking sector assets declined slightly to 24.4%.

### Functioning of the labour market



**Labour market indicators improved further, but structural challenges remain.** Türkiye's labour market remained robust. The participation rate (15+ age group) increased from 53.3% on average in 2023 to 54.2% in 2024, and remained elevated at 54.3% in July 2025. The employment rate also increased from to 48.3% on average in 2023 to

49.5% in 2024, and 49.8% in July 2025. The unemployment rate fell further, reaching 8.3% in July. The gap between the male and female employment rate is still very large (66.9% for men against 32.5% for women in 2024), and the unemployment rate for women stood at 11.8% in 2024. Women's participation in the labour force is still restricted by barriers in certain occupations, traditional gender roles and gender gaps in education, limited quality and affordable childcare facilities (largely inaccessible in the countryside), and insufficient skills. To tackle this restriction, the expansion of affordable care services and adoption of more effective active labour market programmes is pertinent. The composite measure of labour underutilisation increased from 22.8% in 2023 to 26.7% in 2024 (from 30.6% to 35.3% for women), and further to 31.6% (40.1% for women; highest on record) in the second quarter of 2025, as time -related underemployment increased. Young people still have difficulties entering the labour market. The youth unemployment rate (15-24) declined from 17.4% in 2023 to 16.3% in 2024, before increasing again to 17.3% in July 2025. The share of young people not in employment, education or training remained unchanged at 22.1% in the second quarter of 2025. Regional labour market disparities continued to decline, with unemployment rates across different provinces ranging from 4.0% to 18.3% in 2024. With a view to lowering inflationary pressures, the gross minimum wage was raised only once in 2024, and again by 30% (below the inflation rate) at the beginning of 2025.

### 2.3.2. The capacity to cope with competitive pressure and market forces within the Union

#### Education and innovation

**While efforts to improve human capital continue, skills mismatches remain a significant challenge.** Expenditure on education was 4.3% of GDP in 2023, up from 3.9% in 2022. Government spending was 3.6% of GDP in 2023, increasing by 0.5 percentage points from 2022. In the 2023/2024 school year, net enrolment rates increased at the primary level and slightly at the lower secondary level, while declining marginally for preschool and significantly for upper-secondary and higher education (see *Chapter 26 – Education and culture*). Addressing skills mismatches remains a key challenge in making the economy more competitive. In the 2022 Programme for International Student Assessment (PISA) survey carried out by the OECD, students in Türkiye performed below the OECD average in mathematics, reading and science. Türkiye also continues to score poorly in educational attainment in the Global Gender Gap Index calculated by the World Economic Forum, ranking only 127th out of 146 countries in 2024. While the share of students in vocational and technical secondary education increased by 4 percentage points to 30.1% in 2024, further measures are needed to improve the quality of and access to vocational education and training (VET).

**Innovation outcomes improved, but are still lagging behind the EU average.** After dropping to 1.3% of GDP in 2022, the research and development (R&D) expenditure ratio rose marginally to 1.4% in 2023. However, the gap from the EU average of 2.2% remains significant. The private sector is the primary driver of R&D, accounting for 65.1% of R&D expenditure in 2023, reflecting an increase of 3.7 percentage points from 2022. In March 2025, Türkiye announced its Industry and Technology Strategy for 2030, which aims to increase the share of R&D expenditure to 2.2% of GDP by 2030. In the Global Innovation Index 2024, Türkiye ranked 37th out of 133 countries, a significant improvement over the last decade. However, the performance of the innovation system lags behind that of its European peers, with Türkiye being an emerging innovator, with its performance at 51.7% of the EU average in 2024. In 2024, the total number of granted patents increased by 15.9% in comparison with 2023, and was close to its 5-year average. The number of domestic patents granted in Türkiye increased by 33.7% and the number of international patents increased by 9.8% in 2024 in comparison with 2023.

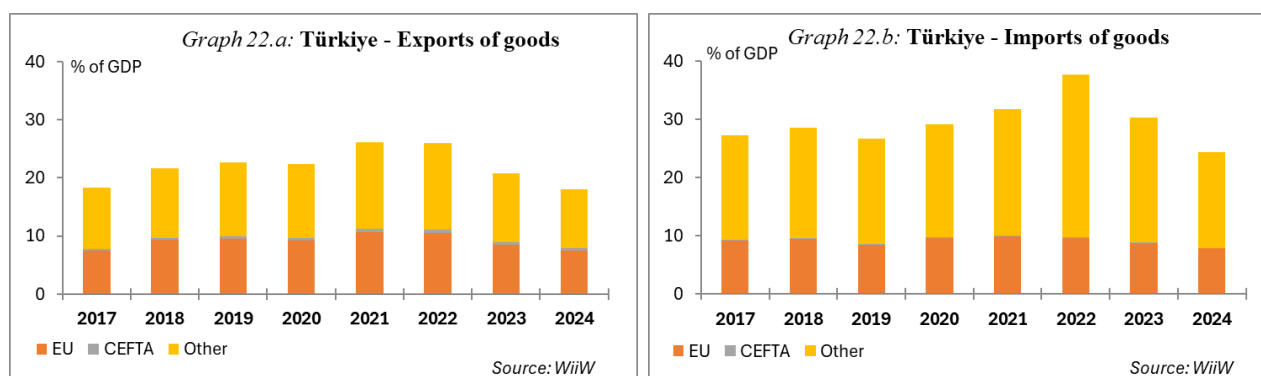
#### Physical capital and quality of infrastructure

**Investment activity decelerated slightly amid tight financial conditions.** Total gross capital formation accounted for 31% of GDP in 2024, down by 0.9 percentage points from 2023. The decline was particularly pronounced for machinery and equipment investment, while the share of construction in total investment increased to 45.2% in 2024, mostly due to reconstruction efforts in the aftermath of the February 2023 earthquakes and urban transformation plans. Türkiye retains its ambition of becoming a regional energy hub, investing heavily in expanding its liquified natural gas import and regasification capacity as well as natural gas storage capacity. The share of renewable energy continued to increase, reaching 60% of the installed power in operation in April 2025 and 45% of energy generation in 2024. Türkiye continues its efforts to accelerate the digitalisation process by extending the scope of e-government services, regulating and monitoring e-commerce markets, and supporting the digitalisation of small to medium-sized enterprises (SMEs). Türkiye ranks 10th out of 35 countries (EU, European Free Trade Association, and enlargement countries) in the latest e-government benchmark report (2022-2023), with an overall score of 83% in e-government maturity, which is above the EU average (76%). Digitalisation efforts in businesses continued, with 96% of companies having internet access in 2024, while the proportion of individuals using the internet for buying or ordering goods or services for private use increased from 49.5 % in 2023 to 51.7% in 2024.

#### Sectoral and enterprise structure

**The economy is diversified, with a well-developed service sector and strong manufacturing base.** The share of services in GDP increased to 57.5% in 2024, up 3.2 percentage points from 2023. The industry's share declined from 22.8% in 2023 to 19.7% in 2024. Driven mostly by earthquake reconstruction efforts, the construction sector's share in GDP rose from 5.4% in 2023 to 5.8% in 2024, but it remained significantly below its pre-2019 levels. Facing productivity challenges, the agriculture sector's share fell further to 5.8% of GDP in 2024. SMEs are the backbone of the economy, accounting for 70.5% of employment in 2023 and 40.1% of the total value added in 2023, increasing by around 4 percentage points compared with 2022. Approximately 55.6% of SMEs in the manufacturing sector operated in low technology sectors in 2023. Türkiye continued to implement various economic support schemes that target SMEs, yet access to and the cost of long-term finance remain a problem.

### Economic integration with the EU and price competitiveness



**Economic integration with the EU is high.** Türkiye is the EU's fifth largest trading partner, representing 4.2% of the EU's total trade in goods with non-EU countries in 2024, compared with 4.1% in 2023, while the EU is Türkiye's largest trading partner. The EU's share of Turkish goods exports increased to 41.4% in 2024, up from 40.8% in 2023. The share of Turkish goods imports originating from the EU increased from 29.3% in 2023 to 32.1% in 2024, but it is still below its long-term average. Russia's share in Turkish merchandise exports fell to 3.3% in 2024, down from a historic high of 4.3% in 2023. The nominal value of imports of goods from Russia declined in 2024, largely influenced by lower international energy prices, but Russia's share remained significant at 12.8% of total goods imports.

The EU's share of FDI inflows into Türkiye was 55% in 2024. Trade openness significantly declined to 55% in 2024 mainly due to lower deflators of both exports and imports of goods and services. Türkiye took steps to address some of the trade barriers with the EU, reducing their number from 26 in early 2021 to 14 in early 2025.

## **2.4. PUBLIC PROCUREMENT, STATISTICS, FINANCIAL CONTROL**

### **Chapter 5: Public procurement**

*EU rules ensure that the public procurement of goods and services in any Member State is transparent and open to all EU companies on the basis of non-discrimination and equal treatment.*

#### Institutional set-up and legal alignment

The **legal framework** on public procurement remains only partially aligned with the EU *acquis*. Concerns remain over the legislation containing discriminatory practices, including

compulsory use of domestic price advantage and offsets, that allow authorities to demand compensatory measures if goods are not produced domestically. Major infrastructure projects using public-private partnerships are frequently excluded from public procurement rules. The number of exclusions that are not in line with the EU *acquis* continued to increase in 2024, narrowing the scope of public procurement rules. The legislation also allows Türkiye to further expand the scope of exclusions by requiring public institutions and organisations to procure specific goods and services from the State Supply Office. Sector-specific laws continue to restrict transparency.

A coherent framework for coordinating, supervising and monitoring public-private partnership operations is still lacking.

Türkiye's Medium-Term Economic Programme (2025-2027) and Development Plan (2024-2028) use public procurement to promote domestic production and technology transfer, and reduce the foreign trade deficit by favouring domestic products.

The institutional framework still needs further strengthening to ensure the operational independence of the Public Procurement Board (PPB) within the Public Procurement Authority (PPA) is secured. It remains potentially impaired since the President is authorised to directly appoint the chair and members without specific regard to candidates' education or sector experience.

#### Implementation and enforcement capacity

In 2024, despite the increase of Türkiye's **public procurement market** in value, its size as a share of GDP slightly declined to 5.6%, down from 6.1% in 2023. The PPA has expanded the scope of its public procurement platform (EKAP), effective from August 2025, to enable the electronic execution of tenders, direct procurement, and related contracts. However, in 2024 Türkiye continued an excessive use of negotiated procedure, which corresponded to 31.26% and 43.79% (compared with 30.13% and 43.27% in 2023) of the total tenders, respectively, in terms of value and number. When tenders with limited competition are excluded (i.e., restricted tenders, negotiated tenders, derogations and direct awards) only 39.7% of the public procurement market (in value) is open to fair competition. Also, the implementation of the domestic price advantage in international tenders increased to 54.39% and 41.62% (up from 48.68% and 40.35% in 2023) in value and number respectively. The extensive use of these practices leads to allegations of political influence over public tenders. A risk indicator system is also required to detect potential integrity issues in the procurement process.

Regarding the **capacity to manage public procurement processes**, the PPA remains stable with 322 staff. The level of monitoring of contract awards and implementation remains satisfactory. The PPA publishes statistics every six months for measuring the performance, while it held trainings to contracting authorities, with 6 359 participants (compared with 5 287 in 2023).

Mechanisms remain in place to identify and **prevent corruption** and fraudulent practices in public procurement, including rules on integrity and conflict of interest.

#### Efficient remedy system

The **right to a legal remedy** is provided by the Constitution, and the PPL established an institutional framework and a system for handling complaints. However, the mechanism needs to be further aligned with the EU remedies directives. The appointment policy and the PPB's position as part of the PPA is a source of concern. Establishing a completely independent procurement review board that is distinct from the PPA and guaranteeing the independence of board members remains a pending priority. The PPB received 1 924 complaints (2.96% of contracts) in 2024, compared with 1 626 (2.2%) in 2023.

## Chapter 18: Statistics

*European statistics are developed, produced and disseminated by EU Member States, guided by the principles and quality criteria elaborated in the Regulation on European statistics, such as professional independence, impartiality, reliability, accessibility and statistical confidentiality. Common rules are provided for the methodology, production and dissemination of statistical information, which are further specified in sectoral legislation that constitute the EU acquis on statistics.*

On **statistical infrastructure**, Türkiye's statistics legislation is based on European standards and the principles of the European Statistics Code of Practice. The number of members and representative institutions in the Statistical Council were increased through a legislative amendment. Concerns persist over the credibility of TurkStat and the declining public trust in key macroeconomic statistics. The institution still lacks transparent appointment and dismissal procedures, including professional criteria for the appointment of TurkStat's President. Türkiye further improved the use of public institutions' administrative records and continued strengthening cooperation between TurkStat and other data providers. However, there is a significant number of data which are flagged as non-publishable.

As regards **classifications and registers**, registers in the statistical office are updated regularly. The main classifications are aligned with the EU *acquis*.

On **macroeconomic statistics**, Türkiye improved the level of compliance of its national accounts in terms of timeliness and provision of data, but further efforts are needed to close the remaining gaps in data reporting. Türkiye transmitted non-financial sector accounts data for 2009-2023. TurkStat provided regional accounts for 2024, but there is still room for improvement in terms of coverage of indicators. Concerning the Gross National Income (GNI), Türkiye has made efforts to fully align its GNI calculations with the European system of accounts 2010, yet some methodological improvements are still needed, such as for imputed rents and completeness of exhaustiveness. The GNI inventory is generally not fully aligned with the Eurostat's GNI Inventory Guide, and the transmission of national accounts data does not always occur in a timely manner. Türkiye continued to improve the quality and timeliness of the transmission of excessive deficit procedure (EDP) data, but additional efforts are required to address methodological issues, while ensuring the completeness of the transmission of EDP notifications and government finance statistics. In 2024, Türkiye transmitted quarterly general government debt data for the first time, but did not send the supply, use, and input-output tables. Türkiye produces good quality statistics in international trade in goods. It has sent international trade in services statistics for the years 2022 and 2023, but needs to improve the timeliness and the completeness of the dataset. Türkiye does not provide monthly balance of payments, and data gaps remain in the areas of international investment positions and foreign direct investment statistics. TurkStat started providing harmonised indices of consumer prices administered prices in 2025.

As regards **business statistics**, TurkStat has progressed in aligning with the new requirements in short-term business statistics, particularly in terms of data quality and completeness. Eurostat received the monthly index of production in construction from January 2017. R&D statistics, as well as railway, maritime and regional transport statistics have a high level of compliance. The annual surveys on the use of information and communication technologies are largely compliant with the EU *acquis*.

**Social statistics** are highly compliant with the EU *acquis*. TurkStat continued transmitting labour force survey quarterly data. It has improved the regularity and timeliness of data transmission on monthly unemployment, but there is still room to improve. Türkiye transmits

part of demographic and international migration statistics, but it does not collect statistics on asylum and managed migration in line with the EU *acquis*.

On **agricultural statistics**, the implementation of the agricultural census is ongoing. As a result of the census, the integrated farm statistics should now be completed. Statistics for most of the crops and animal production are available and sent to Eurostat. Cereals and oil seed crop balances are also transmitted to Eurostat. The economic accounts for agriculture are still not fully in line with the EU *acquis*.

Monthly and annual **energy statistics** and data on energy prices are sent regularly. Türkiye produces most of the **environmental statistics**. Further progress is still needed on waste generation statistics.

### Chapter 32: Financial control

*The EU promotes the reform of national governance systems to improve managerial accountability, sound financial management of income and expenditure, and external audit of public funds. The financial control rules further protect the EU's financial interests against fraud in the management of EU funds and the euro against counterfeiting.*

#### Public internal financial control

The **strategic framework** is partially in place. Türkiye currently lacks a coherent strategic framework for public administration reform and public finance management. Similarly, the public internal financial control policy paper has not been updated since 2013. Inconsistencies in the different planning documents and strategies, as well as a lack of coordination on regular monitoring and reporting, undermine the credibility of both the public finance management framework and strategies outlined in the policy documents.

Türkiye has a uniform administrative management structure that incorporates aspects of **managerial accountability** and delegation with a results-oriented performance management system. All public institutions are governed by the public financial management and control law (PFMC), which also outlines the components of financial control. Further efforts are required to harmonise legislation, managerial accountability, including reporting structures, decision-making delegation and internal control operations.

**Internal control** is governed by the PFMC and is largely compliant with international standards. However, capacity and ownership problems continue to undermine the implementation of internal control systems. Further improvement is needed in risk management practice, as well as monitoring and reporting of irregularities. Concerns on the listing of local administrations and state-owned enterprises in Türkiye's treasury single account remain.

The PFMC regulates **internal audit** practices in line with international standards. However, the purpose, authority and responsibility of internal audit remain undermined by the lack of a legal requirement to have internal audit units in ministries. Furthermore, the status of internal audit unit heads must be legalised; the number of internal auditors needs to be increased; and related manuals are required to be updated. There is no systematic follow-up procedure to ensure that agreed internal audit recommendations are implemented. The lack of clarity in the legislation and in practice between the internal audit and inspection organisations jeopardises the internal audit function's effectiveness.

The Internal Audit Coordination Board is the central harmonisation unit for internal audit, whereas the Directorate-General for Public Financial Management and Transformation of the Ministry of Treasury and Finance is the central harmonisation unit for financial management and control. Further action is needed to ensure its independence and improve

its capacity, organisational structure and resources to fulfil its mandate.

#### External audit

The **constitutional and legal framework** provide for the independence of the Turkish Court of Accounts (TCA). Concerns regarding the fiscal discipline, transparency and accountability of the Türkiye Wealth Fund (TWF), which is chaired by the President of the Republic and not fully subject to direct audit by the TCA, remain. The TWF is audited by an independent audit firm and State Supervisory Council appointed by the President. However, TCA is not allowed to audit all companies in the TWF portfolio. The audit reports on the TWF operations are not publicly available. The Disaster Reconstruction Fund, created in 2023 to manage the funds allocated to disaster recovery work, which is exempt from the general budget and the TCA audit scope, is not yet operational.

The Turkish **Court of Accounts** law complies with International Organisation of Supreme Audit Institutions standards. It establishes an almost exhaustive audit mandate and allows the TCA full discretion in performing its responsibilities. The TCA submits four audit reports a year to Parliament in addition to a statement of general conformity. However, the TCA reports are only evaluated by Parliament during its budget deliberations.

On the **impact of audit work**, TCA reports, excluding those on state-owned economic enterprises, are released online on an annual basis. More parliamentary oversight of TCA audit findings, recommendations and the performance of public institutions is needed. There is no efficient follow-up procedure to ensure that the agreed recommendations are implemented in a systematic and timely manner by the audited institutions. The discussion of budget and audit issues needs to be separated.

#### Protection of the EU's financial interests

While Türkiye's legislation still needs to be fully compliant with the EU Directive on the fight against fraud to the EU's financial interests by means of criminal law, the country maintains a good level of alignment with the EU *acquis*. The State Supervisory Council has been designated as the **anti-fraud coordination service** in 2019. There is no national anti-fraud strategy. In the previous year Türkiye reported 203 cases to the Commission via the online Irregularity Management System. Türkiye cooperates well with the **European Anti-Fraud Office** and should continue building up the track record of cooperation on investigations as well as on reporting of irregularities.

#### Protection of the euro against counterfeiting

Türkiye has reached a high level of alignment with the EU *acquis* in this area. Technical analysis of counterfeit currency, including euro banknotes, are conducted by a specialised department of the central bank. Furthermore, the Turkish State Mint carries out technical analyses of counterfeit coins, including euro coins. Financial penalties are imposed on financial institutions that fail to withdraw counterfeits from circulation.

### **3. GOOD NEIGHBOURLY RELATIONS AND REGIONAL COOPERATION**

#### **Cyprus**

Türkiye continued to refuse to recognise and cooperate with the Republic of Cyprus. Despite repeated calls by the European Council and the Commission, Türkiye has yet to fulfil its obligations as outlined in the Declaration of the European Community and its Member States of 21 September 2005 and in Council Conclusions, including those of December 2006 and December 2015. Türkiye did not fulfil its obligation to ensure the full and non-

discriminatory implementation of the Additional Protocol to the Association Agreement and did not remove all obstacles to the free movement of goods, including restrictions on direct transport links with the Republic of Cyprus. Türkiye also refused to cooperate with the Republic of Cyprus on security-related issues, including terrorism. Türkiye continued to veto applications by the Republic of Cyprus to join several international organisations, including the Organisation for Economic Co-operation and Development (OECD).

In the reporting period, Türkiye did not carry out any unauthorised drilling activities in the Eastern Mediterranean. The EU remains committed to defending its interests and those of its Member States as well as to upholding regional stability. In November 2024, following the fifth annual review of the framework for restrictive measures in response to Türkiye's unauthorised drilling activities in the Eastern Mediterranean, the European Council extended its restrictive measures for a further year, until 30 November 2025. Currently, one individual is subject to sanctions.

