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Türkiye 2026 Report

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2026 Communication on EU enlargement policy

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1. INTRODUCTION[1]

1.1 CONTEXT

Türkiye is a candidate country and a key partner for the European Union (EU). In December 2024, the Council Conclusions on enlargement[2] 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 Conclusions reaffirmed that the EU attaches particular importance to the resumption of and progress in the Cyprus settlement talks in further enhancing EU-Türkiye cooperation. The EU and Türkiye continue to pursue re-engagement in areas of mutual interest, in line with the recommendations set out in the Joint Communication on EU-Türkiye relations of 23 November 2023[3] and the relevant European Council Conclusions[4]. High-level engagement has therefore been stepped up in areas of joint interest[5]. The EU is re-engaging constructively with Türkiye in a phased, proportionate and reversible manner, subject to established conditionalities.

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 have not been addressed. The arrests of and charges brought against elected officials, opposition figures, political activists, civil society and business representatives, journalists, and others, including judicial action targeting the main opposition party, have intensified in 2026. This has given rise to increasing doubts over Türkiye's adherence to core democratic principles, including political pluralism, freedom of expression and association and non-discrimination while deepening concerns about the independence of the judiciary. As a result, the gap between Türkiye's declared objective of joining the EU and its backsliding with regard to the fundamental political criteria for EU accession has further widened.

The 2016 EU-Turkey Statement has continued to yield results and has remained the key framework for cooperation on migration. Türkiye has sustained its remarkable efforts to host 2.3 million refugees, including Syrians under temporary protection. The EU has mobilised EUR 12.5 billion to support refugees and host communities since 2011 and has continued to provide assistance in areas such as basic needs, border management, education, healthcare, protection and socio-economic support. Türkiye remained the EU's fifth largest trading partner in 2025, with bilateral trade reaching a record high of over EUR 218 billion. Growing geopolitical challenges have highlighted Türkiye's strategic regional role, particularly in relation to developments in Syria, Ukraine, Gaza, the wider Middle East and the South Caucasus.

Since 2023, bilateral relations between Türkiye and Greece have overall improved, with Türkiye not engaging in any unauthorised drilling activities in the Eastern Mediterranean.

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[1] This report covers the period from 1 September 2025 to 1 September 2026. 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.

[2] The Council issued Conclusions concerning Türkiye on 17 December 2024.

[3] JOIN(2023) 50 final.

[4] Particularly the European Councils on 25-26 March 2021, 29-30 June 2023, and on 17-18 Apil 2024.

[5] The EU-Türkiye High-Level Dialogue on Climate took place in October 2025; the EU-Türkiye High-Level Dialogue on Science, Research, Technology and Innovation in November 2025, the EU-Türkiye High-Level Economic Dialogue in July 2026, and the EU-Türkiye High-Level Dialogue on Trade in October 2026.

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Cases of flights over Greek islands have resumed and violations of Greece's national airspace and territorial waters have risen significantly. By Presidential Decree of 15 August 2026, Türkiye declared two marine parks in the northeastern Aegean and the eastern Mediterranean, which extend predominantly beyond Turkish territorial waters into the high seas. Türkiye has continued to refuse to recognise the Republic of Cyprus and has repeatedly advocated for a two-state solution in Cyprus, contrary to UN Security Council Resolutions on the matter.

1.2 MAIN FINDINGS OF THE REPORT

THE FUNDAMENTALS OF THE ACCESSION PROCESS

Democracy

The electoral framework ensures a choice between alternative political options, but recent judicial interventions risk further undermining the level playing field for all political stakeholders. Judicial pressure on opposition politicians and the main opposition party has increasingly stifled political competition, eroding democratic principles and the integrity of the electoral process.

Parliament's exercise of its powers, including oversight of the executive and the adoption of legislation, is constrained. The highly centralised presidential system has seriously weakened parliamentary prerogatives and eroded the separation of powers.

The **governance** system lacks effective checks and balances, as there are no tools to hold the government accountable beyond elections. The Presidency has authority over most regulatory bodies while public administration is highly politicised. The removal from office and prosecution of elected opposition mayors has further weakened local governance.

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

Civil society continues to operate in a difficult and restrictive environment, facing increasing pressure compounded by withdrawal of foreign donors. Where foreign funding links exist, civil society organisations (CSOs) are often subjected to smear campaigns, while foreign donors are stigmatised. Ongoing legal and administrative pressure from authorities restrict the civic space. Public consultations with independent CSOs on new legislation and policies remained very limited and lack a formal mechanism. Civil society continued to be vocal and to participate actively in civic life.