Türkiye's military exercises in the maritime zones of Cyprus continued. The flights of Turkish unmanned aerial vehicles in the flight information region and national airspace of the Republic of Cyprus also continued unabated. Türkiye continued upgrading its military drone base in Lefkoniko and naval base in Bogazi. Harassment of Cypriot fishing vessels and IUU fishing activities by Türkiye continued to be reported.

Türkiye again criticised the decision of the UN Security Council (UNSC) to renew the mandate of the UN Peacekeeping Force in Cyprus (UNFICYP) without the consent of the Turkish Cypriot community, and accused UNFICYP of bias. UNFICYP's mandated authority extends throughout the island of Cyprus, and restrictions on its freedom of movement can pose serious risks to the safety and security of UN personnel serving in peacekeeping operations.

Despite international condemnations, and the inadmissibility of the settlement of any parts of Varosha by people other than its inhabitants as provided for in UNSC Resolution 550 (1984), Türkiye did not reverse its actions to open the entire fenced-off area of Varosha, thereby further entrenching the *fait accompli* on the ground. The restrictions imposed in 2022 on the activities of UNFICYP within the fenced-off area of Varosha remained in effect – challenging UNFICYP's ability to execute its tasks in accordance with its mandate, and violating UNSC Resolution 789 (1992). On 19 July 2025, five Greek Cypriots were arrested, detained and prosecuted while visiting their property in the non-government controlled areas.

In November 2024, the Turkish and Cypriot Presidents briefly met in the margins of the European Political Community Summit in Budapest. The Turkish Foreign Minister also participated in the informal gatherings on Cyprus in Geneva and New York. These meetings were hosted by the UN Secretary-General (UNSG) in the broader format including the two Cypriot leaders and senior representatives of the Guarantor Powers (Greece, Türkiye, and the UK). They followed the informal meeting convened by UNSG with the two Cypriot leaders in New York in October 2024. In Geneva, the participants agreed, among other things, to the reappointment of a Personal Envoy by the UNSG. During these meetings, the Turkish Foreign Minister expressed a commitment to sustaining dialogue on the way forward and to pursuing initiatives that aim to build trust. A tripartite meeting on the Cyprus issue also took place in New York in September 2025, with the participation of the UNSG and the leaders of the Greek Cypriot and Turkish Cypriot communities.

Türkiye continued to advocate for a 'two-state solution' in Cyprus, contrary to relevant UNSC Resolutions, stating that any process seeking a bi-zonal, bi-communal federation would not be successful. The internationally not recognised 'Turkish Republic of Northern Cyprus' has



been participating as an observer in the Organization of Turkic States since 2022. The EU recognises only the Republic of Cyprus as a subject of international law in accordance with the relevant UNSC Resolutions and has stressed that any action to facilitate or assist in any way the international recognition of the Turkish Cypriot secessionist entity severely damages efforts to pave the way for formal settlement talks under the auspices of the UN.

The EU remains fully committed to a comprehensive settlement of the Cyprus issue within the UN framework, in accordance with all relevant UNSC Resolutions and in line with the principles on which the EU is founded and its *acquis*. The EU has expressed, most recently in the European Council Conclusions of December 2024, its readiness to play an active role in supporting all stages of the UN-led process, with all the appropriate means at its disposal. The EU attaches particular importance to the resumption of and progress in the Cyprus settlement talks in further strengthening EU-Türkiye cooperation. In December 2024, the EU welcomed the steps taken by the UNSG for a resumption of settlement talks, and in May 2025, it welcomed the reappointment of the UNSG's Personal Envoy on Cyprus. In May 2025, the European Commission appointed a Special Envoy for Cyprus.

As emphasised in the Negotiating Framework and Council declarations, Türkiye is expected to actively support the negotiations on a fair, comprehensive and viable settlement of the Cyprus issue within the UN framework, in accordance with the relevant UNSC Resolutions and in line with the principles on which the EU is founded and the EU *acquis*. It is important that Türkiye reaffirms its commitment to the UN-led settlement talks on Cyprus in line with the relevant UNSC Resolutions, including their external aspects. No unilateral actions should be taken that could raise tensions on the island and prevent the resumption of talks. On Varosha, Türkiye must immediately reverse the unilateral actions announced on 20 July 2021 and all steps taken since October 2020 that run contrary to the relevant UNSC Resolutions. The EU underlines the importance of the status of Varosha and calls for full respect of UNSC Resolutions (particularly Resolutions 550, 789 and 1251).

### **Peaceful settlement of border disputes**

The positive climate and re-engagement between Türkiye and Greece continued. In addition to a number of ministerial meetings, the Greek Prime Minister and the Turkish President met in September 2024 in New York during the UN General Assembly, in November 2024 in Budapest on the sidelines of the European Political Community Summit, and in June 2025 in The Hague on the sidelines of the NATO Summit. On 20 October 2025, the two Ministers of Foreign Affairs met in the margins of the Ministerial Meeting on Cross-Regional Security and Connectivity in Luxembourg.

On the basis of the December 2023 Athens Declaration on Friendly Relations and Good Neighbourliness signed by the two leaders, Turkish and Greek delegations met several times to discuss military confidence-building measures, complemented by separate meetings between both countries' respective coast guard authorities. The last round of political dialogue at the level of Deputy Foreign Ministers was held in Ankara on 12 June. The implementation of the short-stay tourist visit scheme for Turkish nationals to visit 12 Greek islands in order to promote people-to-people contacts between Greece and Türkiye was extended. Despite the positive atmosphere and the ongoing dialogue, the unresolved dispute over the continental shelf and the exclusive economic zones continued to strain bilateral relations. In April 2025, Türkiye rejected the publication of the Greek Maritime Spatial Plan, which Greece must draw up and implement under the relevant Directive<sup>8</sup>, while declaring its

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<sup>8</sup> Directive 2014/89/EU of the European Parliament and of the Council of 23 July 2014 establishing a framework for maritime spatial planning.

readiness to cooperate with Greece in the Aegean Sea. In June 2025, Türkiye presented its maritime spatial planning, challenging Greece's sovereign rights and jurisdiction. In August 2025, it announced the establishment of two marine parks extending into areas under Greek jurisdiction. Türkiye also persisted in objecting to Greece's establishment of three marine parks entirely within Greek territorial waters. Türkiye continued to systematically issue general navigational warnings – ostensibly for aeronautical exercises – making demilitarisation claims regarding Eastern Aegean islands assigned to Greece under international treaties, thereby implicitly challenging Greek sovereignty, sovereign rights and jurisdiction. The inclusion of the doctrine of “Blue Homeland” (Mavi Vatan) in Turkish school textbooks is a cause of concern.

The possible extension of Greek territorial waters to 12 nautical miles in the Aegean Sea under Article 3 of the UN Convention on the Law of the Sea (UNCLOS) continued to weigh on Greece–Türkiye relations. The 1995 declaration of the Turkish Grand National Assembly that any unilateral action by Greece to extend its territorial waters would be considered a *casus belli* still holds.

No flights of Turkish military jets over Greek inhabited areas have been reported since February 2023. There were several months of near-zero incidents, but subsequently violations of Greek airspace and traffic regulations were reported. Türkiye continued to impede survey activities for the Great Sea Interconnector, an EU project of common interest. Türkiye insists on its plans for an electricity interconnector with the so-called, internationally non-recognised, ‘Turkish Republic of Northern Cyprus’ in the nongovernment controlled areas of the Republic of Cyprus. Violations of Greek territorial waters continued to be reported, with a noticeable increase in incidents compared with the previous reporting period.

Türkiye is expected to make an unequivocal commitment to good neighbourly relations, international agreements and the peaceful settlement of disputes having recourse, if necessary, to the International Court of Justice. Türkiye must: (i) avoid threats and actions that damage good neighbourly relations; (ii) normalise its relations with the Republic of Cyprus; and (iii) respect the sovereignty of all EU Member States over their territorial sea and airspace as well as all their sovereign rights, including the right to explore and exploit natural resources in accordance with EU and international law, in particular the UNCLOS.

The 2019 memorandum of understanding (MoU) on the delimitation of maritime jurisdiction areas between Türkiye and the Libyan Government of National Unity (GNU) infringes the sovereign rights of third states, does not comply with the UNCLOS and cannot produce any legal consequences for third states. Türkiye has still not ratified the October 2022 MoU between Türkiye and Libya's GNU for the development of bilateral scientific, technical, technological, legal, administrative and commercial cooperation in the field of hydrocarbons on land and at sea. In June 2025, Libya's National Oil Corporation signed an MoU with Türkiye's state oil company (TPAO) to conduct geological and geophysical studies in four offshore areas. This agreement strengthens the operationalisation of the 2019 MoU.

### **Regional cooperation**

Good neighbourly relations are an essential part of Türkiye's accession process. In the reporting period, bilateral relations with other enlargement countries were good. However, they remained challenging with some neighbouring EU Member States, particularly Greece and Cyprus. Tensions in the Aegean and Eastern Mediterranean have been markedly reduced after the February 2023 earthquakes, and this continued during the reporting period. Türkiye should avoid actions that could undermine regional stability. Illegal unreported and unregular (IUU) fishing activities of Türkiye's flying vessels continue to be reported. The EU

remains committed to defending its interests and those of its Member States as well as to upholding regional stability.

Türkiye's policy in the **Western Balkans** remained aligned with the EU's strategic objectives of regional stability, Euro-Atlantic integration and economic development. The EU and Türkiye hold regular political consultations on the Western Balkans, most recently in September 2025. Türkiye portrayed itself as an EU partner in the region, while leveraging its distinctive cultural, religious and economic ties. In July 2025, the inaugural meeting of the 'Balkans Peace Platform' took place in Istanbul, with the participation of Foreign Ministers from the region (Türkiye and the six Western Balkan countries). In October 2024, the Turkish President visited the Western Balkan countries. Trade and economic cooperation, as well as investment opportunities, remained the main topics on Ankara's bilateral agenda with all Western Balkan countries, thus providing for regional connectivity, stability and security. Strengthening military and defence cooperation became a standing bilateral item, in line with Türkiye's commitment to strengthening military capabilities and modernising the armed forces of Western Balkans countries. This positioned Ankara as an arms exporter and boosted its investments in the defence industry and its collaboration, training activities, and provision of equipment and logistical support, all within the framework of bilateral military cooperation agreements. Bilaterally, Türkiye continued to ask all countries to act against the Gülen movement and its alleged members, calling for extraditions and closures of affiliated schools and businesses.

Türkiye and **Albania** strengthened their strategic partnership and bilateral ties across multiple sectors. High-level visits took place within the framework of the Strategic Cooperation Council. In October 2024, the Turkish President and the Albanian Prime Minister inaugurated the Namazgah mosque of Tirana, which was built with the support of the Turkish Presidency of Religious Affairs (Diyanet) and is now the largest mosque in the Balkan region. Türkiye continued to support the modernisation of the Albanian Armed Forces.

Türkiye remained a close partner of **Bosnia and Herzegovina**, committed to its political unity, territorial integrity and sovereignty. It maintained regular contacts with all members of Bosnia and Herzegovina's tripartite Presidency, with strong diplomatic ties and frequent visits at all levels. Türkiye stated its willingness to engage with all parties in the country and the region, including through bilateral and trilateral formats, stressing the importance of regional stability and security.

Türkiye maintained good relations with **Serbia**, considering it as an important country for regional stability. The fourth meeting of the Türkiye-Serbia High-level Cooperation Council took place in Belgrade in October 2024, chaired by the two Presidents, who agreed to strengthen defence cooperation. Disagreement over Türkiye's support to Kosovo's membership of international organisations (the Council of Europe) remains.

Türkiye maintained strong cultural and economic ties with **Kosovo**\* and continued to advocate for its international recognition. Cooperation in the defence industry continued. Türkiye supports Kosovo's stability, territorial integrity, development and integration with European and Euro-Atlantic institutions. In this regard, Türkiye supports the Belgrade-Pristina Dialogue Process.

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\* This designation is without prejudice to positions on status and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

Türkiye's relations with **Montenegro** remained stable, with frequent meetings, most recently at the 2025 Antalya Diplomacy Forum. In December 2024, the President of Montenegro visited Ankara and agreed with the Turkish President to set up a high-level strategic council.

Türkiye and **North Macedonia** have a Strategic Partnership Agreement and continued to engage actively. In February 2025, the Turkish President and North Macedonian Prime Minister agreed to set up a high-level cooperation council, thus institutionalising further bilateral ties. A framework agreement on military cooperation was also signed.

Türkiye's relations with **Georgia** are at the level of a strategic partnership, with regular high-level contacts, including in the framework of a high-level strategic cooperation council. Türkiye supports Georgia's sovereignty and territorial integrity, as well as its Euro-Atlantic aspirations. Türkiye is Georgia's largest trading partner after the EU, and a cultural cooperation programme for 2024-2028 was signed in 2024. Türkiye and Georgia cooperate on major energy projects. Active cooperation also takes place for the development of the Middle Corridor. The strategic trilateral cooperation format between Türkiye, Georgia and Azerbaijan continues at high level in view of enhanced regional energy and transport connectivity, as well as security cooperation.

Türkiye and the **Republic of Moldova** maintained strong diplomatic relations and their strategic cooperation. High-level exchanges focused on economy, trade, energy and cooperation in the Black Sea region, as well as Turkish support for projects in Gagauzia. Türkiye supports Moldova's sovereignty and territorial integrity.

Türkiye's relations with **Ukraine** remained of strategic significance, and several high-level contacts took place. Türkiye consistently supported Ukraine's sovereignty and territorial integrity and continued to highlight its facilitation and potential mediation role, as underpinned by hosting direct talks between Russia and Ukraine in Istanbul in May, June and July 2025. Türkiye continued to refrain from aligning with the EU's restrictive measures against Russia in relation to the latter's war of aggression against Ukraine. Nevertheless, it continued to make efforts to prevent the circumvention of sanctions against Russia via Turkish territory, delivering some results. In August 2024, Ankara ratified the free trade agreement with Ukraine (signed in March 2022). Cooperation in the defence industry continued. Türkiye has expressed strong interest in Ukraine's reconstruction, marked by the inaugural meeting of the Turkish-Ukrainian 'Reconstruction Task Force'. Türkiye is part of the 'Coalition of the Willing' initiative.

#### 4. ABILITY TO ASSUME THE OBLIGATIONS OF MEMBERSHIP

##### CLUSTER 2: INTERNAL MARKET

This cluster covers: free movement of goods (Chapter 1), freedom of movement for workers (Chapter 2), right of establishment and freedom to provide services (Chapter 3), free movement of capital (Chapter 4), company law (Chapter 6), intellectual property law (Chapter 7), competition policy (Chapter 8), financial services (Chapter 9), and health and consumer protection (Chapter 28). This cluster is key to the good functioning of the EU-Turkey Customs Union and to integrating Türkiye into the EU's internal market.

##### Chapter 1: Free movement of goods

*The free movement of goods ensures that many products can be traded freely across the EU based on common rules and procedures. Where products are governed by national rules, the principle of the free movement of goods prevents these from creating unjustified barriers to trade.*

## General principles

The EU framework for the free movement of goods is largely in place. During the reporting period, Türkiye resolved some barriers liable to affect the free movement of goods in the internal market and the alignment with the EU common commercial policy, in the context of intensified engagement on the implementation of the Customs Union under the High-Level Trade Dialogue. Specifically, Türkiye resolved the difficulties faced by EU operators in obtaining alcohol banderols. The licensing system for second-hand goods, including the issue of re-treaded tyres has become obsolete on the understanding that Türkiye would swiftly grant import licences to products that show characteristics of the circular economy. In addition, progress was made in the implementation of the risk-based TAREKS system for product safety controls at imports and the exemption of a prioritised list of EU products from the scope of the import surveillance regime. On preferential quotas for live bovine and beef meat for EU operators, Türkiye restarted imports from the EU, yet a transparent administration of the quota system remains an issue.

However, no developments were made on the elimination of export taxes on hides, skins, and wet-blue leather. Türkiye still applies artificial exchange rate on pharmaceutical products and does not accept the EU's good manufacturing practices (GMP) certificates. It retained local content requirements in renewable energy and tobacco products. Türkiye's TAREKS system for product safety controls at imports may require additional documentation and information, which is also contrary to the Customs Union rules.

Türkiye needs to resolve all outstanding trade barriers between the EU and Türkiye as listed in the Access2Market database.

## Non-harmonised areas

Türkiye's mutual recognition legislation in the non-harmonised areas is in line with the EU *acquis*. However, Türkiye has notified only one product legal act in the non-harmonised areas in 2024, and no notification was made in 2025 until now. This is not sufficient, given the size of Türkiye's economy and legislative activity and its close ties with the European Union's economy via the Customs Union.

## Harmonised areas: quality infrastructure

Türkiye is aligned with the EU *acquis* on standards, technical regulations, conformity assessment, accreditation, metrology and market surveillance. The national **Standards Institute** is a full member of the European standards bodies. By the end of the second quarter of 2025, it had adopted 24 597 national standards aligned with European standards. The rate of harmonisation with both CEN and CENELEC standards is 99.5%.

Türkiye has 67 notified bodies, six recognised third-party organisations, and two technical approval bodies in place. The Turkish **Accreditation Agency** (TÜRKAK), a member of European co-operation for Accreditation (EA), has launched new accreditation services for verification bodies operating under the ISO standards on product carbon footprint and water footprint, and for certification bodies on artificial intelligence systems, which may have relevance to free movement of goods in the future. Türkiye implements **market surveillance** in compliance with the EU *acquis* and submits its annual programme to the European Commission. However, the coverage and effectiveness of market surveillance measures should be strengthened. Türkiye adopted a regulation on market surveillance of products placed on the market through means of distance sales in October 2024, aiming to align with the EU *acquis*. There is still limited market surveillance on e-commerce activities. According to the market surveillance report for 2024, a total of 262 898 products were checked by market surveillance authorities in 2024 representing a 26% increase as compared with 2023.

### Harmonised area: sectoral legislation

On the EU '**new and global approach**' product *acquis*, Türkiye adopted legislation designed to align with the latest *acquis* on the eco-design and energy-labelling of various household products.

On the EU '**old approach**' product *acquis*, Türkiye adopted new legislation on motor vehicles, in particular relating to automated driving systems of fully automated vehicles, advanced driver distraction warning systems, intelligent speed assistance system, driver drowsiness and attention warning system, alcohol interlock installation facilitation and event data recorders of vehicles. Amending legislation were adopted on the type of approval and market surveillance of motor vehicles and their trailers, on eCall in-vehicle system and type approval of two- or three-wheel vehicles and quadricycles. On pharmaceuticals, Türkiye issued legislation on market control of medicinal products and food for special medical purposes and withdrawal of such products from the market. Amending legislation were issued on the granting of marketing authorisation for pharmaceuticals, homeopathic medicines and traditional herbal medicines. Türkiye does not accept EU good manufacturing practice certificates on medicines for human use. Türkiye has in place a regulatory data protection regime since 2005. However, the scope is limited and excludes biologics and combination products. Inadequate protection of undisclosed test and other data generated to obtain marketing licensing for pharmaceutical and agrochemical products do not converge with the EU *acquis*. On chemicals, Türkiye remains partially aligned with the EU Regulation on registration, evaluation, authorisation and restriction of chemicals (REACH).

On **procedural measures**, Türkiye has specific licensing and regulation systems for economic operators dealing with **drug precursors**, with a strict follow-up and monitoring system in cooperation with the police and customs. It is aligned with the EU *acquis* on licensing procedures for **firearms**. However, it made no developments on alignment with the *acquis* on **cultural goods**.

On **anti-corruption**, the product safety law and regulations on conformity assessment bodies and notified bodies, market surveillance and accreditation contain rules on transparency, impartiality and prevention of conflicts of interest. Turkish Accreditation Body TÜRKAK has an ethical commission and ethical guidelines in place.

### **Chapter 2: Freedom of movement for workers**

*Citizens of one Member State have the right to work in another Member State and must be given the same working and social conditions as other workers.*

Regarding **access to the labour market**, certain restrictions remain. Notably, employment in the following industries require Turkish citizenship: legal, dentistry, nursing, pharmacy, veterinary, security, fish exportation, diving, maritime pilotage and captainship, engineering and as a mariner on ships within the territorial waters, as a managing director in private health institutions, as a customs brokerage, and in tourist guiding. In 2024, a total of 300 852 work permits were issued for citizens from more than 13 EU countries, compared with 239 835 in 2023.

Türkiye did not make any progress on access to the labour market or in preparing for future participation in the **European Employment Services (EURES) network**. Türkiye maintains six labour force agreements with EU Member States, but made no progress in preparing to join the **European Labour Authority**. Progress in aligning with the European Skills, Competences, Qualifications, and Occupations classification also remains modest.

No progress was made in the **coordination of social security systems**. Türkiye remains a party to the European Convention on Social Security. The number of bilateral social security

agreements with EU Member States remains unchanged, with 15 agreements concluded.