Public administration reform

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 reform and public financial management in line with the Principles of Public Administration, as well as conduct and publish a new round of public expenditure and financial accountability assessment (PEFA) to assess the performance of the current public finance management system;

→ introduce merit-based recruitment, appointments and promotions, notably to senior positions;

→ ensure policy planning documents and legislative proposals are developed using inclusive and evidence-based methods.

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 have intensified.

Functioning of the judiciary

Türkiye's judiciary is still at an **early stage of preparation** and **backsliding** has continued. Fundamental structural deficiencies remain unaddressed. The reporting period provided further evidence of the control exercised by the executive over the judiciary, undermining the independence and compromising the quality of judicial outcomes. The judiciary continued to act selectively, targeting opposition figures and elected officials while refraining from pursuing similar action against officials from the ruling coalition. In August 2026, the Grand Chamber of the European Court of Human Rights (ECtHR) ruled that structural shortcomings likely facilitate the influence of the executive on judicial decisions. Certain ECtHR judgments still need to be implemented while several courts continued to refuse to implement the rulings of the Turkish Constitutional Court, compromising the integrity and the functioning of the entire system. The Grand Chamber categorised the continued detention of Osman Kavala, despite two previous judgments of the Court requiring his immediate release, a 'flagrant denial of justice'.

The European Commission's previous recommendations for addressing these issues still need to be implemented. These recommendations therefore remain valid and are considered even more pressing. 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 particular regard to the rights of victims of crime 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. **No progress** was made during the reporting period. Türkiye continues to lack a reform strategy and action plan to prevent and control corruption and has not set up anti-corruption bodies in line with the Council of Europe's recommendation. The legal framework has not been reformed in line with the EU *acquis*, 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.

No measures were introduced to prevent undue political interference in the prosecution and adjudication of corruption cases. During the reporting period, several high-level corruption cases were opened against opposition-elected mayors and local politicians. Regardless of the merits of the cases, prosecutions primarily target opposition-affiliated local politicians. These selective investigations and prosecutions undermine public trust in the authorities' efforts to combat corruption, which depend on independent, accountable, transparent, and effective institutions. Targeted risk assessments followed by specific measures are 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:

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→ implement its international obligations in the fight against corruption, in particular the UN Convention against Corruption and 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 shows 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 has deteriorated further. While the legal framework establishes general guarantees for the respect of human and fundamental rights, certain provisions of Türkiye's legislation, as well as their implementation, are not in line with the European Convention on Human Rights (ECHR) and ECtHR case law. During the reporting period, journalists, lawyers, academics, human rights defenders, and other critical voices continued to face investigations, prosecutions, and convictions, often on charges of alleged terrorism support, disinformation, or insulting public officials. LGBTIQ+ persons and civil society organisations were also targeted by judicial, law-enforcement and digital operations, notably on grounds of 'obscenity', with some activists reported to be charged as being members of criminal organisations.

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

→ ratify the Protocol amending the Council of Europe Convention on the prevention of terrorism in order to align with the EU on the definition of terrorist offences; align its anti-terrorism 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, and tackle all forms of racism and discrimination, including against LGBTIQ+ persons, and ensure the protection of persons belonging to minorities;

→ implement the ECtHR judgments as a matter of priority, including in the case of Kavala vs Türkiye.

Freedom of expression and media freedom

Türkiye remains at an **early stage of preparation** in this area, while **backsliding continued** during the reporting period. The implementation of criminal laws related to national security and counter-terrorism continued to violate the ECHR and to diverge from the case law of the ECtHR, thereby hindering freedom of expression. There has been a sustained escalation in judicial and administrative measures against voices critical of the government, including by using criminal investigations to justify the appointment of trustees in private media or by blocking of media outlets' online presence. The media and broadcasting regulator continued to impose discriminatory administrative and monetary fines, disproportionately targeting independent and opposition-aligned media outlets. A new amendment on social media access, alongside the Law on cybersecurity and the Law on disinformation, raises serious concerns due to vague provisions and the lack of independent oversight, risking 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;

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→ revise its criminal legislation, in particular the anti-terrorism law, the Criminal Code, the Law on data protection, the Law on the internet, the Law on disinformation, the Law on cybersecurity, as well as the legal framework on the Radio and Television Supreme Council and the Internet Supervisory Authority, to ensure that they comply with European standards and are implemented in a 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

Türkiye is **moderately prepared** in the area of justice, freedom and security. **Some progress** was made in this area, particularly in relation to Türkiye's capacity to survey and protect its land borders. Türkiye continued to make significant efforts to host and support 2.3 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, resume 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; in the meantime, Türkiye should make full use of existing cooperation channels with Europol and step up information sharing, including on counter-terrorism, where operationally relevant.

→ 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. Law enforcement cooperation continued in some areas but needs to be improved and is hampered by Türkiye's lack of alignment with the EU's data protection legislation. While some legal changes have been made alongside actions to improve the operational capacity of law enforcement agencies, overall progress has been inadequate, and organised crime remains a persistent threat.

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 counter-terrorism in line with the EU *acquis* and further strengthen its anti-money laundering, terrorist financing and proliferation financing framework in line with relevant international standards, including the FATF Recommendations;

→ conclude an agreement with the EU on cooperation with Eurojust; further increase its operational commitment to cooperate and exchange information with EU law enforcement partners and engage in effective judicial cooperation with EU Member States;

→ align its legislation on witness protection with the EU *acquis*, expanding it to cover all types of serious crime.

ECONOMIC CRITERIA

The existence of a functioning market economy

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Türkiye is **well advanced** in establishing a functioning market economy and has made **some progress** over the reporting period. The conflict in the Middle East and rising domestic political tensions have weighed on the ongoing economic stabilisation programme, while GDP growth has slowed down. Fiscal policy was tightened in 2025 to support disinflation. Fiscal and monetary policy stayed prudent during the first half of 2026, yet inflation remained high, prompting several upward revisions to inflation targets. The central bank has made progress in restoring its credibility, but its independence is not entrenched yet.

The current account deficit widened during the reporting period but remained moderate. The external position was broadly healthy, though still fragile, with rising downside risks.

The banking sector remained well capitalised and robust.

The labour market weakened amid persistent structural challenges, such as large labour underutilisation, a high youth unemployment rate, and a low female participation rate. Businesses struggle with long court proceedings, a lack of consultation on new legislative proposals and a large informal economy. Trade and price-setting interventions increased, and State aid transparency and control remain weak.

The policy guidance set out in the conclusions of the Economic and Financial Dialogue of May 2025 was partially implemented. To improve the functioning of the market economy, Türkiye should in particular:

→ ensure a sufficiently tight economic policy stance to support disinflation;

→ reduce consumption limits and subsidy rates on electricity and natural gas while protecting the most vulnerable households;

→ improve the business environment by increasing institutionalised and inclusive stakeholder consultation, reducing the duration of court proceedings, advancing public procurement legislation to limit the use of exclusions and negotiated procedures, and continuing efforts to reduce the informal economy.

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

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 agricultural sectors. Investment activity was strong in 2025 but decelerated during the first half of 2026. Despite continued efforts to strengthen education and human capital, structural challenges persist in the education system and progress to enhance innovation remains limited. Economic integration with the EU is high.

The Commission's 2025 recommendations were only partially implemented and therefore remain valid. To improve competitiveness and support long-term growth, Türkiye should in particular:

→ further tailor education and training to labour market needs, including by promoting green and digital skills, improving the quality of and access to vocational education and training, and supporting the school-to-work transition;

→ further increase the share of renewables in the energy mix, while investing in the reinforcement of the transmission grid to ensure its stability and reliability;

→ improve small to medium-sized enterprises' (SMEs) access to long-term finance.

Chapter 5: Public procurement

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

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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

Türkiye is **moderately prepared** in the area of statistics. **Some progress** was made, by implementing a benchmark revision in national accounts, updating the methodology for calculating the Consumer Price Index, and conducting the agricultural census. However, the Turkish Statistical Institute (TurkStat) should strengthen public trust in official statistics by proactively informing users about the methodology and quality of the published statistics.

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

→ set transparent, professional criteria for the appointment and dismissal of the President of TurkStat to strengthen TurkStat's professional independence;

→ step up efforts to fully align national accounts with the European System of Accounts (ESA 2010) and the requirements of the ESA 2010 transmission programme, including increased efforts to remove the flags preventing the publication of data and further alignment of the GNI inventory with Eurostat's guidelines;

→ enhance statistics on agriculture and on migration and asylum.

Chapter 32: Financial control

Türkiye has a **good level of preparation** in the area of financial control, but made **no progress** during 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 and publish a new round of public expenditure and financial accountability assessment (PEFA) to assess the performance of the current public finance management (PFM) in view of preparing a comprehensive PFM reform strategy and update the public internal financial control policy paper along with its action plan;

→ review the arrangements for including municipalities and state-owned enterprises in the treasury single account;

→ develop and adopt a national anti-fraud strategy.

CLUSTER 2: INTERNAL MARKET

Chapter 1: Free movement of goods

Türkiye has a **good level of preparation** on the free movement of goods. **Some progress** was made in aligning with the EU *acquis*, particularly in product legislation under the 'old approach' and the 'new and global approach'. No progress was made on the import surveillance system for EU-originated products, while a good level of cooperation was maintained regarding risk-based product safety checks at imports.