### Chapter 3: Right of establishment and freedom to provide services

*EU natural and legal persons have the right to establish themselves in any Member State and to provide cross-border services. For certain regulated professions, there are rules on mutual recognition of qualifications. EU rules on postal services focus on improving the quality of universal service, gradual market opening to competition, and the establishment of an independent regulator.*

There was no progress on the **right of establishment**, which remains restricted by several requirements in Türkiye. On the **freedom to provide cross-border services**, service providers registered in the EU still face requirements on registration, licensing and authorisation. The point of single contact has not yet been created. There is no specific regulation or practice governing the temporary or occasional provision of services.

On **postal services**, Türkiye is partially aligned with the Postal Services Directive and the Regulation on cross-border parcel delivery services. A reserved area in the letter mail market is maintained for the universal service provider, although in practice the postal monopoly for letter mail service is limited to official notification. There are currently 56 other postal operators active in the postal market. During the reporting period, an amendment to the Regulation on the authorisation on the mail sector entered into force, whereby authorisation requirements were updated to include courier services offered via digital platforms into the postal sector. Türkiye still needs to abolish the regulatory postal monopoly and introduce accounting separation at the universal service provider, and ensure the national regulatory authority with the appropriate powers and means to guarantee its independence.

On **mutual recognition of professional qualifications**, the Vocational Qualifications Authority (VQA) continued to implement the national qualification framework. Türkiye has drawn up a list of 341 regulated professions. However, in accordance with national legislation, certain professions require additional mandatory certification from the VQA beyond the recognition of professional qualifications which contradict the *acquis*. As of April 2025, the number of occupations requiring certification remains at 204, while the number of national occupational standards increased to 925 and 691 national qualifications were aligned with these standards. Türkiye distinguishes between the recognition of qualifications for academic purposes and the recognition of professional qualifications for access to regulated professions, in line with the *acquis*. The Turkish Referencing Report to the European Qualifications Framework is not updated. It is possible to apply online for the recognition and equivalence of higher education qualifications. However, some regulated professions remain reserved for Turkish nationals, and language requirements for access to certain professions have not been removed. Türkiye also needs to intensify its efforts in the alignment with the minimum training requirements for seven sectoral professions (medical doctors, dental practitioners, nurses responsible for general care, midwives, pharmacists, veterinary surgeons, and architects). Continuous and significant steps are needed to align national legislation with the EU *acquis* in this area.

### Chapter 4: Free movement of capital

*In the EU, capital and investments must be able to move without restrictions, with common rules for cross-border payments. Banks and other economic operators apply certain rules to support the fight against money laundering and terrorist financing.*

On **capital movements and payments**, restrictions on foreign ownership remain in many sectors, including broadcasting, education, transportation, financial services, the electricity market and real estate. Türkiye's legislation on real estate acquisition by foreigners still does

not apply to all EU nationals in a non-discriminatory way. Immovable property acquisition by citizens of neighbouring countries in border provinces remains restricted for national security reasons. Following an amendment introduced to the Decision on the Protection of the Value of Turkish Currency, people residing in Türkiye must utilise intermediary Turkish banks whenever obtaining loans from abroad. Meanwhile, the obligation for people residing in Türkiye to pay in Turkish lira in movable property contracts (except for vehicle sales contracts) was removed in March 2025, enabling payments to be made once again in foreign currency. While the minimum share for exporters to sell of their foreign-earned incomes to the central bank was lowered from 30% to 25% in February 2025, it has since been increased to 35% in May 2025 until 31 July 2025.

In the area of **payment services**, Türkiye advanced the implementation of the Instant and Continuous Transfer of Funds (FAST) system. The FAST Request-to-Pay overlay service, which has been available only for private individuals since 2024, was updated in January 2025 to allow access for corporate customers. The central bank aimed to ensure more secure data sharing, strengthen customer information protection and ensure a more robust digital infrastructure in the payment systems through legislative amendments.

As regards the **fight against money laundering and terrorist financing**, Türkiye still needs to align more closely with the EU *acquis* and FATF recommendations to further strengthen its anti-money laundering and counter-terrorist financing (AML/CFT) framework. In 2025, the country entered the fifth round of mutual evaluation under the revised FATF standards. In line with FATF recommendations, Türkiye placed particular focus on developing strategies and conducting risk assessments.

During the reporting period, Türkiye has also introduced strict AML/CFT regulations for cryptocurrencies and their service providers. With the recent amendments, digital currency service providers and platforms must verify user identities for transactions over a certain threshold and flag or block transfers deemed risky, especially from unregistered wallets. All crypto service providers are required to obtain a licence and comply with ongoing oversight and reporting obligations. Türkiye has not aligned its regulatory and legal framework with EU Regulation 2023/1113. While Turkish law mandates traceability data for traditional wire transfers under FATF standards, it lacks equivalent obligations for crypto asset transfers.

Türkiye has also continued to strengthen its financial intelligence unit (MASAK,) and has improved the use of financial intelligence in criminal investigations. It is now standard practice for prosecutors to request AML/CFT input from MASAK when building cases related to relevant predicate offences.

MASAK has also developed a well-established information-sharing mechanism with financial market players.

Further measures have been taken to ensure that penalties for AML/CFT violations and the rules governing beneficial ownership are both effective and dissuasive. In April 2024, the Turkish Constitutional Court annulled key provisions of Law No. 7262 on the Prevention of the Financing of the Proliferation of Weapons of Mass Destruction, citing infringement on freedom of association. In the reporting period, no new legislation has been enacted to replace the annulled provisions]. This leaves a gap in the regulatory framework on ensuring a proportionate and risk-based approach to NPO monitoring. The Constitutional Court initially annulled lawyers as obliged entities due to professional secrecy concerns. However, the legislation was amended in July 2024 to reintroduce lawyers as obliged entities, incorporating revised provisions and safeguards for legal professional privilege. The sufficiency of these new safeguards for AML/CFT reporting and attorney-client privilege is still under assessment.



## Chapter 6: Company law

*The EU has common rules on the formation, registration and disclosure requirements of a company, with complementary rules for accounting and financial reporting, and statutory audit.*

On **company law and corporate governance**, Türkiye adopted some legislative acts during the reporting period, but the legislation on domestic mergers and divisions, takeover bids, shareholders rights, including long-term shareholder engagement and the use of digital tools and processes in company law, still require full alignment with the EU *acquis*. On business registrations, Türkiye lacks rules requiring all limited liability companies to publish annual accounts.

On **company reporting**, the Public Oversight, Accounting, and Auditing Standards Authority (POA) made assurance audits for sustainability reporting mandatory in September 2024. The POA continued to reflect changes in international standards into national standards in several areas. These includes financial reporting standards allowing medium-sized enterprises to prepare their financial statements at a lower cost, a code of ethics for independent auditors, and auditing criteria for independent audit. In December 2024, the POA updated the financial reporting standard for large and medium-sized companies (BOBI FRS) to regulate accounting principles and classification of cryptocurrency assets. The alignment of non-financial information and government payment reports remains unclear, particularly on EU non-financial reporting standards (PTF-NFRS) and Directive 2013/34/EU.

## Chapter 7: Intellectual property law

*The EU has to a large extent harmonised rules for the legal protection and enforcement of intellectual property rights (IPR), covering notably patents, biotechnological inventions and pharmaceuticals, including supplementary protection certificates (SPCs), trade marks, designs, geographical indications (GIs), including craft and industrial GIs, as well as copyright and related rights.*

On **copyright and related rights**, the Turkish Law is yet to be aligned with the Directives on copyright and related rights to ensure sufficient protection, in line with technological developments. Notably, legal protection against the circumvention of technological protection measures (TPMs) for authors, performers and phonogram producers, or protection of rights management information (RMI) are not adequate. Several challenges persist, particularly the weak or non-existent compensation for exceptions such as lending rights and exceptions in education as well as the lack of distribution of private copying levies to the rightsholders and the licensing difficulties. Online piracy continues to be of very high concern in Türkiye, undermining economic opportunities for domestic and foreign rightsholders. The enforcement against online copyright piracy remains ineffective in Türkiye.

On **industrial property rights**, regarding trade marks, considering lack of 'bad faith' to be an absolute ground of refusal in the first instance renders the cancellation procedure ineffective. The amendment of the regulation on administrative procedures for the revocation of trade marks entered into force in March 2025, making the Turkish Patent and Trade Mark Office responsible to examine requests for revocations. Stakeholders report expensive and lengthy procedures to revoke, oppose and invalidate trade marks need to be improved. Stakeholders also report that the trade mark registration system is unpredictable and unclear. Administrative examinations are currently not being carried out and therefore uncertainties regarding the administrative trade mark cancellation procedure persist. The cancellation procedure as well as the opposition or invalidation of a trade mark, are disproportionately expensive and excessively long.

There are currently no laws for the protection of supplementary protection certificates. Türkiye's regulatory data protection regime in place since 2005 has a limited scope excluding biologics and combination products. Inadequate protection of undisclosed test and other data generated to obtain marketing licensing for pharmaceutical and agrochemical products do not converge with the EU *acquis*.

On **judicial enforcement**, criminal courts rarely order deterrent fines for commercial scale industrial property infringements, even though laws may provide for higher penalties. Inefficient litigation procedures, including at courts of appeal, still need to be resolved. Challenges and inconsistencies persist in deciding preliminary injunctions and monetary compensation claims, in the storage and destruction processes and related financial burdens, and in the overuse of expert witness statements. Difficulties persist with the issuance of search and seizure warrants even when strong evidence of counterfeiting is provided by right holders. Enforcement authorities need to increase the efficiency of action against industrial property infringements.

The **customs enforcement** legislation is not fully harmonised with the EU *acquis*. Despite an increasing number of customs applications for seizures (up from 2 869 in 2023 to 3 031 in 2024), it is necessary to improve customs enforcement to combat counterfeit goods, particularly those in transit and exports. While cooperation between customs authorities and rights holders increased, additional efforts are required to strengthen the protection and enforcement of IPR. According to the last report on the EU enforcement of IPR, Türkiye ranked third in the top provenance economies of counterfeit and pirated goods in terms of customs seizures in 2023. Its share of global seizures at the EU borders is 8.42%. In 2023, Türkiye was also the third country of provenance (12%) by value as regards infringing goods detained in the EU Member States customs.

Türkiye needs to increase public awareness on the risks of counterfeiting and piracy, particularly on the impact on health, safety, rule of law and employment, while also emphasising the economic benefits of IPR-intensive industries. Stronger political commitment is needed to enforce IPR, both inland and at the border, and prevent high volume of counterfeit goods to enter the EU.

## Chapter 8: Competition policy

*EU rules enable free competition. They include antitrust rules against restrictive agreements between companies and the abuse of a dominant position, and also include rules on concentrations between companies which would significantly impede effective competition. EU rules also set out a system of State aid control. Governments are only allowed to grant State aid if strict conditions are met, with a view to prevent distortion of competition.*

### Antitrust and mergers

The **legal framework** remains broadly aligned with the EU *acquis*. The Law on the protection of competition broadly reflects Articles 101 and 102 of the Treaty on the Functioning of the European Union (TFEU). Implementing legislation in this field remains largely in place. The relevant legislation still needs to be aligned to ensure full compliance with the Vertical Block Exemption Regulation. In December 2024, the Turkish Competition Authority (TCA) renewed and published a regulation on administrative fines for competition infringements, allowing more discretion in determining administrative fines regardless of limitations and based on the nature and severity of the violation.

The **institutional framework** is in place. The Law on the protection of competition is enforced by TCA. The TCA maintains its financial and administrative autonomy. The TCA's enforcement capacity is adequate. In 2024, overall **implementation** was effective. Decisions

were taken in the areas of antitrust (166 compared with 145 in 2023), exemption/negative clearance decisions (10 compared with 8 in 2023) and merger/acquisition/joint venture/privatisation (254 compared with 217 in 2023). In 2024, the total amount of fines imposed by the TCA for infringements of competition law (fines related to substance) increased considerably to TRY 7.5 billion compared with TRY 1.9 billion in 2023. The number of *ex officio* investigations launched by the TCA increased in the last two years (70 in 2023 and 80 in 2024, while the previous 3-year average was 13). In 2024, Turkish courts upheld 65% (decreased from 87% in 2023) of the 119 judgments concluded in response to appeals against the TCA decisions.

### State aid

No progress was made on **legislative framework**. Overall, Türkiye's Law on the monitoring and supervision of State aid is broadly aligned with Articles 107 and 108 TFEU. However, Türkiye's legislative framework is *de facto* ineffective due to the indefinite suspension of the implementation of the State aid law.

There is no functioning **institutional framework** and the administrative structure in force significantly deviates from the EU *acquis*. Therefore, Türkiye still needs to align its legislation with the EU *acquis*.

In May 2025, Türkiye published a new incentive scheme repealing the former 2012 incentive scheme, as well as the supplementary schemes (technology-driven industry initiative and the centres of attraction programme). Türkiye continued the implementation of the selective project-based incentive schemes for large scale investments. The committed amount for project-based investment programme declined to TRY 496 billion supporting 58 projects, as a result of cancellation by the President of 11 projects worth TRY 54 billion in 2024. The lack of a transparent State aid inventory covering all aid schemes, including the amount or budgeted amount of the state support granted, remains a source of concern. The transparency of the State aid further deteriorated following the Presidency decision in November 2024 allowing the government not to publish the project-based investment support decisions. Such deficiencies were not addressed by the new incentive scheme.

### Liberalisation

State-owned enterprises are subject to competition and in theory to State aid rules.

## **Chapter 9: Financial services**

*EU rules aim at ensuring fair competition among financial institutions and the stability and integrity of financial markets, namely in the field of banking, insurance, supplementary pensions, investment services and securities. They include rules on authorisation, operation and supervision of these institutions.*

On **banking and financial conglomerates**, Türkiye continued taking steps to gradually simplify the regulatory environment. The banking sector continued demonstrating resilience, with its capital adequacy ratio remaining above the legal thresholds. Regardless of tighter financial conditions, the deterioration in asset quality indicators remains limited. The non-performing loan ratio stood at 2.1% in June 2025.

Regarding **insurance and occupational pensions**, in January 2025, the Insurance and Private Pension Regulation and Supervision Agency (SEDDK) published an amending regulation on insurance agencies, mainly determining new minimum paid-in capital and equity requirements for the authorisation and operational permits, revising the supervision conditions of insurance agency activities and expanding the responsibilities of agencies.

As regards **financial market infrastructure**, Turkish legislation continues to be partially aligned with the EU *acquis*. In March 2025, the requirement for trading derivatives exclusively on organised exchanges was removed. According to the new legislative framework, these transactions can now be conducted through intermediary institutions and banks; as long as they comply with capital markets regulation. Furthermore, Turkish residents are now allowed to engage in derivative transactions with foreign financial institutions at their own discretion, as long as no targeted promotional activities are conducted.

On **securities markets and investment services**, significant regulatory changes were introduced as regards the principles for venture capital investment funds. Following an amendment, venture capital investment funds must invest 51% of their assets in companies located in Türkiye, down from 80%. Moreover, the requirement for companies to be either joint-stock companies or limited liability companies in order to invest in companies established abroad has been abolished. Meanwhile, venture capital investment funds can now be established as umbrella funds or fund baskets. Under certain conditions, investments with Simple Agreement for Future Equity agreements are also recognised as venture capital investments. A resolution on sales methods and distribution principles to be applied in initial public offerings was taken with the aim of ensuring that investor demand is effectively met in the initial public offerings of non-public companies.

On **sustainable and digital finance**, the CMB adopted detailed secondary regulations in March 2025, enhancing the legal framework for crypto assets, by setting out rules for crypto asset service providers, including their establishment and operational principles, governance standards, capital adequacy requirements, and information system audits. Meanwhile, the BDDK laid down the procedures and principles for calculating and reporting the green asset ratio and other key indicators of banks' contributions to financing environmentally sustainable activities.

## Chapter 28: Consumer and health protection

*EU rules protect consumers' economic interests and also ensure product safety, prevent dangerous imitations and establish liability for defective products. The EU also ensures high common standards for tobacco control, blood, tissues, cells and organs, and human and veterinary medicinal products. The EU also guarantees a high level of protection of public health and in particular has rules for upholding patients' rights in cross-border healthcare and in preparing for and responding to serious cross-border health threats, including communicable diseases.*

### Consumer protection

On **product safety related issues**, consumers' awareness of the national unsafe products information system remains low. Regular monitoring and more robust regulatory tools are required to combat online sales of counterfeit goods that endanger consumer and public health (see *Chapter 7 – Intellectual property law*). Moreover, although the volume of online shopping has increased, the market surveillance of e-commerce remains limited (see *Chapter 1 – Free movement of goods*).

Türkiye's national legislation remains mostly aligned with the EU *acquis* on consumer protection in **non-safety related issues**. The alignment with the Representative Actions Directive remains at an early stage and significant work is needed. Challenges remain with the application of consumer rights. Consumer awareness and education, cooperation and coordination of sectoral stakeholders remain weak. Consumer arbitration committees need to ensure better enforcement of consumer rights.

### Public health

On **horizontal aspects**, there was no movement towards putting into action the One Health Strategy. In the enhancement of Türkiye's capacities on key public health microbiology service capacities against public health threats, the strategy plan on national genomic sequencing was approved and workforce empowerment continued. The government's population-growth strategy resulted in a decline in trained reproductive healthcare professionals, limited access to contraception and prenatal care – especially in rural areas – and fewer public hospitals offering abortion services.

Progress continued on serious cross-border health threats including epidemic preparedness for **communicable diseases**, enhancing the health system's response capabilities. Türkiye's Field Epidemiology Training Programme joined the Global Field Epidemiology Partnership, strengthening international collaboration. Surveillance efforts were expanded through nationwide outbreak investigations and development of a Vector Surveillance Roadmap for pilot implementation. No updates were reported on antimicrobial resistance since the implementation of the latest National Antimicrobial Resistance Strategic Action Plan (2017-2022).

On **tobacco control**, Türkiye launched the "Smoke-Free Türkiye" campaign with a national action plan for 2024-2028, aiming to reduce smoking rates and encourage a healthier lifestyle.

On **blood, tissues, cells and organs**, the organ donor donation rate continued to decline – the number of patients awaiting organ transplants exceeded 33 000. Türkiye needs to align with the new EU *acquis* on substances of human origin, which replaces the previous directives on blood, tissues and cells.

The country is not aligned with the EU *acquis* on **patients' rights in cross-border healthcare**. Türkiye must also align with the new EU Regulation on Health Technology Assessment (EU) 2021/2282 which entered into application in January 2025.

On **mental health**, Türkiye continued to implement a de-institutionalisation policy, expanding services to 284 healthy life centres in urban areas, in addition to 182 existing community mental health centres. However, Türkiye is yet to adopt a stand-alone mental health law.

On **health inequalities**, infant and under-5 child mortality remained high at 9 and 11.1 per 1 000 live births respectively, with significant disparities in the southeastern, eastern, and central provinces. Türkiye also exhibits considerable inequalities in the regional distribution of doctors, hospital beds, and hospitals. Access to safe motherhood and sexual and reproductive health services remains a critical issue, especially for women and adolescents.

For cervical cancers, 3 527 259 women (30-65) received cervical **cancer screening** at primary and secondary levels in 2024. Türkiye needs to include the human papillomavirus infection (HPV) vaccine in the Expanded National Immunisation programme for children under the age of 15, including both girls and boys.

On **anti-corruption**, regulations on market surveillance contain rules on transparency, impartiality and prevention of conflicts of interest (see *Chapter 1 – Free movement of goods*). However, there is no anti-corruption plan on public health.

### CLUSTER 3: COMPETITIVENESS AND INCLUSIVE GROWTH

This cluster covers: digital transformation and media (Chapter 10), taxation (Chapter 16), economic and monetary policy (Chapter 17), social policy and employment (Chapter 19), industrial policy (Chapter 20), science and research (Chapter 25), education and culture (Chapter 26), and Customs Union (Chapter 29).

## Chapter 10: Digital transformation and media

*The EU supports the smooth functioning of the internal market for electronic communications, electronic commerce and audiovisual services. The rules protect consumers and support the universal availability of modern services.*

On **electronic communications**, Türkiye is not yet aligned with the European Electronic Communications Code and concerns remain over the lack of financial and administrative independence of the regulatory authorities. More transparency is needed in the Telecommunication Regulatory Authority's revenue transfers and its use in establishing a consumer-friendly telecommunication market. Further regulatory and administrative steps are required to create a competitive and consumer-friendly market in telecommunications, such as effective structural separation of the regulatory functions from activities associated with ownership or control, appointment and dismissal rules of the board and independence from State bodies.

On **digital services**, the Ministry of Trade adopted an amending regulation on e-commerce intermediary service providers and e-commerce service providers, imposing new requirements on platforms regarding verification of sellers' information, unfair trade practices, keyword advertising, data usage and sharing, auditing and reporting obligations. Türkiye's e-commerce market expanded further by recording an increase of 61.4% in terms of financial volume in Turkish lira and by 1% in terms of number of transactions in 2024. The proportion of individuals using the internet in buying or ordering goods or services for private use continued increasing. Further implementation efforts are required to ensure and facilitate equal access to online services for all. Türkiye has yet to align with the Digital Services Act and Digital Markets Act.