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The Commission's recommendations from last year were only partially implemented and therefore remain 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, focusing on priority barriers discussed in the context of the High-Level Dialogue on Trade;

→ review the remaining schemes setting local content requirements;

→ increase the coverage and effectiveness of market surveillance measures, particularly on e-commerce.

Chapter 2: Freedom of movement for workers

Türkiye remains at an **early stage of preparation** on the freedom of movement for workers. **Limited progress** was made during 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:

→ prepare legislation and administrative practices in view of joining the European Employment Services (EURES) network;

→ start preparing for the alignment of legislation with the EU *acquis* on free movement of workers, including access for EU citizens to the labour market and equal treatment of EU workers.

Chapter 3: Right of establishment and freedom to provide services

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 with the EU *acquis* in the area of postal services;

→ 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

Türkiye is **moderately prepared** in the area of free movement of capital. **Some progress** was made during the reporting period, including by adopting a new National AML/CFT and confiscation Strategy and an Action Plan against illegal online betting. Building on earlier reforms in line with the standards of the Financial Action Task Force (FATF), Türkiye continued to strengthen its legal framework and institutional capacity to combat money laundering and terrorist financing. Limitations on capital movements and on foreign ownership persist in numerous sectors.

The Commission's recommendations from last year were only partially implemented and therefore remain 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.

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Chapter 6: Company law

Türkiye is **well advanced** in the area of company law. **No progress** was made during the reporting period and the Commission's recommendations from last year remain valid.

In the coming year, Türkiye should in particular:

→ further align its national legislation with the EU *acquis* on shareholder rights and on cross-border conversions, mergers and divisions;

→ implement arrangements for company reporting, including alignment with the EU *acquis* on 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 implement related measures.

Chapter 7: Intellectual property law

Türkiye has a **good level of preparation** in the area of intellectual property law. **No 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 remain valid. In the coming year, Türkiye should in particular:

→ improve enforcement measures to efficiently fight infringements of intellectual property rights (IPRs), 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 IPRs, to better analyse systemic IPR shortcomings.

Chapter 8: Competition policy

Türkiye has **some level of preparation** in the area of 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 met 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

Türkiye has a **good level of preparation** on financial services. **Limited progress** was made during the reporting period, particularly in the phasing-out all forbearance measures by early 2026. Türkiye also updated its regulatory framework by restructuring the organisational and operational procedures of the Capital Markets Board, to respond to changing needs and the expansion of its activities.

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

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→ continue efforts to align its legislation with the revised Capital Requirements Regulation, Capital Requirements Directive and Bank Recovery and Resolution Directive;

→ further align its legislation with the EU *acquis* on capital markets and financial market infrastructures, and ensure their proper supervision;

→ further align with the EU *acquis* on insurance and occupational pensions, including the Solvency II Directive and the Motor Insurance Directive.

Chapter 28: Consumer and health protection

Türkiye has a **good level of preparation** on consumer and health protection. **Limited progress** was made, notably by strengthening the surveillance system for health services and improving healthcare services for vulnerable groups.

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

→ strengthen consumer rights enforcement, notably by taking more measures on infringements in the digital environment;

→ further improve coordination and cooperation with the consumer movement and enforcement bodies, including awareness-raising activities and introducing more measures to support vulnerable consumers;

→ further strengthen healthcare services by providing sufficient resources for sexual and reproductive health and commodities, mental health, and public health emergencies and disasters at central and provincial levels, and by increasing the access to healthcare services for vulnerable groups.

CLUSTER 3: COMPETITIVENESS AND INCLUSIVE GROWTH

Chapter 10: Digital transformation and media

Türkiye has **some level of preparation** in the area of digital transformation and media. **Some progress** was made during the reporting period, particularly through the 5G spectrum auction and start of its roll-out, updates to the e-commerce framework, the continued expansion of e-governance services and the further institutionalisation of the Cybersecurity Presidency.

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

→ align its universal service, authorisation arrangements, market access rules and rights of way in e-communications with the EU *acquis*;

→ align its cybersecurity framework with EU cybersecurity standards, including the NIS 2 Directive and the 5G Cybersecurity Toolbox;

→ strengthen the independence of the regulatory authority and its board members, 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

Türkiye is **moderately prepared** in the area of taxation. **No progress** was made over the reporting period.

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

→ enable the automatic exchange of tax information with all EU Member States;

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→ continue to align its legislation on value added tax (VAT) and excise duties, notably the range of excisable energy products with the EU *acquis;*

→ continue the fight against the informal economy and report on progress transparently by using performance indicators.