The revision of some of Türkiye's existing legislation for digital services and its enforcement, including the social media regulations law, the disinformation law and the cybersecurity law, is required due to the laws' incompatibility with the EU Charter and key principles of EU *acquis* for digital services.

The number of services offered by the e-Government Gateway increased from 8 360 in August 2024, to 8 614 as of August 2025. The number of integrated institutions increased from 1 061 in August 2024 to 1101 in August 2025. The number of people using e-government increased from 66.1 million in August 2024 to 67.95 million in August 2025 according to official statistics. Further efforts are required to align with both the European Interoperability Framework and the Interoperable Europe Act.

Regarding digital television broadcasting, Cyprus is still facing an objection from Türkiye to the recording at the International Telecommunications Union (ITU) of a new unified Cypriot digital television broadcasting plan below 700 MHz under the ITU Geneva06 plan. This continues to deprive Cyprus from the necessary regulatory protection against interferences from neighbouring countries.

The lack of sufficient competition on the broadband market remains a concern. While the share of fixed broadband subscribers increased from 23% in 2023 to 23.9% in 2024, it remains below the OECD average of 35.8%. The total number of mobile broadband users was 75.9 million, which corresponds to a penetration rate of 88.6% of the population at the end of 2024, against the OECD average of 134.1%. The number of LTE subscribers continued growing and reached 88.1 million in the first quarter of 2025 compared with 84.9 million at the end of 2023. There was some progress reported in the procurement of 5G as a Presidential decree was published in August 2025 setting the minimum prices for the available frequency packages.

On **artificial intelligence**, Türkiye adopted a new industrial strategy in March 2025 entitled 2030 Industry and Technology Strategy, where building AI capacity and AI applications are considered a priority, which will contribute to broader digitalisation of services in line with the EU's Digital Decade goals. This Strategy provides the policy foundation for reforms needed to meet EU *acquis* while driving the digital transformation of Türkiye's economy. Türkiye needs to continue aligning with the EU's Artificial Intelligence Act, including through the establishment of the necessary enforcement structure.

On **data**, Türkiye has yet to adopt a National Data Strategy to enable a trusted, secure and interoperable data ecosystem in line with the EU Data Governance Act and Data Act.

On **digital trust and cybersecurity**, compliance with the eIDAS Regulation is still pending. The Ministry of Trade published a legislation regulating commercial electronic mail management system integration services, regarding authorisation of such services, determination of their responsibilities and conditions for cancellation of their authorisations, in order to address data protection and cybersecurity risks. Türkiye created institutional disruption in digital policy coordination by abolishing the Digital Transformation Office in March 2025 and creating a not yet operational Cybersecurity Presidency. Defining and operationalising the new structure with clear mandates is critical to drive digital transformation in the country. Türkiye also adopted a cybersecurity strategy and action plan to strengthen the country's cyber resilience and published a law on cybersecurity during the reporting period. Türkiye needs to continue the implementation of the EU 5G Cybersecurity Toolbox measures, including assessing the risk profile of suppliers and putting in place appropriate restrictions and/or exclusions for high-risk suppliers. Türkiye continued building a structured, sector-specific cyber incident response ecosystem to contribute to its alignment with the NIS 2 Directive. As of September 2024, there are 14 sectoral Cyber Emergency Response Teams (CERTs) for critical infrastructures and more than 2 200 institutional CERTs.

On **media**, a revision of the legislation regulating radio, television and on-demand media services is required to ensure clarity in terms of its scope, definitions, licensing criteria, and to remove controversial points relating to jurisdiction and restricting access to online content. Concerns over the impartiality and independence of RTÜK persisted and were not addressed (see Chapter 23 – Judiciary and fundamental rights).

## Chapter 16: Taxation

*EU rules on taxation cover value added tax, excise duties and aspects of corporate taxation. They also cover cooperation between tax administrations, including the exchange of information to prevent tax evasion.*

On **indirect taxation**, as regards VAT, the legislation governing the structure, exemptions, special schemes and the scope of reduced rates of VAT is not fully aligned with the EU *acquis*.

On excise duties, Türkiye's excise duty legislation on cigarette diverges from the EU *acquis*, whereas the overall level of taxation (*ad valorem*) on cigarettes is comparable to EU levels. Excise duty legislation on alcohol and alcoholic drinks also differs from the EU *acquis*. Moreover, Türkiye has reinstated an excise duty differential between raki and similar spirits in December 2024. Excise duties on some energy products remain lower than EU minimum rates. Contrary to the EU *acquis*, coal, coke and electricity are not subject to excise duties, while kerosene is zero rated.

On **direct taxation**, Türkiye still implement 25% corporate income tax, while the financial sector is levied at 30%. In August 2024, Türkiye introduced a minimum 15% corporate

income tax for large multinational enterprises, a 10% local minimum corporate income tax and increased the general corporate income tax for public-private partnerships to 30%. Since 2025, Türkiye is collecting an additional 1% tax on service providers for goods purchased on online marketplaces.

The income tax exemption implemented since 2022 for the minimum wage, including the tax on all wages corresponding to the minimum wage, continued. In 2024, TRY 21 billion was collected as a 7.5% digital services tax (on digital advertising, content, and intermediary services) which has been in effect since March 2020.

**On administrative cooperation and mutual assistance**, the OECD Global Forum on Transparency and Exchange of Information for Tax Purposes (Global Forum) qualified Türkiye as 'largely compliant' on the exchange of information on request. However, the country remains on Annex II to the Council Conclusions on the EU list of non-cooperative jurisdictions for tax purposes for criterion 1.1 (automatic exchange of tax information on financial accounts), as it is still not fully compliant with the relevant requirements. As a result, in February 2025, the Council reiterated its call on Türkiye to begin the outstanding automatic information exchange relationships with Member States in order to meet criterion 1.1 of the EU list.

**On operational capacity and computerisation**, the Turkish Revenue Administration uses an electronic document management system. On the other hand, Türkiye failed to develop a functional integrated public finance management information system. The action plan to combat the informal economy (2023-2025) still lacks performance indicators and a publicly accessible system for monitoring the implementation.

## **Chapter 17: Economic and monetary policy**

*EU rules require the independence of central banks and prohibit them from directly financing the public sector. Member States coordinate their economic policies and are subject to fiscal, economic and financial surveillance.*

**On monetary policy**, the central bank deviated from the official inflation target over the last decade, which is set jointly with the government and consistently aimed at 5%. Concerns over the institutional underpinning of central bank independence persist, with the President of the Republic having extensive powers in the appointment and dismissal of the Central Bank Governor and Board members. In June 2024, the Constitutional Court had annulled the President's powers to dismiss the Central Bank Governor before the end of their term, on the ground that this authority was granted with a presidential decree and not by law. The Court's decision entered into force. However, the Parliament has not adopted the appropriate legislation to replace the relevant annulled articles within the one year given by the Court.

The central bank kept monetary policy tight, which was instrumental in bringing down inflation and inflationary expectations, and improving markedly its foreign exchange (FX) position. It maintained the main policy rate at 50% from March until December 2024, initiating its rate-cutting cycle only at the end of the year. However, in response to financial markets turmoil, following domestic political tensions after the arrest of the mayor of Istanbul, the authorities took prompt and coordinated actions to preserve financial stability. The central bank raised the key policy rate to 46% in April 2025, and resumed its easing cycle only in July (43%). The Turkish authorities continued to simplify the macroprudential policy framework and also took measures to support the monetary policy transmission mechanism and the tight monetary stance, and as well as to manage Turkish lira and FX liquidity. The central bank took gradual steps to accelerate the phase-out of the FX-protected deposit scheme, before terminating the opening and renewal of these accounts



(excluding the Turkish lira Time Deposit Account for Non-Resident Real Persons – i.e. YUVAM accounts) as of 23 August 2025. The decline in the FX-protected deposit balance has enhanced the monetary transmission mechanism and reduced the risks to the central bank's balance sheet.

As regards **economic policy**, significant progress was made in the presentation of a more realistic macroeconomic framework, but further efforts are needed to strengthen the coherence among key macroeconomic targets. Main policy documents do not present alternative macroeconomic and fiscal scenarios. Türkiye is still not aligned with the Directive on Requirements for Budgetary Frameworks and lacks numerical fiscal rules and an independent fiscal body to monitor compliance. A Constitutional Court decision taken in January 2025 cancelled a provision allowing the government to spend excess revenue if the budget deficit limit is respected. Türkiye made some improvements in data quality and timeliness of reporting under the excessive deficit procedure data, but further efforts are required (see *Chapter 18 – Statistics*).

Türkiye submitted its 2025-2027 **Economic Reform Programme** on time. For the first time, the structural reforms section was developed through consultation with civil society organisations. The macroeconomic framework would benefit from the presentation of an alternative scenario, while the fiscal framework could be strengthened by providing further details about the main discretionary fiscal measures. The policy guidance set out in the conclusions of the Economic and Financial Dialogue of May 2024 has been partially implemented, and the rate of implementation improved markedly in comparison to previous years.

### **Chapter 19: Social policy and employment**

*EU rules in the social field include minimum requirements for labour law, equality and non-discrimination, health and safety at work. They also promote social dialogue at European level.*

Türkiye made no progress regarding **labour law**. Applicability of the labour law is hindered by various exemptions and high levels of informality at work with the Roma community particularly affected. Undeclared work remains high at 26.58%, and the figure excludes a vast number of migrant workers. There is a need to create regulatory frameworks for platform work and other emerging sectors. Labour force participation of children aged 15-17 rose to 24.9% in 2024, up from 22.1% in the previous year. Efforts need to be stepped up to eliminate child labour, especially in hazardous work, including renewal of the national programme on the elimination of child labour.

On **occupational safety and health (OSH)**, amendments introduced to implementing legislation aim to ease access to OSH services in low-risk sectors. However, the effectiveness of OSH risk assessment systems at workplace level needs to be increased. Most fatal accidents in the reporting period occurred in the construction sector. The Turkish authorities need to step up implementation of and compliance with the OSH framework. A deadly fire at a winter resort hotel in Bolu Province has revealed gaps and deficits in the OSH system in the tourism sector. Many road accidents involving workers go unreported in various occupational sectors, such as for platform workers or couriers and the seasonal agricultural workers. OSH risks related to the national apprenticeship system (MESEM) need to be addressed, as several fatal accidents have involved apprentice children in secondary education. There is also a need to improve reporting system for occupational diseases. In 2024, the number of labour inspectors increased to 916.

There was no progress on **social dialogue**. Türkiye still does not have a functioning economic and social council. The tripartite consultation board convened. Further substantial

efforts are needed to increase the systematic functioning of the existing tripartite social dialogue mechanisms. The coverage of collective bargaining for workers remained low at 11.33%. The unionisation rate dropped significantly for private -sector employees, reaching 6.83%. For civil servants, it was 76.88%. Only 24.7% of unionised workers are women. In the private sector, serious impediments to unionisation and collective bargaining persist. Effective and dissuasive sanctions are needed against anti-union discrimination, including anti-union dismissals. Türkiye has yet to recognise the right to strike for civil servants; and the right to organise and bargain collectively for certain categories, including prison staff and locum workers. In August 2025, the Government postponed four planned strikes by mine workers at state-owned enterprises, citing national security matters. The systematic use of postponements compromises the right to strike and raises concerns regarding Türkiye's compliance with international labour standards.

On **employment policy**, the number of job and vocational counsellors in the Turkish Employment Agency (İŞKUR) declined. Despite a notable increase in the number of active labour market programmes, including the number of participants, the figures remain well below the levels of the period 2020-2022. The share of the informal economy has decreased but remains structurally high and continues to negatively affect social security and welfare systems. As part of efforts to facilitate migrants' access to the formal labour market, the implementing regulation of the international labour force law was amended. It allows foreigners under temporary protection and those with humanitarian residence permits to work under a work permit exemption, within the defined scope and duration. It also enables those under temporary protection to apply for a work permit exemption independently of a specific employer (see 2.1.1 Democracy). The number of issued work permits increased in 2024, but remains low given the large working age population among Syrian migrants. The vast majority of the Syrian refugees under temporary protection work in the informal sector.

The labour market develops positively with higher employment and lower unemployment rates, except for the structurally high gender employment gap. Türkiye only partially applies the EU recommendation on long term unemployment. See the *statistical annex and the section on the functioning of the labour market under 2.3 Economic criteria*.

On **social protection and inclusion**, the rate of persons at risk of poverty and social exclusion stood high at 30.4%. The rate of children at risk of poverty is high with 40.3%. Income inequalities also remained high, with the Gini coefficient being 44.8. Türkiye continues to lack a comprehensive poverty reduction strategy and a minimum income scheme, yet several social assistance mechanisms are in place targeting various vulnerable groups. The impact of social transfers on poverty reduction is low at 11.9% (EU 34.15%). Affordable social housing programmes need to be enhanced, as home ownership is declining and housing costs have dramatically increased. Transition from institutional to community-based care for vulnerable children is continuing, including development of an emergency foster care system. Affordable community-based care options need to be expanded for older people and persons with disabilities. Türkiye nominated a national Contact Point for the European Child Guarantee.

Türkiye made no improvement in **non-discrimination in employment and social policies**, including as regards alignment with the Employment Equality Directive and the Racial Equality Directive. The country still lacks an enforcement strategy and laws protecting against discrimination on the grounds of sexual orientation and gender identity. Further efforts are needed to implement the principle of reasonable accommodation for persons with disabilities.

On **equality between women and men in employment and social policy**, the gender employment gap in the labour market, despite a slight decline, is almost four times higher than EU average. The increase in educational attainment for women has not yet translated into a higher degree of gender parity in economic life. With only 36.6 per cent (compared with the male rate of 72) Türkiye has one of the lowest female labour force participation rates among OECD countries. The rate of women experiencing unregistered employment increased to 32.9%. The gender pay gap for earnings increased to 7.8%, which is below the rate of the EU (12%). It reached 20% for high school graduates. Türkiye has officially joined the Equal Pay International Coalition (EPIC) in January 2025. Employment support for women continued to be implemented by İŞKUR, but its impact remained limited given the large working age population of women. The law on part-time leave for civil servants following childbirth or adoption was adopted on 17 July 2025. It allows both parents to work half of the normal weekly working hours until their child reaches primary school age. The legislation is not yet fully aligned with the Directive on work-life balance for parents and carers and the Directive on equal opportunities and treatment of women and men in employment and occupation. There has been no notable development in availability of affordable care services. Gender-based stereotypes, gender bias in caring responsibilities and insufficient availability of affordable care services continued to hinder a higher women’s employment rate. Women continued to face a higher risk of poverty or social exclusion than men in all age groups. In March 2025, a presidential circular on prevention of psychological harassment in workplaces was released, but further action is needed to prevent and eliminate all types of violence and harassment at work, in accordance with Convention 190 of the International Labour Organization. The share of women in decision-making positions remained very low (see *Chapter 23 – Judiciary and fundamental rights*). Measures including steps to align the legislation with the EU Directive on Gender Balance on Corporate Boards need to be adopted.

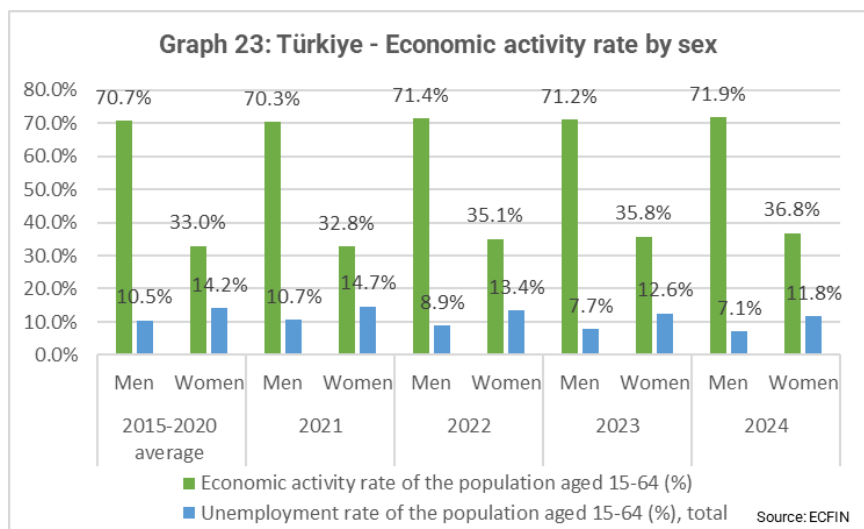
The good level of preparation for the participation in the **European Social Fund** was maintained. (See also *Chapter 22 – Regional policy and coordination of structural instruments*).

## Chapter 20: Enterprise and industrial policy

*EU industrial policy strengthens competitiveness, facilitates structural change and encourages a business-friendly environment that stimulates small and medium-sized enterprises (SMEs).*

On **industrial policy**, Türkiye adopted the ‘2030 Industry and Technology

Strategy’ (ITS) in March 2025. The strategy added green and digital transition initiatives and strengthened efforts towards technological and industrial independence. However, consultation of industrial stakeholders for the design of this strategy was not completely transparent, and the ITS lacks a system of comparable impact indicators. The Ministry of Industry and Technology is responsible for reporting every six months, with the involvement



of some selected stakeholders, but no publication of progress reports or external evaluation has been envisaged. A new action plan for the Improvement of Investment Environment was adopted in July 2025, including measures on data protection, improving the functioning of judiciary, compliance with international standards on public procurement and actions on green and digital transition. Türkiye kept the scope of the 15% domestic price advantage in public procurement. Its use has further increased in terms of financial volume and number of procurement exercises (see *Chapter 5 – Public procurement*), even though this is against EU industrial policy principles and ineffective in contrast to improving the innovation performance. Outcomes of the current action plan for the fight against the informal economy (2023-2025) are yet to be published. Türkiye revised its SME definition in August 2025 by increasing the financial threshold for annual turnover or balance sheet for medium-sized companies from TRY 500 million to TRY 1 billion.

On **enterprise policy and instruments**, Turkish legislation is still not fully harmonised with the Late Payment Directive. The Project Based Investment Programme (PBIP) for large-scale investments was maintained. Türkiye revised its incentive scheme framework in May 2025 repealing the 2012 incentive scheme. This new scheme is a multi-layered framework focusing on four priority objectives: boosting domestic production, fostering technological advancement, addressing regional development disparities, and promoting the green and digital transformation. Türkiye also continued to implement various schemes supporting companies, particularly small and medium-sized ones. The breakdown of State aid for investments made under the industry support programmes was not disclosed, contrary to the commitments made under the Customs Union between the EU and Türkiye (see *Chapter 8 – Competition policy*).

Türkiye continued to implement the Small Business Act framework and is participating in the new cycle of SME Policy Index by the OECD, funded by the EU. The SME support administration (KOSGEB) continued to run a range of technical assistance and financing schemes. The Ministry of Industry and Technology published the impact evaluations for 20 support schemes, including those of KOSGEB and the Turkish Scientific and Technological Research Institution (TÜBİTAK). A Presidency decision was issued on priority sectors for KOSGEB support, identifying manufacturing industry as a top priority in all sectors.

Türkiye participates in the SME pillar of the single market programme. Country data compiled as of April 2025 confirms that Türkiye has been successful in submitting proposals and receiving grants under the SME pillar. 10 SME pillar project proposals involving Turkish organisations have been accepted in response to different calls.

On **sectoral policies**, no new sectoral strategy was adopted during the reporting period (as of April 2025). Türkiye issued a cybersecurity strategy (see *Chapter 10 – Digital transformation and media*) and regional development national strategy during the reporting period with implications for industry. The Ministry of Environment, Urbanisation and Climate Change adopted a regulation on industrial emissions introducing green transformation certificates for enterprises compliant with the rules of the regulation.

## **Chapter 25: Science and research**

*The EU provides significant support for research and innovation. All Member States can participate in the EU's research and innovation programmes and benefit from them, especially where there is scientific excellence and solid investment in research and innovation.*

On **research and innovation**, the positive trend of Türkiye's performance in Horizon Europe continued. Türkiye's participation in the Innovation Pillar of Horizon Europe remains weak, except in the European Institute of Innovation and Technology (EIT) where Türkiye has

emerged as a dynamic participant in EIT initiatives. It is worth mentioning the operational launch of the EIT Community Hub in the first quarter of 2025 aiming to strengthen the existing collaboration with EIT and the participation of Turkish innovators in EIT schemes.

On the policy side, Türkiye announced ambitious targets in its new Industry and Technology Strategy for 2030 such as increasing R&D spending to 3% of GDP and expanding R&D personnel to 500 000 by 2030. Targets outlined in the Industry and Technology Strategy for 2023 were partially met. While the targets for high-technology product exports and full-time equivalent R&D personnel are nearly achieved, Türkiye has fallen short of the target for R&D expenditure as a share of GDP. After a slight decline in 2022, the share of R&D expenditure in GDP resumed its upward trend, reaching 1.42% in 2023 according to OECD data. However, the gap with the EU average of 2.24% remains significant.