Chapter 17: Economic and monetary policy

Türkiye has **some level of preparation** on economic and monetary policy. **Good progress** was made during the reporting period. The central bank has kept monetary policy relatively tight to support the ongoing disinflation process. While proceeding with the simplification of the macro-prudential framework, the country took additional measures to support the monetary policy transmission mechanism.

The Commission' recommendations from last year were largely implemented, yet their continued implementation remains relevant. In the coming year, Türkiye should in particular:

→ safeguard the independence of the central bank;

→ maintain financial stability and further simplify the monetary policy framework under a transparent monetary policy.

Chapter 19: Social policy and employment

Türkiye has **some level of preparation** on social policy and employment. **Limited progress** was made over the reporting period regarding occupational safety and health and active labour market measures. Concerns remain regarding low employment rates, particularly for women, high Not in Education, Employment, or Training (NEET) rates, trade union and collective bargaining rights, persistent levels of informal employment, discrimination in employment, the labour market gender gap, and income inequalities.

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

→ take steps to align with the EU *acquis* and strengthen the enforcement of labour law, occupational health and safety, work-life balance, non-discrimination and equal opportunities in the workplace, and pay transparency;

→ remove obstacles that limit the trade union and collective bargaining rights and ensure the enabling of social dialogue mechanisms;

→ increase the formal employment rate of women and NEETs and expand affordable care services for children and older people.

Chapter 20: Enterprise and industrial policy

Türkiye is **moderately prepared** on enterprise and industrial policy. **Limited progress** was made during the reporting period. Concerns remain regarding the compatibility of public procurement practices with EU industrial policy principles, the lack of transparency in State aid for large investments, and the large 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 schemes that are incompatible with EU industrial policy principles, such as the public procurement price premiums, and substitute them with measures that effectively encourage innovation;

→ publish the amounts distributed under the industry support programme as well as the results of the industrial strategies from previous periods;

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→ continue conducting assessments on the impact of the SME support framework to identify any gaps and overlaps.

Chapter 25: Science and research

Türkiye is **well advanced** in science and research. **Good progress** was made during the reporting period, confirmed by the High-Level Dialogue in November 2025. Türkiye continued efforts to raise awareness of, and increase capacity for, Horizon Europe.

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

→ ensure further improvements in the innovation pillar of Horizon Europe and European Innovation Scoreboard rankings.

Chapter 26: Education and culture

Türkiye is **moderately prepared** on education and culture. **Limited progress** was made during the reporting period regarding increased work-based learning opportunities and expanding evaluation and accreditation processes for universities.

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

→ ensure institutional autonomy and academic freedom safeguards in higher education, alongside further strengthening independent accreditation mechanisms; develop adult learning;

→ prioritise equitable access through early childhood education expansion, while improving inclusion, retention, and learning outcomes for vulnerable groups at all levels;

→ continue taking steps to implement the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions.

Chapter 29: Customs Union

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 Customs Union rules.

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

→ step up efforts to fully align new legislation with the Union Customs Code and bring risk-based controls and simplified procedures in line with the EU *acquis*, taking into account the progressive application of the new Union Customs Code;

→ strengthen controls and continue cooperation with the European Anti-Fraud Office (OLAF) in administrative investigations, e.g. in cases of transhipment or simple transformation of goods in the country that could lead to false declarations 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

Türkiye remains **moderately prepared** in the area of transport policy. **Limited progress** was made during the reporting period, particularly in the area of aviation. Türkiye's alignment

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with the EU transport *acquis* still presents gaps in road safety, rail liberalisation, as well as rail safety, 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 largely valid. In the coming year, Türkiye should in particular:

→ adopt and implement the transport decarbonisation roadmap, including measurable interim targets, monitoring tools and financing mechanisms for aviation, maritime, road, rail and urban mobility;

→ finalise alignment with the EU *acquis* on road infrastructure safety, smart tachographs, rail interoperability and rail safety, while improving enforcement and publishing implementation results;

→ operationalise the Sustainable Urban Mobility White Paper and strengthen multimodal transport, and alignment with EU passenger rights legislation, accessibility and central-local coordination, including in view of urban nodes under the revised TEN-T framework.

Chapter 15: Energy

Türkiye is **moderately prepared** in the area of energy. **Limited progress** was made on the renewable energy deployment and energy efficiency as well as further diversification of energy sources. Nonetheless, local content requirement practices in the renewable energy sector remained in place. No further legislative changes related to the natural gas market were adopted and the legislation does not yet ensure compatibility with the EU's third energy package. Energy dependency on Russia continued despite the energy diversification objective. Türkiye continued its efforts on the legislative alignment of nuclear safety regulations with EU and international standards.