Türkiye has initiated the design of Smart Specialisation Strategies in three pilot regions (West Mediterranean, Eastern Anatolia and Ahiler) with the aim of spreading the process to the rest of the country. So far there has been significant progress in identifying areas of competitive advantage and supporting innovation and entrepreneurship. With continued support, Türkiye can leverage smart specialization to drive economic growth, innovation, and regional development.

Despite a programme to reverse brain drain, official statistics show a steady increase of brain drain among higher education graduates since 2015, in particular in the fields of ICT, molecular biology, and engineering. This could potentially have a significant negative impact on science and technology in Türkiye.

According to the European innovation scoreboard 2025, Türkiye is regarded as an emerging innovator, performing at 58% of the EU average. The innovation gap between Türkiye and the EU is narrowing.

## Chapter 26: Education and culture

*The EU supports cooperation in education and culture through funding programmes and the coordination of Member State policy through the 'open method of coordination'. The EU and the Member States must also prevent discrimination and ensure quality education for children of migrant workers, including those from disadvantaged backgrounds.*

On **education and training**, the proportion of the total public education budget in GDP increased to 3.93% in 2024, below the EU average of 4.6% of GDP. The share of the total education budget in the consolidated government budget amounted to 14.6% in 2024.

Despite a 34.7% growth in early childhood education (ECE) capacity over the past decade, Türkiye's enrolment rate remains below the OECD average. The net enrolment rate for preschool education at age 5 has reached 84.26% in 2024, while the combined net enrolment rate for Turkish children aged 3–5 is at 51.89%. Among refugee children, the pre-primary gross enrolment rate for age 5 is much lower and stands at 44.48%. More than half of disadvantaged children miss ECE or attend for less than a year, compared with only 14% of children from advantaged backgrounds. Cost-effective and quality ECE services need to be expanded through multiple delivery models, including at municipal level.

The net enrolment rate in 2023-2024 in primary school and lower secondary school increased and reached respectively 95.03% and 91.45%. In secondary education, the net enrolment rate declined considerably, reaching 87.97%. There has been also a significant decline in the enrolment rate in higher education from 46.02% to 42.72%.

Türkiye took part in the Teaching and Learning International Survey (TALIS 2024). Türkiye is participating to PISA 2025 and has enrolled to join Trends in International Mathematics and Science Study (TIMSS) 2027.

On vocational education and training (VET), the implementation of the National Vocational Qualifications System by the Vocational Qualifications Authority is ongoing. The number of national occupational standards and approved qualifications slightly rose, whereas the number of authorised certification bodies declined, with five authorisations cancelled. There was an increase in the number of individuals who took exams and had their skills tested by these certification bodies.

Despite the Turkish Qualifications Framework being operational, the vocational training provided by VET institutions remains mismatched with the needs of national qualification candidates. To improve the functioning of the framework, other vocational educational institutions, such as continuous education centres of universities, public education centres of the Ministry of National Education and private vocational education centres need to be involved. It includes preparation of modular vocational training courses for certain occupations according to the expected national qualification learning outcomes, in cooperation with the relevant authorised certification bodies and considering the need to avoid conflict of interest.

In 2025, Türkiye updated referencing of the national qualifications framework to the European Qualifications Framework (EQF).

Türkiye is a member of the European Alliance for Apprenticeships (EAfA) and should encourage regional and local stakeholders to join the network.

On **higher education**, Türkiye remains at an advanced stage of implementing the Bologna process, although significant quality differences persist among Türkiye's 208 higher education institutions. According to the 2024 Bologna Process implementation report, Türkiye still needs to work on the full implementation of the key commitments, especially regarding degree structures, where some programmes exist outside the agreed Bologna model. The Turkish Higher Education Quality Council, which is a member of the European Association for Quality Assurance in Higher Education (ENQA) board, is awaiting a renewal of its ENQA membership and the European Quality Assurance Register for Higher Education (EQAR) registration. Five universities from Türkiye participate in European Universities alliances. According to the report on Scholar at Risk published in October 2024, Türkiye now ranks in the bottom 10% of states worldwide for respect for academic freedom. In July 2025, Türkiye adopted a law reaffirming the president's sole prerogative to appoint rectors of both public and foundation universities. This raises concerns in terms of university autonomy in Türkiye.

The number of students in special education and related institutions increased in 2023-2024. Among these students, 76.2% attend mainstream classes, and the remaining are in special education institutions or in special education classes across different levels. Inclusive education rates amount to more than 70% in primary and upper-secondary education. Despite progress, segregation remains significant, with nearly 50 000 children studying in separate classrooms and over 50 000 in separate schools. There is no significant difference in education enrolment rate between girls and boys, although in some regions, the drop-out rate is higher for girls. Girls with disabilities face lower access to education than boys, due to perceived financial burdens, higher risk of violence, and being kept at home post-puberty for safety reasons. Children with disabilities are also more likely to drop out at secondary level as many schools are not physically accessible. Refugee

children with disabilities face additional barriers, such as language challenges and social stigma.

As an associated country, interest in the Erasmus+ programme in Türkiye continues to rise. In 2024, Turkish organisations participated in 2 675 Erasmus+ projects. Türkiye is participating in all the European Education Area working groups 2021-2025.

In the field of **youth** policy, youth services are diversifying, besides increased number of youth centres, offices and mobility camps run by the government. Türkiye is in the process of updating its national youth policy document, which dates to 2011. Democratic participatory mechanisms for youth remain limited. Go-For, a solid rights-based umbrella youth network, which takes part in the European Youth Forum, is still not recognised by the government. In parallel, the Ministry of Youth and Sports has initiated preparatory work to establish a National Youth Council. Unjustified, excessive and prolonged pre-trial detention for young students during protests in spring 2025 raises concerns about political participation opportunities of youth in Türkiye. The budget of awarded European Solidarity Corps applications reached EUR 5.6 million, while their number saw a minor decline in 2024.

In the field of **sports**, Türkiye has no national sport strategy. It continues to take part in the European Week of Sport.

In the area of **culture**, despite significant resources allocated to cultural activities at central and local level, the impediments to development of systematic, consistent and sustainable cultural policies persist. The cultural policy in Türkiye remains centralised, with limited space for independent stakeholders and critical expression. The Ministry of Culture and Tourism continued promoting state-led large events, while transparent participation and cultural diversity were often sidelined. The share of the central budget managed by the ministry is less than 0.36% and illustrates the marginal place of culture in national priorities. Several metropolitan municipalities across Türkiye have increasingly engaged in supporting literature, performing arts, and participatory heritage initiatives, aiming to improve cultural access, local identity, and civic engagement. Political interventions and arbitrary bans of cultural events continued in the reporting period. The country is not participating in the Creative Europe programme.

## Chapter 29: Customs Union

*All Member States are part of the EU Customs Union and follow the same customs rules and procedures. This requires legislative alignment as well as adequate implementing and enforcement capacity, and access to and interoperability with the EU electronic customs environment.*

Türkiye made no advancements on **customs legislation**. Türkiye continued to apply additional duties on a large number of products originating in non-EU countries, which are in free circulation in the EU-Turkey Customs Union.

Türkiye's application of value-based import surveillance measures remains inconsistent with the principles of transparent, objective, and verifiable customs valuation procedures. In addition, the lack of a legal mechanism to recover overpaid duties resulting from the application of the value-based surveillance is not in line with the EU *acquis*. Export tax measures on hides, skins, and wet-blue leathers remain in place. A draft Turkish customs law harmonised with the Union Customs Code has yet to be finalised. Furthermore, regulations concerning free zones and duty relief regime remain not fully aligned with the EU *acquis*.

In line with the rules on mutual administrative assistance in customs matters under Annex 7 to Association Council Decision No 1/95, Türkiye should continue its cooperation with the

EU to ensure that customs legislation is correctly applied, in particular by the prevention, detection and investigation of operations in breach of that legislation. As part of the anti-fraud efforts, it is recommended that Türkiye strengthens combating customs fraud, in particular the smuggling of tobacco products and its cooperation with the European Anti-Fraud Office (OLAF).

On **administrative and operational capacity**, efforts continued to strengthen customs enforcement capacity for border controls, particularly on anti-smuggling operations. However, full alignment with the EU *acquis* on the customs enforcement of intellectual property rights and in particular on export and in-transit operations is yet to be completed. Risk-based controls to enforce safety and security measures need to be streamlined in line with the EU *acquis*. Türkiye implements the New Computerised Transit System (NCTS) updated in phase 5 as part of its membership in the Convention on a Common Transit Procedure. Tariff IT systems are still operating in line with the EU tariff IT systems. Türkiye needs to implement the IT strategy in line with business initiatives and update the documented customs business processes in line with the legal basis.

#### CLUSTER 4: THE GREEN AGENDA AND SUSTAINABLE CONNECTIVITY

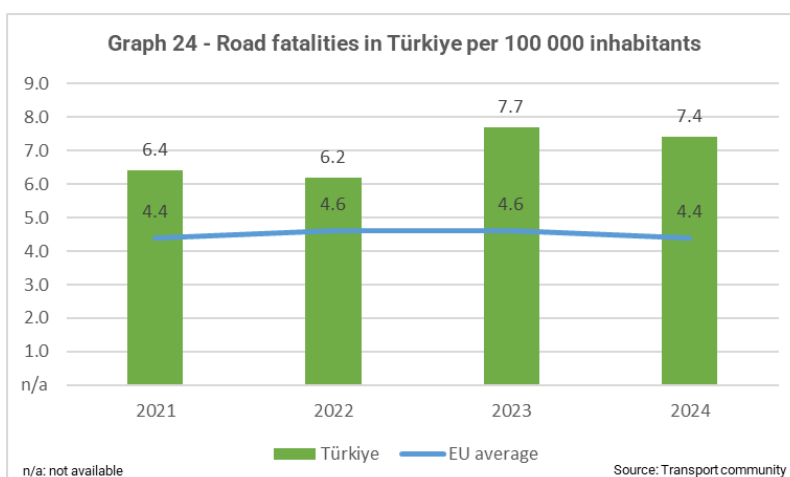
This cluster covers: transport policy (Chapter 14), energy (Chapter 15), trans-European networks (Chapter 21) and environment and climate change (Chapter 27).

##### Chapter 14: Transport policy

*The EU has common rules for technical and safety standards, security, social standards, and market liberalisation in road transport, railways, inland waterways, multimodal transport, aviation and maritime transport.*

Regarding the EU *acquis* on **general transport**, Türkiye has yet to adopt a White Paper on Sustainable Urban Mobility. Türkiye continued working on decarbonisation pathways based on an emission projection model.

On **road transport**, Türkiye adopted a regulation on motor courier services bringing in vocational standards and a regulation on transport of perishable foodstuffs, aiming at compliance with the International Carriage of Perishable Foodstuffs Agreement. Alignment gaps still remain on access to the profession and market, licensing, accessibility,



certificates for professional competence training, road safety management (especially road infrastructure and tunnels), roadworthiness testing, rest time enforcement, alternative fuels infrastructure deployment, and emission targets for heavy-duty vehicles. On road safety, according to the Turkish Statistics Institute, the total number of crashes increased by 9.9%, the number of crashes with death or injury increased by 13.5%, the number of accidents with equipment damage increased by 9.1%, and the number of injured increased by 9.8%.



On **rail transport**, dangerous goods transport regulations were updated for railway operations, aligning partly with the 2025 standards set by the Regulation concerning the International Carriage of Dangerous Goods by Rail. The new railway framework law is not yet adopted, and Türkiye has still not aligned with the EU's fourth railway package. The railway safety and the interoperability regulations are not yet aligned with the EU *acquis*. Further training on railway safety is needed. The independence of the National Safety Authority, currently assigned to the DG for Railway Transport Services, has yet to be achieved. The subsidies to the incumbent railway operator and the financial independence of the transport operator from infrastructure manager remain major issues. There are still gaps in alignment requiring further efforts on regulatory independence (Directive 2012/34/EU), safety certification (Directive (EU) 2016/798), train driver certification, cost calculation modalities, public service contract regulation, and passenger rights.

On **maritime transport**, Türkiye introduced a domestically produced navigational text messages system which started transmitting maritime safety information, navigation warnings, weather forecasts, and other essential updates to ships at sea. National legislation implementing the EU Port Services Regulation is yet to be developed.

Türkiye continues to prohibit the docking of vessels flying Cypriot flag calling at Turkish ports as well as ban all vessels with cargo bound for or coming from Cyprus from calling at Turkish ports.

Türkiye has yet to align with the relevant EU legislation on **inland waterway**.

On **aviation**, Türkiye has not yet adopted national legislation on sustainable aviation fuel, and the timeline for its adoption and implementation remains unclear. Türkiye opened the 58<sup>th</sup> international airport of the country in Cukurova.

The lack of adequate communication between air traffic control centres in Türkiye and Cyprus continued to compromise air safety in the Nicosia flight information region, requiring an operational solution. Türkiye continued not to accept the principle of EU carrier designation in its air services agreements with Member States, which is a cornerstone of the EU internal market in aviation.

On **multimodal transport**, further legislative work is required to align with the Combined Transport Directive and regulatory facilitation measures.

As regards alignment on EU passenger rights regulations Türkiye, introduced compensation for delays of three hours or more in its legislation.

As long as restrictions remain in place on vessels and aircrafts registered in Cyprus, related to Cyprus, or whose last port of call was Cyprus, Türkiye will not be in a position to fully implement the EU *acquis* relating to this chapter.

## Chapter 15: Energy

*EU energy policy covers energy supply, infrastructure, the internal energy market, consumers, renewable energy, energy efficiency, nuclear energy, nuclear safety, radiation protection and nuclear safeguards.*

On **security of supply**, in 2024 Türkiye became the second largest country in Europe, after Spain, in terms of LNG regasification capacity, reaching 51.3 billion cubic metres. Türkiye continued to invest in enhancing its regional natural gas trading role capitalising on its geographical location and increased natural gas infrastructure capacity. A long-term agreement with Algeria was extended until 2027 while new LNG supply agreements were reached with major players in September 2024. In February 2025, BOTAŞ and Turkmengaz signed an agreement for the transportation of 1.3 billion cubic metres of Turkmen natural

gas to Türkiye via a swap agreement with Iran. In March 2025, Türkiye inaugurated the Igdir-Nakhchivan natural gas pipeline, which is a new 85 km gas pipeline with a 500 million cubic metres' annual capacity. BOTAŞ and the national Egyptian gas company signed an agreement in May 2025 enabling a floating storage and regasification unit from BOTAŞ's fleet to operate abroad for the first time. Türkiye improved upstream operations at the Sakarya gas field in the Black Sea, completing the first phase of gas production, which at the end of April 2025 reached 9.5 million cubic metres per day. The construction works at the country's biggest underground storage facility at Tuz Golu (Salt Lake) continued and the second underground gas storage facility at Silivri was expanded. No developments were reported on legislative alignment with the EU *acquis* in this area. Overall, despite some diversification efforts, energy dependence on Russia continued.

On the **internal energy market**, Türkiye suspended yet again the unbundling of the state-owned gas company BOTAŞ, which dominates the country's natural gas market and trade. The natural gas market law remained incompatible with the EU's Third Energy Package and the pricing is not yet transparent, cost-reflective and non-discriminatory.

On the **wholesale electricity market**, as of January 2025, subsidies to electricity were removed beyond 5 000 kWh per year for consumers and beyond 15 000 kWh per year for industrial users. Türkiye's electricity generation installed capacity continued increasing, and as of March 2025, reached 117 876 MW. Clean energy sources accounted for around 70 000 MW of the total capacity.

The share of fossil fuels is at the historic low level of 55%, with gas generation reaching only 18.5% also due to increase hydropower generation and increasing electricity demand. Combined wind and solar energy generated (62 TWh) more electricity than domestic coal for the second year in a row.

On **hydrocarbons**, Türkiye is yet to align its legislation with the Directive on the safety of offshore oil and gas operations, also regarding the transit of hydrocarbons. Türkiye allocated TRY 75.7 billion to the energy sector in 2025 under its latest investment programme, which meant a 70% increase compared with 2024. Daily oil production in Türkiye continued to increase. Türkiye signed a four-year venture with US-based companies to explore for shale oil and gas in four fields in the Diyarbakir basins.

On **coal**, Türkiye continued to provide incentives for domestic production of lignite coal and the contribution of imported coal, including from Russia to energy generation remained significant at about 20%. Türkiye has yet to set specific date for a coal phase-out and reduce the envisaged capacity for the coal-fired power generation in Türkiye for the next decade.

On **renewable energy**, the share of renewable sources in installed power continues increasing from 56% in 2023 to 60.06% in 2024, and in production, from 42% in 2023 to 53% in 2024. Out of 59.2 GW of electricity generated from renewable sources in Türkiye in 2024, 32 GW came from hydropower, 11.8 GW from wind, 11.3 GW from photovoltaics and the rest from geothermal and bioenergy. An energy transition roadmap to 2035 was adopted, where a 120 GW target of cumulative solar and wind installed capacity was announced. A target was set to increase the share of domestic resources in electricity generation to 63% by 2028 as part of its 2024-2028 Strategic Plan.

In 2024, a new round of the Renewable Energy Auctions (YEKA) was launched for 1.2 GW of wind and 800 MW of solar photovoltaic. However, the local content requirement practices in Türkiye continue raising concerns as they contradict World Trade Organization and EU-Turkey Customs Union rules and undermine the competitiveness of the EU and other international companies on the Turkish energy market.

The Turkish long-term climate strategy released in 2024 also sets targets for battery storage capacity in 2030 and 2035 of 2.1 GW and 7.5 GW respectively.

As regards **energy efficiency**, no developments were reported, including in the area of energy performance of buildings.

On **nuclear energy, nuclear safety and radiation protection**, the commissioning of the first reactor of Türkiye's first nuclear power plant at Akkuyu on the Mediterranean Sea (a 99.2% investment by Russia's Rosatom) was further delayed and is not yet operational. The construction of the second, third and fourth reactors at Akkuyu power plant continued.

Following its voluntary commitment to conduct EU/ENSREG methodology-based post-Fukushima nuclear safety stress tests on the Akkuyu power plant, a peer review report from the European Nuclear Safety Regulators Group (ENSREG) containing a number of recommendations was published. Türkiye is not yet member of the European Community Urgent Radiological Information Exchange and continued refusing to accept its obligations to the Republic of Cyprus as a Contracting Party to the Joint Convention on the Safety of Agent Fuel Management and on the Safety of Radioactive Waste Management.

## Chapter 21: Trans-European networks

*The EU promotes trans-European networks (TENs) in the areas of transport, telecommunications and energy to strengthen the internal market and contribute to growth and employment.*

On **transport networks**, Türkiye continued to progress on the Halkali-Kapikule railway line in all of its stages. The project reached 95% physical progress in the Cerkezkoy – Kapikule section. Rail capacity on the eastern side of the Halkali to Kars corridor is yet very limited and requires improvement of infrastructure.

Increasing the capacity of the Yavuz Sultan Selim Bridge is crucial for seamless Bosphorus railway crossings. Substantial investment is needed to install rail infrastructure on the bridge and fully integrate it into the TEN-T. Completing this link would ensure uninterrupted freight and passenger rail flows between Europe and Asia, strengthening multimodal corridors. The 7th Railway Monitoring Board was convened in March 2025, reaffirming Türkiye's commitment to European standards for interoperability, network performance monitoring, and better coordination among stakeholders.

Increasing rail capacity in the Marmaray tunnel, the only functioning undersea rail connection across the Bosphorus, has become increasingly urgent. Marmaray currently experiences capacity constraints due to mixed passenger and freight use. Enhancing throughput is essential for accommodating projected volumes and ensuring a resilient and uninterrupted flow between the European and Asian TEN-T extensions.

The Kars-Tbilisi-Baku railway line saw initiatives for capacity expansion during the reporting period. This corridor provides an alternative east-west rail link connecting Türkiye, Georgia, and Azerbaijan and is an essential element enabling connections towards Central Asia. The Ankara-İzmir High-Speed Rail project continued construction, enhancing east-west connectivity within Türkiye. The Mersin-Adana-Gaziantep rail line construction progressed albeit slowly. This corridor is crucial for linking southern Turkish ports to the Middle Corridor and strengthening alternative east-west supply chains.

On **energy networks**, Türkiye has not yet fully aligned with the TEN-E Regulation. The integration of increased amounts of intermittent renewable energy remains a major challenge in modernising the country's electricity network.

## Chapter 27: Environment and climate change

*The EU promotes strong climate action, sustainable development and protection of the environment. EU rules contain provisions addressing climate change, water and air quality, waste management, nature protection, industrial pollution, chemicals, noise and civil protection.*

### Environment

On **horizontal legislation**, Türkiye has yet to become party to the Espoo Convention is recommended to fully align with Environmental Impact Assessment and Strategic Environmental Assessment Directives. Türkiye is not yet party Aarhus Convention and difficulties persist in accessing public information, justice in environmental matters, and public participation in decision-making. Further regulatory work remains necessary to align with the Environmental Liability Directive and the Environmental Crime Directive.

On **air quality**, Türkiye has yet to adopt national legislation in line with the revised EU Directives on Ambient Air Quality and a National Emission Ceilings legislation. Reports on severe air pollution in some cities continued. Measurement results for PM 2.5 are not yet publicly available and the threshold values for most parameters remain higher than the EU limit values.

On **waste management**, Türkiye's recycling rate increased from 30% to 36% in the reporting period, the deposit management system principles were published in January 2025, and implementation was initiated in one pilot province (Sakarya). The level of implementation of waste management plans at local and regional level is however still insufficient. Türkiye has yet to adopt the legislation on ship recycling to mirror the requirements of the EU Ship Recycling Regulation. Türkiye has not yet adopted a national circular economy action plan, and the management of construction debris remains a major environmental problem.

On **water quality**, no advancements were made on aligning with the revised EU Directive on drinking water. The coverage of the 1 258 wastewater treatment plants remains at 91% of the municipal population. Alignment with the EU marine strategy remains pending.

Further work remains necessary on **nature protection** Türkiye has not yet set national targets to implement the Kunming-Montreal Global Biodiversity Framework and has not yet adopted the framework legislation, the national biodiversity strategy and the action plan. Türkiye signed but did not ratify the Agreement under the United Nations Convention on the Law of the Sea on the conservation and sustainable use of marine biological diversity of areas beyond national jurisdiction (BBNJ Agreement). Further alignment with the EU *acquis* is required for the planning and construction in wetlands, forests and natural sites. The implementation of the mining regulation, allowing mining in agricultural areas, protected areas, national parks and coastal areas, remained a concern among non-governmental organisations and the general public.

On **industrial pollution and risk management**, while Türkiye adopted implementing legislation in January 2025, this is yet partially aligned with the EU's Industrial Emissions Directive, and further work is required, especially concerning the permit system.

On **chemicals**, alignment with the EU legislation on registration, evaluation, authorisation and restriction of chemicals (REACH) is yet to be achieved.

No improvements were made on **noise**, where the level of alignment and implementation remains high.

On **civil protection**, Türkiye continued its participation in the relevant activities under the Union Civil Protection Mechanism. Türkiye also contributed to the EU Civil Protection Pool

and rescEU reserve with its capacities for response to earthquakes and medical emergencies. The establishment of a Secure Trans-European Services for Telematics between Administrations, not yet in place, remains a precondition for connecting to the Common Emergency Communication and Information System.

### Climate change

While the country's level of climate ambition still does not align with the EU's, Türkiye made improvements on climate change over the reporting period. In November 2024 Türkiye adopted its long-term climate strategy in line with the Paris Agreement but it has not yet released detailed, model-based scenarios to align short- and medium-term measures with its long-term goal of reaching climate-neutrality by 2053. In July 2025, Türkiye adopted a climate law including the rules for the establishment of a domestic emission trading system. While this is a crucial step for the introduction of a carbon price, the law is still only partially aligned with the EU *acquis*.

Türkiye does not fully implement the Fuel Quality Directive, nor does it align with EU emissions standards for new light and heavy-duty vehicles. Türkiye is not aligned with the EU Carbon Capture and Storage Directive. In October 2024, Türkiye published a regulation implementing the Kigali Amendment to the Montreal Protocol on ozone-depleting substances, improving its alignment with EU standards on ozone-depleting substances and on fluorinated greenhouse gases although alignment is still not complete and requires further work in particular on sectoral restrictions and the ambition of the quota system.

The submission of a new Nationally Determined Contribution (NDC) ahead of UNFCCC COP30 with an increased level of ambition in line with the efforts to limit global warming to 1.5°C, especially an absolute emission reduction target, remains crucial.

## **CLUSTER 5: RESOURCES, AGRICULTURE AND COHESION**

This cluster covers: agriculture and rural development (Chapter 11), food safety, veterinary and phytosanitary policy (Chapter 12), fisheries and aquaculture (Chapter 13), regional policy and coordination of structural instruments (Chapter 22), and financial and budgetary provisions (Chapter 33).

### **Chapter 11: Agriculture and rural development**

*The EU's common agricultural policy supports farmers and ensures Europe's food security. It helps tackle climate change and the sustainable management of national resources; maintains rural areas and landscapes across the EU; and keeps the rural economy alive by promoting jobs in farming, agri-food industries and associated sectors. This requires strong management and control systems. There are also common EU rules for marketing standards, quality policy and organic farming.*

On **horizontal issues**, Türkiye took no significant steps to advance on sustainable agriculture under the Turkish Green Deal action plan. Türkiye continued to move away from the principles governing support under the EU's common agricultural policy. There were no developments as regards the establishment of the integrated administration and control system.

There were no developments on **agricultural markets – common market organisation**. The effective opening and filling of the preferential quotas for beef and live bovine animals under the trade agreement with the EU remains untransparent.

On **rural development**, Türkiye has increased the national contribution to the EU Instrument for Pre-accession Assistance for Rural Development (IPARD III). Seven calls for applications were launched under this programme, with a continuous high number of applications submitted exceeding the available budget. IPARD II implementation has ended with a nearly full absorption rate.

On **quality policy**, alignment with the EU *acquis* needs to continue.

On **organic farming**, there was no developments in aligning with the EU *acquis*.

On the **fight against corruption measures**, the IPARD bodies are obliged to prevent, detect and report irregularities.

## **Chapter 12: Food safety, veterinary and phytosanitary policy**

*The EU food acquis including hygiene rules for foodstuff production ensures a high level of food and feed safety and a high level of protection of consumers' interests. Animal health and welfare and the safety of food of animal origin are safeguarded together with quality of seeds, plant reproductive material, protection against harmful organisms and animal nutrition and the use of plant protection products.*

On **general food safety**, the number of notifications to the rapid alert system for food and feed on pesticide residues in fruits and vegetables as well as contaminants in dried figs, pistachios, herbs and spices imported from Türkiye into the EU remains high. Following the approval of six poultry slaughterhouses by the EU, Türkiye started exporting heat-treated poultry products to the EU.

On **veterinary policy** there is still no progress on identification and registration of swine animals, and on identification of cattle and small ruminants. Lack of enforcement continued on animal welfare, where rules on slaughterhouses, long journeys and the transition to enriched cage systems are still not implemented. The implementation of compulsory requirements for controlling animals, meeting their feed and water requirements, sheltering and resting needs during transport was once more extended until December 2026. While Türkiye adopted an implementing regulation on the protection of animals in December 2024, the rules regarding the use of euthanasia created controversy in the country. Animal health legislation in Türkiye is not yet aligned with the EU's animal health policy and *acquis*.

On the **placing of food, feed and animal by-products on the market**, there are still problems on raw milk quality as the strategy on raw milk is not yet adopted and the general rules to be implemented by raw milk producers are not yet in place. Raw milk specifications and rules on the use of milk that does not meet the somatic cell criteria remained unadopted. Further work is required to align Türkiye's rules on funding inspections with the EU system. An EU compliant system of collection, storage and processing of animal by-products is not yet in place.

While Türkiye continued efforts on its **food safety rules** and its **specific rules for feed**, no progress was reported.

On **phytosanitary policy**, Türkiye adopted a regulation concerning the registration of plant varieties in September 2024 aiming at determining the principles regarding the registration of varieties of agricultural plant species. No progress on plant health law was reported.

Türkiye has yet to align its legislation on novel food and on **genetically modified organisms**.

## **Chapter 13: Fisheries and aquaculture**

*The common fisheries policy lays down rules on fisheries management, protects living resources of the sea and limits the environmental impact of fisheries. This includes setting*

*catch quotas, managing fleet capacity, rules on markets and aquaculture and support for fisheries and coastal communities. Further, it promotes a sustainable aquaculture.*

Türkiye made some progress on **resource and fleet management**. Following the first year of implementation of the regulation on planning of agriculture production – which also includes fisheries and aquaculture – further actions were taken through regulating commercial fisheries and regulating recreational fisheries. The legislation included catch limits for ecologically and economically important species, mesh size restrictions, depth limits, fisheries closed areas, and species-specific bans. Specific measures were also adopted to protect vulnerable species, such as seabirds and sea turtles. Türkiye continued working towards the operationalisation of the General Fisheries Commission for the Mediterranean's (GFCM) non-indigenous species observatory for the Eastern Mediterranean.

On **inspections and control**, Türkiye made some progress on legislative alignment and implementation of binding control measures recommended by the International Commission for the Conservation of Atlantic Tunas and the GFCM. Monitoring, surveillance and control capacities were further strengthened with the establishment of a new fisheries inspection centre, and traceability systems.

The amended fisheries law provided for some **structural action** and a stronger conservation regime, such as improved fishing monitoring, control and surveillance systems and new penalties that increased the number of vessels confiscated due to illegal, unreported and unregulated fishing. Further measures were put in place during the reporting period to support small-scale fisheries and women in fisheries. National data collection was also improved: catch data/landings, fleet activity records and economic indicators were regularly collected and used for fisheries management.

On **market policy**, IT tools were set up to support the development and control of professional organisations in line with EU market policy. Türkiye continued providing **State aid** for aquaculture and improved data quality on marine and inland artisanal fishing vessels.

There was no significant development concerning **aquaculture**.

On **international agreements**, Türkiye kept cooperating with the EU in regional and international platforms. Türkiye participated with an active and supportive stance in the works of the GFCM. However, it has not ratified yet the United Nations Convention on the Law of the Sea, which would improve cooperation with the EU on fisheries and maritime policy.

## **Chapter 22: Regional policy and the coordination of structural instruments**

*Regional policy is the EU's main tool for reducing regional disparities and investing in sustainable and inclusive socio-economic growth. It is operating through "shared management" between the Commission and EU Member States. The implementation of cohesion policy programmes requires appropriate administrative capacity on programme and project level, the establishment of systems of sound financial management and control and also the fulfilment of other EU acquis elements such as environmental or public procurement legislation.*

There were no improvements on the **legislative framework**. Türkiye has not put in place mechanisms for evidence-based policymaking, policy and programme evaluations, and impact assessment. Türkiye needs a comprehensive reform agenda for public administration and public finance management addressing the lack of accountability at higher levels of public administration, as well as mechanisms for evidence-based policymaking, policy and programme evaluations, and impact assessment. The autonomy of

local governance is not upheld. State overregulation and interventionism in planning decisions of local authorities persists.

There is a need to improve the overall framework and statistical tools for monitoring and evaluation of the National Strategy for Regional Development and Regional Development Agencies' performance, along with enhancing implementation tools.

On the **institutional framework**, some improvements are observed in the supervision and intervention capacity of the National Authorising Officer in contracting and implementation of IPA funding. The role of the National IPA Coordinator (NIPAC) requires strengthening to ensure effective coordination amongst ministries, prioritisation of interventions under IPA III and monitoring of results. The institutional set-up and the system for management of IPA funds under indirect management by the beneficiary country has been adapted to the IPA III requirements.

Efforts continue to improve **administrative capacities** for programming, monitoring and evaluation activities, as well as to strengthen the Audit Authority. However, clear staff retention policy and strategy in the IPA structures are still lacking. Recruitment procedures for the most senior civil service posts lack objective selection criteria. The capacities of the indirect management by beneficiary country (IMBC) structures need to be further strengthened in order to ensure efficient and timely contracting and implementation of IPA programmes. The project management capacities should also be enhanced to enable sound financial management and put more emphasis on performance aspects in addition to compliance.

On **programming**, the NIPAC continued to coordinate the process and ensured overall monitoring and evaluation of the implementation. Although Türkiye continues to gain experience in programming in regional policy and implementing some Interreg IPA programmes, it should address structural weaknesses in the regional policy implementation, ensure the proper functioning of local democracy and more balanced regional development. Implementation under IPA III should be accelerated.

On **monitoring and evaluation**, as part of the monitoring procedures applicable under the IMBC, results-oriented monitoring missions continued, and the NIPAC office submitted an evaluation plan for 2025 and 2026. Management Information Systems functions should be significantly improved to facilitate tracking of project and programme progress through output and result indicators and eventually facilitate the application of result-based management.

The IPA structures are equipped on **financial management, control and** although their implementation effectiveness needs to be improved, in particular in terms of use of performance indicators and adherence to sound financial management rules and practices. A countrywide management information system for risk management, internal control and monitoring and reporting of the financial management is in place. The audit work is carried out in accordance with internationally accepted audit standards as indicated in the Financial Framework Partnership Agreement and Framework Agreements.

On **fight against corruption**, Türkiye lacks a national anti-fraud strategy. The IMBC system has been addressing potential risks, detecting and combating fraud and irregularities. Türkiye needs to improve shortcomings concerning legal status, independence, charters, quality assurance and reporting lines of internal audit units of IPA III structures.

### **Chapter 33: Financial and budgetary provisions**

*This chapter covers the rules governing the funding of the EU budget ('own resources'). These resources mainly consist of: (i) contributions based on the gross national income of each*



Member State; (ii) customs duties; (iii) the non-recycled plastic resource and (iv) a resource based on value added tax. Member States must have the appropriate administrative capacity to adequately coordinate and ensure the correct calculation, collection, payment and control of own resources.

Türkiye has already established the fundamental principles and institutions in the underlying policy areas related to the implementation of the own resources system (see Chapters 16 – Taxation, 18 – Statistics, 29 – Customs Union, and 32 – Financial control). However, in due course, it will need to set up solid coordination structures, strengthen management capacity and adopt implementing rules for the effective administration of the own resources system. The Customs Union with the EU on processed agricultural goods and industrial goods (with the exception of coal and steel products) continues to ensure considerable alignment of Türkiye's customs legislation with the *acquis* on customs. Türkiye has yet to adopt a draft customs law aligned with the Union Customs Code. This will facilitate preparation in **traditional own resources** (mainly customs duties).

Systems to accurately calculate the VAT base and the weighted average rate for the **value added tax-based resource** are not in place yet. VAT and customs duties fraud remains an issue as does the size of the informal economy. Legislation on structure, exemptions, special schemes and the scope of reduced rates is not fully aligned with the EU *acquis*.

Concerning the **gross national income-based resource**, Türkiye has made efforts to fully align its national accounts and gross national income calculations with the European System of Accounts (ESA 2010). It also needs to improve the estimates' exhaustiveness to ensure that they take account of the non-observed economy. The gross national income inventory is not fully aligned with the Eurostat's Inventory Guide and the transmission of data does not always occur in a timely manner.

In terms of the **administrative infrastructure**, Türkiye needs to set up a fully operational coordination structure, with sufficient administrative capacity and the implementing rules needed to ensure that it can correctly calculate, forecast, account for, collect, pay, monitor and report own resources to the EU in line with the EU *acquis*.

## CLUSTER 6: EXTERNAL RELATIONS

There are two chapters in this cluster: external relations (Chapter 30), and foreign, security and defence policy (Chapter 31).

### Chapter 30: External relations

*The EU has a common trade and commercial policy towards third countries, based on multilateral and bilateral agreements, and autonomous measures. There are also EU rules on humanitarian aid and development policy.*

On the **common commercial policy** there was limited progress during the reporting period. Türkiye maintained the large scope of the additional duties diverting from the common external tariff and partial alignment with the EU's Generalised Scheme of Preferences in terms of beneficiary countries and products. Türkiye initiated one new safeguard investigation.

There is a need for closer coordination between the EU and Türkiye within the World Trade Organisation (WTO), in the OECD and in the G20. At the WTO, Türkiye has been an active participant in the Joint Initiative on Electronic Commerce discussions, but it has not yet expressed support for the outcome. While it has supported the renewal of the multilateral moratorium on customs duties on electronic transmissions, it continues to express

scepticism about the meaning and scope of the commitment. Türkiye (together with India and South Africa) blocks the consensus to adopt the request for legal incorporation of the Investment Facilitation for Development Agreement into the WTO rulebook. Türkiye did not join the Multi-party Interim Appeal Arbitration Arrangement (MPIA) either.

The work is progressing on the technical revision of the bridging legislation of the EU-Turkey Customs Union (Association Council Decision 1/2006) to align it with the new rules of the revised Pan-Euro-Mediterranean Convention. On export controls of military equipment and technology, and **dual-use goods**, Türkiye did not align with the EU position on certain multilateral export control arrangements. Türkiye's non-alignment with the EU's restrictive measures against Russia remains a concern, although it has taken practical steps to prevent the circumvention of EU sanctions against Russia on dual-use goods.

On **bilateral trade and investment agreements with third countries**, Türkiye has 84 bilateral investment treaties in force, 24 of which are with 25 EU Member States, and 23 free trade agreements. The Free Trade Agreement signed with Ukraine entered into force, but its implementation is suspended. Türkiye continued to implement its free trade agreements with Malaysia, Venezuela, the United Arab Emirates, and Qatar, diverging from the common commercial policy under the EU-Turkey Customs Union since the EU has no such agreements with those countries. In addition, Türkiye implemented preferential trade agreements with Iran, Uzbekistan, Pakistan and Azerbaijan.

As for **development policy** and **humanitarian aid**, Türkiye granted official development assistance in 2024 of EUR 6.87 billion (USD 7.48 billion), which is equivalent to 0.56% of its gross national income. It was below the 0.7% target enshrined in Sustainable Development Goal 17. The assistance was largely directed towards humanitarian support for projects related to Syria but carried out in Türkiye.

### Chapter 31: Foreign, security and defence policy

*Member States must be able to conduct political dialogue under EU foreign, security and defence policy, align with EU statements, take part in EU actions, and apply agreed sanctions and restrictive measures.*

The **political dialogue** between the EU and Türkiye on foreign and security policy issues intensified through contacts, meetings and bilateral visits at high- and senior officials' level. Several high-level visits took place. The President and the High Representative/Vice-President of the European Commission travelled to Ankara in December 2024 and January 2025 respectively. Türkiye actively engaged with EU Special Representatives on a range of regional issues (Horn of Africa, Central Asia, South Caucasus, Western Balkans, Gulf) and the EU-Türkiye consultations on Western Balkans took place in September 2025. The political dialogue at Political Directors' level took place in March 2025 after a hiatus of three years and informal consultations on Security and Defence resumed in June 2025 after a four-year pause. The EU Special Envoy for the implementation of EU sanctions visited Türkiye and engaged on circumvention of sanctions against Russia in April 2025. In March 2025, Türkiye attended the 9th Brussels Syria Conference organised by the EU. The Turkish Minister of Foreign Affairs participated in the informal meeting of the EU Ministers of Foreign Affairs (Gymnich) in Warsaw in May 2025, and in the Ministerial Meeting on Cross-Regional Security and Connectivity in Luxembourg in October 2025, held in the margins of the EU Foreign Affairs Council, where he also held a bilateral meeting with the HR/VP.

The institutional framework enabling Türkiye's participation in the **EU's common foreign and security policy (CFSP)** and **common security and defence policy (CSDP)** remained in place.

Regrettably, Türkiye maintained a very low alignment rate of 4% with the statements by the High Representative on behalf of the EU and Council decisions on sanctions as of 24 October 2025, compared with 6% in 2024.

Türkiye maintained its position of not supporting sanctions adopted outside the UN framework, but suspended trade with Israel for its actions against Palestinians. Türkiye refrained from aligning with the EU's **restrictive measures** against Russia in relation to Russia's war of aggression against Ukraine while emphasising that it did not want to become a platform for the circumvention of EU sanctions. Türkiye issued a guidance to financial institutions about the risks of non-compliance with G7 sanctions. Türkiye has engaged with the EU to address sanctions circumvention for the most sensitive goods and has banned the re-export of sanctioned goods transiting through its free trade zones/warehouses. In April 2025, Türkiye accepted to prevent the re-export of EU-origin economically critical goods to Russia. After having surged in the wake of Russia's war of aggression against Ukraine, Türkiye's direct export of common high priority list (CHPL) items to Russia dropped significantly in 2024, down to the pre-war volumes at the beginning of 2022. Türkiye took measures to prevent the direct re-export of CHPL items to Russia originating from the EU, US, UK and Japan. The EU and Türkiye continued their cooperation to prevent the 'false transit' of CHPL items, however Türkiye should step up work with relevant third countries to stop the false transit of CHPL items, which are declared as exports to Central Asia but ultimately reach Russia, and cooperate more actively with EU investigative authorities on cases of falsification of origin of Russian-origin sanctioned goods that are entering the single market illegally. The EU has warned Türkiye about the maritime and ecological risks associated with Russia's 'Shadow Fleet' and welcomes that Turkish authorities have been checking actively the insurance of vessels crossing through the Bosphorus.

Türkiye continued to operate flights to and from Russia. As of 1 September 2025, twenty-three Türkiye-based entities were listed under EU sanctions in the context of Russia's war of aggression against Ukraine.