The Commission's recommendations from last year were only partially implemented and therefore remain 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 and by updating the natural gas market law to ensure it is compatible with the EU's third energy package of 2009 and its update, the EU's 2024 hydrogen and decarbonised gas market package;

→ complete the legislative alignment with Euratom *acquis* and address the recommendations from the stress tests on the Akkuyu nuclear power plant before its entry into operation. Discontinue local content requirement practices in the renewable energy sector, as such practices contradict WTO and the EU-Turkey Customs Union rules;

→ further transition to targeted non-price measures to tackle energy poverty and provide economic relief to eligible households, to restore market-based retail pricing and remove disincentives to energy efficiency gains.

Chapter 21: Trans-European networks

Türkiye is **well advanced** in the area of trans-European networks (TEN). **Some progress** was made during the reporting period, in particular on taking concrete steps to mobilise investments for Yavuz Sultan Selim bridge railway connections. Türkiye continued to advance projects that contribute to the extension of the comprehensive trans-European transport networks (TEN-T) into its territory. Construction of the first phase of the Halkalı-Kapıkule railway line was completed and phase two and three advanced.

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

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→ establish a transparent, cost-reflective and non-discriminatory gas transit regime in line with the EU *acquis*;

→ take concrete steps to mobilise investments for increasing rail capacity of the Marmaray tunnel and optimising freight operations and enhance institutional capacity to prepare and implement TEN-T-compliant projects;

→ accelerate action to align with key pieces of the EU *acquis* to facilitate alignment in the trans-European transport and energy networks.

Chapter 27: Environment and climate change

Türkiye has **some level of preparation** on environment and climate change and made **some progress** over the reporting period, in particular on industrial emissions, waste management and climate change. Türkiye published its National Circular Economy Strategy and Action Plan together with the Single-use Plastics Roadmap in October 2025. Following the adoption of the Climate Law in July 2025, Türkiye published the related secondary legislation, including on the establishment of the national Emission Trading System (ETS), which ais yet to become operational.

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 (EIA) Directive and other horizontal environmental legislation, and ensuring that protection from exposure to asbestos in the earthquakes-affected areas is duly implemented;

→ complete alignment with the EU directives on industrial emissions water and waste as well as on nature protection and air quality, and ensure that protection from exposure to asbestos is duly implemented;

→ swiftly implement the Climate Law adopted in July 2025, in particular for emission trading, and further approximation with the EU ETS Directive; complete alignment with the wider EU *acquis* on climate action.

CLUSTER 5: RESOURCES, AGRICULTURE AND COHESION

Chapter 11: Agriculture and rural development

Türkiye has **some level of preparation** on agriculture and rural development. **Limited progress** was made in the reporting period. Notable improvements continued to be made on the implementation of the EU Instrument for Pre-accession Assistance for Rural Development (IPARD) III programme, with entrustment of a new measure (on Rural Public Infrastructure) and tangible progress in requesting entrustment of another new measure (on Advisory Services). The funds absorption rate remained high.

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 with the EU *acquis*;

→ set up and implement a farm sustainability data network (FSDN) and an integrated administration and control system (IACS);

→ 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

Türkiye is **moderately prepared** on fisheries and aquaculture. **Some progress** was made, in particular on resources and fleet management, with the adoption of the Fisheries Sector Policy Document 2025-2029. On inspection and control, the fisheries control capacity was further strengthened through the establishment of the new fisheries monitoring centre and the collaboration with the European Fisheries Control Agency in onboard inspection campaigns.

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 with European standards and adequate enforcement of monitoring, control, surveillance and inspection of fisheries in the Mediterranean Sea and strengthen efforts to effectively combat illegal, unreported and unregulated (IUU) fishing.

Chapter 22: Regional policy and the coordination of structural instruments

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

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

→ ensure proper functioning of local democracy and more balanced regional development;

→ address over-centralisation and structural weaknesses in the regional policy implementation;

→ improve monitoring and evaluation, and financial management arrangements focused on resource efficiency controls and long-term sustainability of EU-funded actions.

Chapter 33: Financial and budgetary provisions

Türkiye has **some level of preparation** in the area of financial and budgetary provisions. It made **no progress** over 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:

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

CLUSTER 6: EXTERNAL RELATIONS

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Chapter 30: External relations

Türkiye is **moderately prepared** on external relations. **Limited progress** was made in the reporting period, notably by lifting its longstanding objection for legal incorporation of the Investments Facilitation for Development Agreement into the World Trade Organization (WTO) rulebook.