Türkiye actively **engaged with international organisations**, including the UN and OCSE, while continuing to systematically obstruct the accession of the Republic of Cyprus in several organisations and arrangements. Türkiye applied for membership in BRICS+, but was offered a partner country status, which it rejected, and continued to play a pivotal role in the Organization of Turkic States (OTS) and an active role in the OIC (Organisation for Islamic Cooperation). Türkiye is not a State Party to major UN treaties, including the Rome Statute of the **International Criminal Court** and the UN Convention on the Law of the Sea (UNCLOS) as well as the Council of Europe's Istanbul Convention on preventing and combating violence against women and domestic violence from which Türkiye withdrew in 2021. Türkiye does not have a National Action Plan (NAP) for the implementation of UN Security Council Resolution 1325 on the Women, Peace and Security (WPS) agenda.

As regards **disarmament** and **non-proliferation**, Türkiye is a party to most international treaties and conventions and participates in export control regimes and other politically binding arrangements, complying with its legally binding obligations and political commitments. However, it continued to prevent the participation of the Republic of Cyprus in the Conference on Disarmament, and in other Arrangements and Committees. Türkiye has yet to ratify the Arms Trade Treaty, to which it is signatory. Türkiye does not align with EU statements in the framework of the Treaty on the Non-Proliferation of Nuclear Weapons (NPT). As of 2025, Türkiye stopped aligning with EU statements in the context of the Chemical Weapons Convention/OPCW.

In terms of **security measures**, Türkiye has no security of information agreement with the EU on procedures for the exchanges and protection of EU classified information (EUCI). Since 2006, a framework agreement allows Türkiye's participation, including reception of EUCI, in the context of CSDP missions.

Under the **CSDP**, Türkiye continued to actively participate in and make substantial contributions to **EU crisis management missions and operations**. Türkiye continued being the biggest non-EU troops' contributor to the EU Force Operation Althea in Bosnia and Herzegovina, and remained a major contributor to the NATO KFOR peacekeeping force in Kosovo, as well as contributing to UN peacekeeping operations. Türkiye pursued to seek involvement in CSDP and EU defence initiatives, while simultaneously maintaining its policy of excluding one EU Member State from cooperation with NATO. While meetings between the Political and Security Committee and the North Atlantic Council resumed on 28 May 2025, Türkiye's narrow interpretation of the EU-NATO cooperation framework continued to pose an obstacle to enhancing key aspects of a genuine and sustainable organisation-to-organisation relation, particularly with a view to information sharing. As a positive step, informal EU-Türkiye CSDP consultations were held on 11 June 2025, following a four-year hiatus. Türkiye continued to express strong interest in participating in EU defence initiatives showcasing its claim to play a significant role in strengthening future European security.

On **counterterrorism**, Türkiye is an active member of the Global Coalition against Da'esh, and has been cooperating with the EU to improve the exchange of information and cross-border investigations, in particular on foreign terrorist fighters and individuals suspected of terrorism.

On **hybrid threats**, foreign information manipulation and interference (FIMI) activities, including the circulation of disinformation on social and traditional media, continued in Türkiye. Türkiye did not restrict the operations of Russian state-controlled media outlets in the context of Russia's war of aggression against Ukraine. Pro-Russian narratives are widespread in Türkiye. Russia-linked disinformation networks have notably penetrated the Turkish information space, focusing on narratives related to the war in Ukraine, NATO, energy security, and anti-Western sentiment.

Türkiye continued to develop **intense relations and strategic partnerships with countries worldwide**, while also enhancing its regional geopolitical role and normalisation efforts, at the same time seeking to consolidate its stance as a **mediator and provider of humanitarian aid**.

Türkiye claimed to have a balanced position on **Russia's war of aggression against Ukraine**. While expressing support to the new US President's initiative to end the war, Türkiye continued to put forward its ambition to facilitate and mediate talks between Ukraine and Russia, within a mutually agreed framework among the parties. Türkiye successfully hosted direct talks between Russia and Ukraine in Istanbul in May, June and July 2025. Türkiye also expressed readiness to restart the Black Sea grain corridor, to continue efforts to ensure the safety of navigation in the Black Sea in collaboration with the littoral states, such as the demining initiative with Romania and Bulgaria, and insisted on its position to 'strictly enforce' the Montreux Convention. Türkiye reiterated its commitment to Ukraine's sovereignty and territorial integrity. In February 2025, Türkiye supported the UN General Assembly Resolution titled 'Advancing a comprehensive, just and lasting peace in Ukraine' marking the third anniversary of Russia's full-scale invasion of Ukraine.

Türkiye continued its engagement policy towards **Russia**. High-level contacts took place in various areas, demonstrating willingness to enhance and deepen the relation further,

including on regional and global issues. Turkish President attended the BRICS+ Summit held in Kazan in October 2024, and, in August 2025, the two Presidents met on the sidelines of the Shanghai Cooperation Organisation summit in China. Türkiye remained consistently dependent on Russia's energy supplies.

Türkiye remained both an important and a challenging partner for the **United States**. As a NATO ally, it engaged in regular exchanges with the US at all levels. Under the new US administration, Türkiye renewed its interest in advancing its strategic partnership with the United States, notably by seeking the lifting of restrictions related to the Russian S-400 surface-to-air defence system, with a view to enhancing cooperation in the defence industry and rejoin F-35 programme. Türkiye hosted two rounds of bilateral talks between the US and Russia and welcomed the Armenia-Azerbaijan peace agreement brokered by the US. The US President acknowledged Türkiye's role in Syria and in Gaza ceasefire negotiations and called for normalisation of Türkiye's ties with Israel and urged it to cease purchases of Russian oil.

While Türkiye maintained deeply rooted strategic relations with Qatar, including political, military, and economic cooperation, its relations with Oman intensified (defence deals were signed in early 2025), and normalisation with the **Gulf countries** continued at both bilateral and regional level, pursuing engagement on trade and economic cooperation, investments, and defence. Türkiye proactively reached out to Gulf countries on regional peace and security, including developments in Syria, as well as on Gaza, Ukraine, and Sudan. Visits at all levels were frequent, including the landmark visit by the Omani Sultan Haitham to Türkiye in November 2024 – the first by an Omani ruler in nearly four decades, and the Türkiye-GCC (Gulf Cooperation Council) Joint Action Plan for Cooperation was extended until 2029.

Following the normalisation of their relations in 2024, Türkiye and **Egypt** continued to expand bilateral trade and investment and to develop their cooperation in the energy and defence sector. In September 2024, the two Presidents held in Ankara the first meeting of the High-Level Strategic Cooperation Council, and the two countries resumed military cooperation in 2025.

Türkiye relations with **Israel** continued to deteriorate. Türkiye maintained an embargo on all trade with Israel and diplomatic relations remained *de facto* frozen. Türkiye expressed strong criticism of Israeli actions in Gaza, the West Bank, and in neighbouring countries such as Lebanon and Syria, as well as in Iran and Qatar. Türkiye supported South Africa's claim before the International Court of Justice that Israel is committing a genocide in Gaza. It strongly opposed the ideas on any forced displacement of Palestinian populations from the Gaza Strip and supported the UN General Assembly Resolution demanding Israel to end its presence in the Occupied Palestinian Territory. Türkiye did not condemn the 7 October Hamas's terrorist attack against Israel, and continued to support Hamas, listed as a terrorist organisation by the EU, which is in complete disagreement with the EU's position. Türkiye constructively contributed to mediation efforts in advancing the first phase of the Gaza ceasefire and, on 13 October 2025, together with US, Egypt and Qatar, signed the Gaza peace summit declaration in Sharm El-Sheikh. Türkiye expressed readiness to monitor ceasefire implementation joining an international stabilisation force. Türkiye provides considerable humanitarian assistance to Palestinians and supports ceasefire efforts in Gaza, including all related UN resolutions. Türkiye is also a member of the Ad Hoc Liaison Committee and of the Gaza Contact Group. On the **Middle East peace process**, Türkiye aligns with the EU's position on the need to relaunch the political process with a view to implementing the two-state solution and is a member of the 'Global Coalition' supporting its implementation.

In **Syria**, after the fall of the Assad's regime, Türkiye significantly increased its leverage, reopened its embassy in Damascus, and established close relations with Syrian transitional government. In August 2025, Türkiye signed a MoU with the Syrian transitional government to provide military training and advisory support, with the objective of strengthening Syria's defence capabilities. Türkiye's declared objective is achieving a stable and prosperous Syria, and supporting its sovereignty and territorial integrity. In the longer term, this would also allow to create the conditions for the return of Syrian refugees that Türkiye is hosting in large numbers. Türkiye advocates a complete lifting of international sanctions on Syria and welcomed the easing of economic sanctions decided by the EU and US. In June 2025, the Council underlined in its Conclusions that *'the EU remains concerned about involvement of Turkish-backed armed groups in the north of the country'*, and that *'Türkiye's security concerns should be addressed while ensuring all Syrians – including Kurds – can enjoy security and fundamental rights'*. Türkiye's political efforts towards an internal process for a peaceful and sustainable solution to the Kurdish issue, has the potential, if successful, to reduce security threats with important benefits also for the stability of the region, including Syria.

Relations with **Iraq** continued to improve, marked by strategic agreements and increasing cooperation in the fight against terrorism, the Development Road Project, as well as in the fields of energy and water management. In March 2025, Türkiye and Iraq, together with Jordan, Lebanon and Syria, established the Quintet Mechanism to coordinate common policies on regional issues. In May 2025, the Turkish President hosted the Iraqi Prime Minister for the fourth meeting of the Türkiye-Iraq High-Level Strategic Cooperation Council. Eleven agreements were signed across various sectors, including defence and migration. In September 2025, oil flows through the Kirkuk-Ceyhan pipeline to Türkiye resumed, following an interim agreement between the Iraqi Federal Government, the Kurdistan Regional Government, and international oil companies. Despite the PKK's historic announcement of its dissolution, Türkiye maintained its military operations in northern Iraq, diverging from EU policy.

Türkiye and **Iran** maintained a high-level dialogue within their multi-faceted relationship. The two Presidents met on the sidelines of the UN General Assembly in New York in September 2024 and in September 2025 on the side lines of the 25<sup>th</sup> summit of the Shanghai Cooperation Organization in China. In June 2025, Iran's Foreign Minister visited Türkiye to attend a session of the Council of Foreign Ministers of the Organisation of Islamic Cooperation. Türkiye and Iran prioritised good relations, given their shared security concerns and mutual interests in trade and connectivity. In March 2025, following a five-year suspension, train services between the Turkish city of Van and Tehran resumed. Türkiye strongly condemned Israel's attacks on Iran, highlighting the risks of regional escalation following the US strikes, and reiterated its support for a diplomatic solution to the dispute over Iran's nuclear programme. Ankara sought to act as a backchannel between Iran and the US during the war, and welcomed the subsequent ceasefire.

Türkiye remained a pivotal and active player in **Libya**. Ankara continued to advocate for stability and supported the efforts to revitalise the UN-facilitated political process. Türkiye continued to engage with domestic actors across the board. While keeping formal relations with Libya's internationally recognised Government of National Unity (GNU) in Tripoli, it has also significantly increased its diplomatic, military, and economic outreach and presence eastern Libya. Türkiye worked to enhance the cooperation in the field of oil and gas exploration, reaping the benefits stemming from the memoranda of understanding signed with the Tripoli authorities on the demarcation of maritime zones (2019), and on research and drilling in the delineated areas (2022), considered by the EU as an infringement upon the sovereign rights of third states, which does not comply with the Law of the Sea and cannot

produce any legal consequences for third states, as also recalled by the European Council Conclusions in June 2025. Ankara also continues to assess that the UN arms embargo, the UN Security Council resolutions requesting the withdrawal of all mercenaries, foreign fighters and foreign forces from the Libyan territory, and the suspension of military training, have no bearing on the GNU. After having extended its military deployment in Libya until January 2026 via a Parliament bill ratified in 2023, Türkiye initiated steps to ratify a MoU on the status of Turkish forces in Libya. EU's efforts to implement the UN embargo on Libya continued to be challenged by Türkiye's continued scepticism towards Operation EUNAVFORMED Irini, openly questioning its purpose, legitimacy and impartiality.

Türkiye has a growing presence and geopolitical ambitions in the **South Caucasus** and **Central Asia**.

The normalisation process between Türkiye and **Armenia** continued to advance, with contacts between the two Special Envoys, bilateral talks and confidence-building steps. A notable highlight was the historic visit of the Armenian Prime Minister to Türkiye on 20 June, where he met with the Turkish President. Although Türkiye has publicly stated that there are no preconditions for normalisation with Armenia, in practice, it links progress with developments in the peace negotiations between Armenia and Azerbaijan. The Turkish-Armenian border remained closed, but it was briefly opened in March 2025 to allow humanitarian aid from Armenia to Syria. Türkiye maintained very close relations with **Azerbaijan**, holding regular high-level visits and consultations, and joint military exercises. Türkiye unequivocally supported Azerbaijan's stance towards Armenia. Türkiye, Azerbaijan and Georgia continued to cooperate through a trilateral platform, with the latest edition held in September 2024 at the level of Defence Ministers. In addition, Türkiye hosted the South Caucasus 3+3 meeting (Türkiye, Iran, Russia + Armenia, Azerbaijan, Georgia – though the latter boycotts the format).

Türkiye has a well-established presence and geopolitical ambition in **Central Asia**. Türkiye remained focused on strengthening bilateral relations with countries in the region, advancing connectivity projects on transport and energy. In February 2025 Türkiye and Turkmenistan signed an agreement facilitating the flow of natural gas. Türkiye continued to press for stronger political role for the Organization of Turkic States (OTS), while also promoting efforts to legitimise the so-called, internationally not recognised 'Turkish Republic of Northern Cyprus' through participation as an observer in the OTS. This move undermines efforts to foster an environment conducive to the resumption of settlement talks under UN auspices.

Türkiye's relations with **Pakistan** remained strong, at strategic partnership level, and high-level visits took place. In February 2025, the Turkish President visited Islamabad for the 7th Türkiye-Pakistan High-Level Strategic Cooperation Council, reciprocated by the Pakistani Prime Minister who visited Türkiye in May 2025. Amidst India-Pakistan tensions in the spring 2025, the Turkish President expressed solidarity with Pakistan and offered Türkiye's support to de-escalate the situation. Türkiye contributed to mediate, together with Qatar, the October 2025 ceasefire agreement between Pakistan and Afghanistan. Türkiye maintained a pragmatic approach on **Afghanistan**, holding talks with the Taliban *de facto* authorities, while not recognising the Taliban regime. Türkiye hosts Afghan political opponents, though, without facilitating the formation of a joint opposition or armed resistance.

Türkiye continued expanding cooperation opportunities in **Asia** through its 'Asia Anew' initiative, aspiring to become the axis connecting Asia to Europe. Focused on building partnerships with countries from the region, Türkiye sought broad collaboration on economy, trade, defence (including defence industry), cultural and geostrategic issues. During its Asia

tour in February 2025, the Turkish President visited Pakistan, Malaysia, and Indonesia. The Indonesian President visited Türkiye in April 2025. Türkiye also continued its cooperation with **ASEAN**, in line with its status as a sectoral dialogue partner, and further deepened its engagement in the region by becoming a member of the Asian Development Bank.

Türkiye continued to seek opportunities to strengthen trade, economic and investments links with **China**, aiming to reduce its negative trade deficit but also to elevate the bilateral trade volume through various initiatives (Belt and Road Initiative, Middle Corridor, etc.) and formats, such as BRICS. Moreover, the countries engaged in bilateral consultations on major regional and global issues, such as the developments in the Middle East (Syria), Ukraine, and the 'Global South' agenda. The Turkish President participated in the Shanghai Cooperation Organization summit in China (Türkiye is a "dialogue partner") and met with the Chinese President.

In **Africa**, Türkiye continued stepping up its active involvement and further strengthened its ties in sub-Saharan Africa, notably in the Horn of Africa and West Africa, developing cooperation in areas such as defence, hydrocarbon exploration and exploitation, mining. Türkiye managed to successfully mediate between **Somalia** and **Ethiopia**, brokering in December 2024 the Ankara Declaration that reduced regional tensions and charted a possibility for regional cooperation. Türkiye's efforts to mediate between Sudan and the United Arab Emirates aiming at restoring regional stability have been encouraged by both parties.

Türkiye maintained its diplomatic engagement with **Latin America**, aiming to expand and deepen the political and trade relations. The Turkish-**Venezuelan** ties remained strong, marked by frequent bilateral visits and a free trade agreement since 2018.



## ANNEX I – RELATIONS BETWEEN THE EU AND TÜRKİYE

Türkiye remains a candidate country and a key partner to the EU in many areas of joint interest. In **April 2024, the European Council** reiterated the EU's strategic interest in a stable and secure environment in the Eastern Mediterranean and in the development of a cooperative and mutually beneficial relationship with Türkiye. The EU and Türkiye are engaged in advancing on the recommendations of the **November 2023 Joint Communication** by the High Representative and the Commission on the state of play of EU-Türkiye political, economic and trade relations. The EU progressing in a phased, proportionate and reversible manner, subject to the established conditionalities. Work intensified in the 2024 and 2025 with the launch of the new High Level Dialogue on Trade (held twice), and the resumption of the High Level Dialogue on Economy, meetings of the High Level Dialogue on Security and Migration and on Climate, and the intensification of political consultations on foreign and security policy issues. The European Council stressed that Türkiye's own constructive engagement will be instrumental in advancing the various areas of cooperation identified in the Joint Communication.

Türkiye continues to refuse to recognise the Republic of Cyprus and advocates for a two-state solution in Cyprus, contrary to relevant UN Security Council (UNSC) resolutions. In December 2024, the Council reconfirmed its commitment to a **comprehensive settlement of the Cyprus problem** within the UN framework, in accordance with the relevant UNSC resolutions and in line with the principles on which the EU is founded and the EU *acquis*. It welcomed steps taken by the UN Secretary-General towards a resumption of settlement talks, confirming that the EU remains ready to play an active role in supporting all stages of the UN-led process, with all appropriate means at its disposal. Former Commissioner Johannes Hahn was appointed by the Commission as Special Envoy for Cyprus.

The Council conclusions of July 2019, adopted as a response to Türkiye's unauthorised drilling activities in the Eastern Mediterranean, remain in place. In November 2024, following a review of the framework for **restrictive measures** in response to the unauthorised drilling activities, the Council extended the regime for a further year, until 30 November 2025. One individual is currently subject to sanctions. Türkiye has not engaged in any unauthorised drilling activities in the Eastern Mediterranean since the beginning of 2021.

In December 2024, the Council reiterated its serious concerns about the continued and deeply worrying situation in the areas of democracy, rule of law and fundamental rights and that **accession negotiations** with the country have come to a standstill and no further chapters can be considered for opening or closing. As part of accession negotiations, 16 chapters had been opened and one of these had been provisionally closed.

Reforms and developments in Türkiye continued to be monitored by the bodies set up under the **Association Agreement**, with subcommittees in place throughout the reporting period. The meetings of the Association Council remain suspended in line with the 2019 Council conclusions.

The Commission continued intensified engagement with Türkiye to discuss the **functioning of the Customs Union**, including a High-Level Dialogue on Trade in July 2025. Türkiye made progress on trade barriers and took measures to prevent the circumvention of EU restrictive measures against Russia imposed in reaction to Russia's invasion of Ukraine. The Commission recommended opening negotiations with Türkiye on the modernisation of the Customs Union in December 2016. In the Joint Communication of November 2023, the High Representative and the Commission recommended to resume discussions on the draft negotiating framework for the modernisation of the Customs Union. This was on the

understanding that Türkiye rapidly addresses the circumvention of EU restrictive measures against Russia via its territory and continues to resolve trade irritants in an efficient way

Türkiye was EU's fifth largest **trading partner** in 2024, while the EU continued to be Türkiye's largest partner. Türkiye's exports to the EU amounted to EUR 98.4 billion in 2024, while imports from the EU amounted to EUR 112 billion.

In the area of **visa, migration and asylum**, the implementation of the March 2016 EU-Turkey Statement has continued to deliver concrete results in reducing irregular and dangerous crossings on the Eastern Mediterranean route to Europe and in saving lives at sea. Türkiye continued significant efforts to provide support to 2.7 million refugees, including 2.5 million Syrians under temporary protection (as of August 2025), while it continued working to prevent irregular migration. In the context of the EU-Türkiye visa liberalisation dialogue, no outstanding visa liberalisation benchmarks were fulfilled. In July 2025, the European Commission adopted a decision to facilitate visa rules for Turkish citizens applying for Schengen visas. An international agreement on the exchange of personal data between Europol and the Turkish authorities responsible for fighting serious crime and terrorism is yet to be concluded. High-level engagement continued in the area of migration, with a High-Level Dialogue held in July 2025.

Türkiye and the EU continued to cooperate effectively in **supporting refugees and host communities** in Türkiye. Almost EUR 12.5 billion has been allocated for that purpose since 2011, including EUR 6 billion under the Facility for Refugees in Turkey. Support continued to focus on humanitarian assistance, education, health, municipal infrastructure, and socio-economic development and migration management. Support also covered host communities. Over 1.2 million refugees, including the most vulnerable, continue to receive basic needs support, and close to 938 610 refugee children are enrolled in schools. Other achievements include the construction of two major hospitals, 176 new schools (out of a target of 348) and delivering over 6 million healthcare consultations. Out of the total allocation of EUR 12.5 billion, EUR 1.5 billion for 2025-27 will be committed this year.