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 national legislation on the screening of foreign investments with the EU *acquis* on the screening of foreign direct investments (FDI).

Chapter 31: Foreign, security and defence policy

Türkiye has **some level of preparation** on common foreign, security and defence policy, and made **limited progress** in the reporting period. Türkiye remained open to substantive exchanges with the EU. A number of EU-Türkiye consultations on foreign and security policy took place during the reporting period. However, Türkiye made no effort to improve its alignment with the EU's common foreign and security policy (CFSP), despite its stated strategic goal of joining the EU.

Türkiye continued to implement an active and multi-layered foreign policy, balancing its relations with key geopolitical actors and pursuing mediation and diplomatic efforts, while striving for strategic autonomy. Increasing geopolitical shifts have underscored Türkiye's growing strategic regional role and highlighted the shared interest and responsibility of the EU and Türkiye in addressing common challenges.

As regards Russia's war of aggression against Ukraine, Türkiye continued to emphasise its role as a facilitator and potential mediator, including by hosting direct talks between Russia and Ukraine in 2025. Türkiye did not align with the EU's restrictive measures against Russia, although it continued to partially cooperate with the EU to prevent their circumvention through Turkish territory.

On the Middle East conflict, Türkiye maintained a balanced position, made diplomatic efforts for de-escalating and ending the conflict, aligning with the EU's position on the need for a diplomatic solution to the Iran war and for restoring freedom of navigation in the Gulf/Strait of Hormuz.

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. Türkiye's position on certain issues, including Hamas, which is considered a legitimate political interlocutor by Ankara, cannot be reconciled with the EU's, which lists Hamas as a terrorist organisation. Türkiye's normalisation process with Armenia progressed during the reporting period.

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

→ urgently step up its efforts to detect and prevent the circumvention of the EU's restrictive measures. In particular, preventing the re-export, through the Turkish territory of Common High Priority items of EU origin and Economically Critical Goods; tackling 'false transit' and 'falsified certificates of origin'; and addressing risks linked to Russia's 'Shadow Fleet', particularly in relation to maritime and environmental safety. Reducing energy imports of Russian oil and gas also remains important in this context;

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→ urgently and significantly improve alignment with the High Representative's statements on behalf of the EU and relevant Council decisions on sanctions;

→ continue to engage in political dialogue on foreign and security policy with the EU seeking collaboration on convergent interests while working on reducing divergences, particularly to ensure de-escalation in the Eastern Mediterranean.

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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 democratic institutions in Türkiye remains a serious cause for concern. No steps were taken to address either the structural flaws of the presidential system or the inadequate separation of powers between the executive and the judiciary. Democratic backsliding continued, particularly in the areas of political pluralism, integrity of electoral process, the rule of law and local governance. Taken together, these factors raise increasing concerns over the country's respect for core democratic principles.

Elections

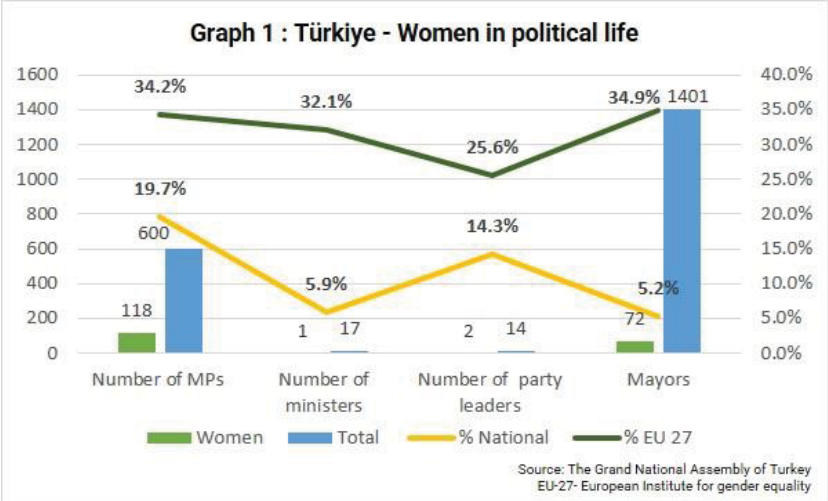
The main electoral framework allows voters to choose among competing political alternatives but falls short of ensuring a level playing field. Intensified judicial pressure on opposition figures and the Republican People's Party (CHP) – the main opposition party until its split in May 2026 after former CHP politicians established Yeni Parti (now the second biggest parliamentary represented party) – has further restricted the political opposition's ability to function and engage in political life without fear of intimidation. This pressure undermines fundamental democratic values and norms, such as political pluralism and freedom of association.