On bilateral financial assistance, projects under the **Instrument for Pre-accession Assistance** (IPA) for Türkiye continued to be implemented, in compliance with the political guidance of the EU budgetary authority. Financial assistance under IPA III focuses on priorities linked to the fundamental pillars of the enlargement strategy and sectors of common strategic interest, mainly related to the green and digital transition, connectivity as well as to building more resilient and more sustainable economies and societies.

Implementation of the **EU pledge of EUR 1 billion** for the people in Türkiye affected by the February 2023 earthquakes continued.

Türkiye continues to participate in **EU programmes and agencies**, including Erasmus+, Horizon Europe, the European Solidarity Corps programme, the Customs programme, the Single Market Programme (SME component) the Digital Europe Programme, the Union Civil Protection Mechanism, the European Environmental Agency, and the European Union Drugs Agency. On research and innovation, the positive trend of Türkiye's performance in Horizon Europe continued in 2024, with the EU contribution awarded to Turkish stakeholders exceeding EUR 87 million (the total EU contribution surpassed EUR 330.3 million over the first four years of Horizon Europe). The Turkey Investment Platform (TIP) under the European Fund for Sustainable Development Plus (EFSD+) enables stronger EU support to investments through guarantee programmes in the three overarching policy priorities, namely the Green Deal, global gateways as well as jobs and growth. It is expected to mobilise close to EUR 2.4 billion of investments in Türkiye on the back of up to EUR 400 million in EU budget guarantees. To strengthen capacities in modelling the macro-economic

effects of green policies and investments and to support municipalities with their long-term inclusion strategies, Türkiye is participating as an observer in two pilot projects under the Technical Support Instrument.

## Annex II – Statistical data

STATISTICAL DATA (as of 11/09/2025)

<b>Basic data</b>	Note	2012	2020	2021	2022	2023	2024
Population (thousand)		74 724 i	83 155 i	83 614 i	84 680 i	85 280 i	85 372 i
Total area of the country (km <sup>2</sup> )		:	780 270	780 270	780 270	780 270	780 270

<b>National accounts</b>	Note	2012	2020	2021	2022	2023	2024
Gross domestic product (GDP) (million national currency)		1 581 479	5 048 568	7 256 142	15 011 776	26 545 722	43 410 514
Gross domestic product (GDP) (million euro)		683 587	626 785	690 246	862 310	1 030 514	1 220 308
GDP per capita (euro)		9 090	7 520	8 200	10 150	12 080	:
GDP per capita (in purchasing power standards (PPS))		15 233	18 320	19 989	24 509	27 458	:
GDP per capita (in PPS), relative to the EU average (EU-27 = 100)		58.6	60.2 b	60.3	68.2	72.0	:
Real GDP growth rate: change on previous year of GDP volume (%)		4.8	1.9	11.4	5.5	5.1	3.2
Employment growth (national accounts data), relative to the previous year (%)		:	:	:	:	:	:
Labour productivity growth: growth in GDP (in volume) per person employed, relative to the previous year (%)		:	:	:	:	:	:
Unit labour cost growth, relative to the previous year (%)		:	:	:	:	:	:
*3 year change (T/T-3) in the nominal unit labour cost growth index (2015 = 100)		:	:	:	:	:	:
Labour productivity per person employed: GDP (in PPS) per person employed relative to EU average (EU-27 = 100)		:	:	:	:	:	:
Gross value added by main sectors							
Agriculture, forestry and fisheries (%)		8.7	7.5	6.2	7.2	6.9	6.3
Industry (%)		21.8	25.6	29.2	29.5	25.8	22.6
Construction (%)		8.4	5.9	5.7	5.5	6.2	6.7
Services (%)		61.2 i	60.9 i	59.0 i	57.7 i	61.1 i	64.2 i
Final consumption expenditure, as a share of GDP (%)		76.0	71.8	68.2	69.0	72.5	74.2
Gross fixed capital formation, as a share of GDP (%)		27.1	27.5	28.2	29.2	31.9	31.0
Exports of goods and services, relative to GDP (%)		24.4	29.1	35.7	38.6	31.9	28.0
Imports of goods and services, relative to GDP (%)		28.5	32.2	35.3	42.6	34.4	27.8
Gross fixed capital formation by the general government sector, as a percentage of GDP (%)		:	:	:	:	:	:

<b>Business</b>	Note	2012	2020	2021	2022	2023	2024
Industrial production volume index (2015 = 100)		83.4	115.4	135.6	143.3	144.6	:
Number of active enterprises (number)		:	:	3 600 429	3 806 819	:	:
Birth rate: number of enterprise births in the reference period (t) divided by the number of enterprises active in t (%)		:	:	16.0 i	16.1 i	:	:
Death rate: number of enterprise deaths in the reference period (t) divided by the number of enterprises active in t (%)			:	11.4 i	:	:	:

People employed in SMEs as a share of all persons employed (within the non-financial business economy) (%)		76.8 iw	73.9 iw	74.0 iw	73.3 iw	72.5 piw	:
Value added by SMEs (in the non-financial business economy) (EUR million)		102 423 iw	95 660 iw	88 925 iw	144 282 iw	155 216 piw	:
Total value added (in the non-financial business economy) (EUR million)		183 539 w	181 250 w	178 072 w	281 635 w	304 258 pw	:

<b>Inflation rate and house prices</b>	Note	2012	2020	2021	2022	2023	2024
Consumer price index (CPI), change relative to the previous year (%)		9.0 d	12.3 d	19.6 d	72.3 d	54.0 d	58.5 d

<b>Balance of payments</b>	Note	2012	2020	2021	2022	2023	2024
Balance of payments: current account total (million euro)		- 32 316.2	- 27 404.9	- 5 110.7	- 43 409.5	- 36 990.3	- 9 497.5
Balance of payments current account: trade balance (million euro)		- 50 905.9	- 33 199.5	- 24 850.1	- 85 457.6	- 79 815.6	- 52 163.2
Balance of payments current account: net services (million euro)		22 587.9	13 210.2	27 960.7	50 712.6	52 867.9	57 165.2
Balance of payments current account: net balance for primary income (million euro)		- 5 124.2	- 7 569.2	- 9 016.9	- 8 353.1	- 10 555.6	- 14 571.0
Balance of payments current account: net balance for secondary income (million euro)		1 126.1	153.5	795.6	- 311.3	513.0	71.5
Net balance for primary and secondary income: of which government transfers (million euro)		305.5	90.9	355.2	- 583.1	- 762.6	- 159.2
*3 year backward moving average of the current account balance relative to GDP (%)		- 6.5	- 1.4	- 1.0	- 3.4	- 3.1	- 3.1
*Five year change in share of world exports of goods and services (%)		:	- 9.4	5.3	11.2	18.4	12.8
Net balance (inward - outward) of foreign direct investment (FDI) (million euro)	1)	:	3 883.8 i	5 336.9 i	8 170.2 i	4 324.7 i	:
Foreign direct investment (FDI) abroad (million euro)	1)	:	2 833.7	4 262.0	4 475.1	5 334.1	:
of which FDI of the reporting economy in the EU-27 countries (million euro)	1)	:	1 069.1	1 805.9	2 266.9	2 438.9	:
Foreign direct investment (FDI) in the reporting economy (million euro)	1)	:	6 717.5	9 598.9	12 645.3	9 658.8	:
of which FDI of the EU-27 countries in the reporting economy (million euro)	1)	:	1 201.1	2 084.4	5 060.0	4 378.0	:
*Net international investment position, relative to GDP (%)		:	- 49.6	- 30.4	- 38.9	- 28.7	- 26.7
Year on year rate of change in gross inflow of remittances (in national currency) from migrant workers (%)		0.1 iw	0.0 iw	0.0 iw	0.0 iw	0.0 iw	0.0 iw

<b>Public finance</b>	Note	2012	2020	2021	2022	2023	2024
General government deficit / surplus, relative to GDP (%)		:	:	:	:	:	:
General government gross debt relative to GDP (%)		:	:	:	:	:	:
Total government revenues, as a percentage of GDP (%)		:	:	:	:	:	:
Total government expenditure, as a percentage of GDP (%)		:	:	:	:	:	:

<b>Financial indicators</b>	Note	2012	2020	2021	2022	2023	2024
Gross external debt of the whole economy, relative to GDP (%)		40.6 iw	59.7 iw	53.2 iw	50.1 iw	44.8 iw	39.8 iw
Gross external debt of the whole economy, relative to total exports (%)		168.7 w	205.7 w	150.9 w	131.4 w	139.5 w	141.1 w
Money supply: M1 (banknotes, coins, overnight deposits, million euro)		76 512.5 w	135 348.7 w	143 842.8 w	156 740.1 w	145 708.9 w	171 564.1 w
Total credit by monetary financial institutions to residents (consolidated) (million euro)		325 483.7	386 656.9	361 436.1	452 583.0	472 686.1	541 008.8
*Annual change in financial sector liabilities (%)		18.4	34.1	42.9	80.9	48.3	25.3

*Private debt, consolidated, relative to GDP (%)		62.2	88.1	87.3	64.7	57.3	48.0
Interest rates: day-to-day money rate, per annum (%)		7.59	10.85	17.87	13.16	18.69	48.95
Euro exchange rates: average of period (1 euro = ... national currency)		2.314	8.055	10.512	17.409	25.760	35.573
Trade-weighted effective exchange rate index, 42 countries (2015 = 100)		128.6 w	40.0 w	30.7 w	17.8 w	12.4 w	9.1 w
*3 year change (T/T-3) in the trade-weighted effective exchange rate index, 42 countries (2015 = 100)		- 0.1 iw	- 0.5 iw	- 0.5 iw	- 0.6 iw	- 0.7 iw	- 0.7 iw
Value of reserve assets (including gold) (million euro)		16 389.8	- 29 004.1	19 405.7	13 110.7	- 1 949.6	691.1

<b>External trade in goods</b>	Note	2012	2020	2021	2022	2023	2024
Value of imports: all goods, all partners (million euro)		184 087	182 328	219 224	324 441	311 586	296 606
Value of exports: all goods, all partners (million euro)		118 644	140 035	180 299	223 777	214 180	219 316
Trade balance: all goods, all partners (million euro)		- 65 443	- 42 293	- 38 925	- 100 663	- 97 406	- 77 291
Terms of trade (export price index / import price index * 100) (number)		:	98.4 iw	85.9 iw	75.7 iw	85.0 iw	86.7 iw
Share of exports to EU-27 countries in value of total exports (%)		33.2 iw	41.1 iw	41.1 iw	40.4 iw	40.8 iw	41.9 iw
Share of imports from EU-27 countries in value of total imports (%)		34.7 iw	33.1 iw	31.1 iw	25.5 iw	29.0 iw	32.0 iw

<b>Demography</b>	Note	2012	2020	2021	2022	2023	2024
Crude rate of natural change of population (natural growth rate): number of births minus deaths (per thousand inhabitants)		11.7	:	:	6.2	5.1	5.2
Infant mortality rate deaths of children under one year of age (per thousand live births)		11.6	:	9.3	9.2	10.0	:
Life expectancy at birth: male (years)		74.8	:	:	74.3	74.8	:
Life expectancy at birth: female (years)		80.5	:	:	78.4	79.8	:

<b>Labour market</b>	Note	2012	2020	2021	2022	2023	2024
Economic activity rate for persons aged 20–64: proportion of the population aged 20–64 that is economically active (%)		57.4	58.7	61.2 b	63.1	63.1	64.0
Employment rate for persons aged 20–64: proportion of the population aged 20–64 that are in employment (%)		52.8	51.0	53.9 b	56.5	57.3	58.5
Male employment rate for persons aged 20–64 (%)		75.0	70.1	73.6 b	75.9	76.5	77.5
Female employment rate for persons aged 20–64 (%)		30.9	32.0	34.2 b	37.0	38.0	39.4
Employment rate for persons aged 55–64: proportion of the population aged 55–64 that are in employment (%)		31.9	31.1	33.6 b	34.9	36.3	38.5
<b>Employment by main sectors</b>							
Agriculture, forestry and fisheries (%)		23.6 i	17.6 i	17.2 bi	15.7 i	14.6 i	14.6 i
Industry (%)		19.1 i	20.5 i	21.4 bi	21.7 i	21.3 i	20.7 i
Construction (%)		6.9 i	5.7 i	6.1 bi	6.0 i	6.3 i	6.6 i
Services (%)		50.4 i	56.2 i	55.3 bi	56.6 i	57.8 i	58.1 i
People employed in the public sector as a share of total employment, persons aged 20–64 (%)		:	:	:	:	:	:

People employed in the private sector as a share of total employment, persons aged 20–64 (%)		:	:	:	:	:	:
Unemployment rate: proportion of the labour force that is unemployed (%)		8.2	13.2	12.0 b	10.5	9.4	8.8
Male unemployment rate (%)		7.7	12.4	10.7 b	9.0	7.7	7.1
Female unemployment rate (%)		9.4	14.9	14.7 b	13.5	12.7	11.8
Youth unemployment rate: proportion of the labour force aged 15–24 that is unemployed (%)		15.7	25.1	22.7 b	19.5	17.5	16.4
Long-term unemployment rate: proportion of the labour force that has been unemployed for 12 months or more (%)		1.8	3.3	3.7 b	2.5	2.0	1.7
Unemployment rate for persons (aged 25–64) having completed at most lower secondary education (ISCED levels 0-2) (%)		6.7	11.8	10.4 b	8.6	7.6	7.1
Unemployment rate for persons (aged 25–64) having completed tertiary education (ISCED levels 5-8) (%)		6.7	10.0	10.0 b	9.4	8.2	7.6

<b>Social cohesion</b>	Note	2012	2020	2021	2022	2023	2024
Average nominal monthly wages and salaries (national currency)	2)	1 327 w	3 501 w	3 904 w	4 742 w	8 568 w	17 480 w
Index of real wages and salaries (index of nominal wages and salaries divided by the inflation index) (2016 = 100)		:	:	:	:	:	:
Gini coefficient		:	43.4	42.5	45.3	44.2	44.8
Poverty gap		30.3	27.5	27.0	24.8	24.7	24.3

<b>Standard of living</b>	Note	2012	2020	2021	2022	2023	2024
Number of passenger cars relative to population size (number per thousand population)		114.0	157.0	162.0	167.0	178.0	189.0
Number of mobile phone subscriptions relative to population size (number per thousand population)		895.0 w	982.0 w	1 019.0 w	1 058.8 w	1 080.3 w	:
Mobile broadband penetration (per 100 inhabitants)		26.0 w	78.5 w	82.7 w	84.0 w	86.3 w	:
Fixed broadband penetration (per 100 inhabitants)		10 w	20 w	21 w	22 w	23 w	:

<b>Infrastructure</b>	Note	2012	2020	2021	2022	2023	2024
Density of railway network (lines in operation per thousand km <sup>2</sup> )		:	13.3 i	13.5 i	13.7 i	14.6 i	:
Length of motorways (kilometres)		2 127	3 523	3 532	3 633	3 726	:

<b>Education, Innovation and Research</b>	Note	2012	2020	2021	2022	2023	2024
Percentage of persons aged 30-34 with a tertiary education level (ISCED 2011 levels 5 to 8)		18.0	33.1	35.5 b	37.6	39.9	41.7
Percentage of persons aged 30-34 with a tertiary education level (ISCED 2011 levels 5 to 8), males		19.8	33.9	36.0 b	37.4	39.2	40.3
Percentage of persons aged 30-34 with a tertiary education level (ISCED 2011 levels 5 to 8), females		16.2	32.2	35.1 b	37.9	40.5	43.1
Participation in early childhood education (children aged 3 and over)		:	42.2	31.7	48.6	54.9	:
Participation in early childhood education (children aged 3 and over), males		:	42.5	32.1	48.9	55.3	:
Participation in early childhood education (children aged 3 and over), females		:	41.8	31.3	48.3	54.5	:

Low achieving 15-year-olds in reading		21.6	:	:	29.3	:	:
Low achieving 15-year-olds in mathematics		42.0	:	:	38.7	:	:
Low achieving 15-year-olds in science		26.4	:	:	24.7	:	:
Early leavers from education and training: proportion of persons aged 18-24 with at most lower secondary education (at most ISCED 2011 level 2) who are not in further education or training		39.6	26.7	23.1 b	21.2	19.5	18.7
Early leavers from education and training: proportion of men aged 18-24 with at most lower secondary education (at most ISCED 2011 level 2) who are not in further education or training		36.1	27.5	23.9 b	22.2	20.1	19.6
Early leavers from education and training: proportion of women aged 18-24 with at most lower secondary education (at most ISCED 2011 level 2) who are not in further education or training		43.0	25.8	22.2 b	20.2	19.0	17.8
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks)		3.9	5.8	6.5 b	6.7	7.4	8.0
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), men		4.0	6.0	6.5 b	6.4	7.0	7.3
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), women		3.8	5.5	6.5 b	7.0	7.8	8.6
Exposure of vocational education and training (VET) graduates to work-based learning (% of population aged 20-34)		:	:	:	:	:	:
Share of individuals having at least basic digital skills (% of population aged 16-74)		:	:	30.1	:	33.1	:
Share of individuals having at least basic digital skills (% of population aged 16-74), males		:	:	34.0	:	36.8	:
Share of individuals having at least basic digital skills (% of population aged 16-74), females		:	:	26.2	:	29.4	:
Public expenditure on education relative to GDP (%)		:	4.0	:	3.1	:	:
Gross domestic expenditure on R&D relative to GDP (%)		0.83	1.37	1.40	1.32	1.42	:
Government budget appropriations or outlays on R&D (GBAORD), as a percentage of GDP (%)		0.34	0.41	0.38	0.36	0.37	0.40 p
Percentage of households who have internet access at home (%)		47.2	90.7	92.0	94.2	95.5	96.5

<b>Environment</b>	Note	2012	2020	2021	2022	2023	2024
Index of greenhouse gas emissions, CO <sub>2</sub> equivalent (1990 = 100)		199.6 ew	232.5 ew	250.9 ew	244.9 ew	:	:
Energy intensity of the economy (kg of oil equivalent per 1 000 euro GDP at 2015 constant prices)		183.5	162.8	159.6	157.8	:	:
Electricity generated from renewable sources relative to gross electricity consumption (%)		26.9 w	41.9 w	35.6 w	41.6 w	41.8 w	:
Road share of inland freight transport (based on tonne-km) (%)		94.9 w	94.6 w	95.6 w	95.7 w	96.5 w	:

<b>Energy</b>	Note	2012	2020	2021	2022	2023	2024
Primary production of all energy products (thousand TOE)		30 490	43 636	46 208	50 484	48 870	:
Primary production of crude oil (thousand TOE)		2 310	3 274	3 518	3 663	4 206	:
Primary production of solid fuels (thousand TOE)		15 554	15 006	17 151	18 835	14 682	:
Primary production of gas (thousand TOE)		521	363	324	312	665	:



Net imports of all energy products (thousand TOE)		89 313 i	104 983 i	115 096 i	113 942 i	114 008 i	:
Gross inland energy consumption (thousand TOE)		117 910	148 074	161 774	159 458	162 366	:
Gross electricity generation (GWh)		239 497	306 703	334 723	328 379	331 149	:

<b>Agriculture</b>	Note	2012	2020	2021	2022	2023	2024
Agricultural output volume index (at producer prices) (2015 = 100)		:	:	:	:	:	:
Utilised agricultural area (thousand hectares)		38 412.0	37 747.0	38 038.0	38 450.0	38 563.0	38 596.0
Livestock numbers: live bovine animals (thousand heads, end of period)		14 022.4	18 158.0	18 036.1	17 023.8	16 583.0	16 986.3
Livestock numbers: live swine (thousand heads, end of period)		:	:	:	1.7 e	1.7	1.7
Livestock numbers: live sheep and live goats (thousand heads, end of period)		35 782.5 i	54 112.6 i	57 519.2 i	56 265.8 i	52 363.4 i	54 902.7 i
Raw milk available on farms (thousand tonnes)		:	:	:	:	:	:
Harvested crop production: cereals (including rice) (thousand tonnes)		33 025.0	38 050.8	32 602.0	39 562.1	43 176.3	39 922.3
Harvested crop production: sugar beet (thousand tonnes)		15 000.0	23 026.0	18 250.0	19 000.0	23 498.0	22 999.0
Harvested crop production: vegetables (thousand tonnes)		28 105.0	31 120.0	31 691.0	31 525.0	31 716.0	33 496.0

**Source: Eurostat and/or the statistical authorities in Türkiye**

: = not available

b = break in series

d = definition differs

e = estimated value

p = provisional

i = Eurostat estimate

w= data supplied by and under the responsibility of the national statistical authority and published on an "as is" basis and without any assurance as regards their quality and adherence to EU statistical methodology

\* = Macroeconomic Imbalance Procedure (MIP) indicator

Footnotes:

1) Based on BPM6.

2) Source: Income and Living Conditions Survey.