Istanbul mayor Ekrem İmamoğlu, who was widely regarded as the CHP's likely presidential candidate (now member of Yeni Parti), remains in detention. His trial, based on corruption charges which also target CHP district mayors and senior officials began on 9 March 2026. The indictment carries a sentence of up to 2 430 years in prison. In October 2025, the prosecution launched an espionage investigation against him and 14 other suspects for allegedly transferring personal data abroad. The administrative case filed to challenge the annulment of his university diploma was dismissed by the first instance court and is currently pending appeal. The related criminal case remains ongoing. Should such annulment be upheld, the mayor would be disqualified from standing as a presidential candidate.

In May 2026, an appellate court annulled CHP's 38th Congress of November 2023, as well as all subsequent ordinary and extraordinary congresses of the party. The removal of CHP leadership, more than two years after the regular Congress took place and after the Supreme Election Council had certified its results, reinforces concerns over the independence and impartiality of the judicial system. It also undermines the ability of opposition parties to operate without interference and participate in elections on equal footing with governing parties, raising questions concerning the integrity of the electoral process.

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The deficiencies in the legal framework governing elections and political parties have not been addressed. Türkiye has yet to implement any of the Organization for Security and Cooperation in Europe (OSCE)/Office for Democratic Institutions and Human Rights (ODIHR) recommendations, as well as those put forward by the Venice Commission. Türkiye also needs to ensure alignment with the Regulation on the transparency and targeting of political advertising.



Parliament

The President continued to exercise extensive authority across a broad spectrum of policy areas, thereby constraining the role of the Parliament. The frequent and persistent use of presidential decrees and executive orders curtailed the Parliament's capacity to perform its legislative and oversight function. Opposition parties had only limited influence over the parliamentary agenda-setting.

Parliamentary oversight of the executive continued to be limited and weak. While Members of Parliament may submit written questions to the Vice-President and ministers, the President is not covered by this scrutiny mechanism. In addition, standard presidential decrees remain beyond the scope of parliamentary review. There is also a pressing need to reinforce the legislature's scrutiny over public expenditure as recommended by the Venice Commission.

Judicial and administrative measures directed against opposition parties, in particular the increasing number of criminal investigations and legal actions targeted against CHP mayors (some of whom joined Yeni Parti) and party members, further contributed to a climate of intimidation.

Despite a binding judgment by the ECtHR calling for their immediate release, several former parliamentarians from the pro-Kurdish Peoples' Democratic Party (HDP), including two former co-chairs, remain in prison. A 2023 ruling by the Constitutional Court of Türkiye ordering the release of one of the defendants in the Gezi trial, who had subsequently been elected as a Member of Parliament, is yet to be implemented. Legal proceedings concerning the closure of HDP based on terrorism-related allegations remain ongoing. Pressure on the pro-Kurdish Peoples' Equality and Democracy Party (DEM) appears to have eased since the launch of the new Kurdish process in 2024.

Women continue to be markedly underrepresented in decision-making roles, both at national and local levels, and across the broader sphere of political life.

EU Integration

Türkiye has established institutional arrangements to effectively coordinate the accession process. The Directorate for EU Affairs at the Ministry of Foreign Affairs, together with its network of contact points across line ministries, is sufficiently resourced. The Directorate maintains effective cooperation with the EU Delegation and includes a communication unit responsible for outreach on EU enlargement.

Governance

Within the current presidential system, Parliament largely lacks effective instruments to hold the executive accountable. Presidential accountability remains largely confined to the electoral process. The executive maintains a broad degree of influence over all areas of the public administration, the judiciary, and security institutions. The President also has the authority to appoint senior leadership and board members across most key institutions and regulatory bodies. The public sector remains highly politicised. The recommendations set out in the Venice Commission's 2017 opinion on Türkiye's presidential system remain unimplemented.

Regarding **local self-governance**, the government continued to exercise high pressure on opposition mayors, through administrative, financial, and judicial channels. Judicial and administrative measures overwhelmingly targeted municipalities governed by the opposition, particularly those led by the CHP, with only two cases involving mayors affiliated with the Justice and Development Party (AK Party). The allegations brought forward included membership in terrorist organisations, corruption, and involvement in illicit financial activities, often supported up only by testimonies of secret witnesses. Concerns have been raised that, in some cases, various forms of pressure were used to intimidate mayors or councillors into switching their party allegiance to the AKP.

A report by the Venice Commission in October 2025 concluded that pre-trial detention of mayors may violate both the individual rights of the mayors and the political rights of the voters. Since 1 September 2025, 22 mayors from CHP have been suspended or arrested (bringing the total to 49 arrested and suspended mayors since the last local elections in 2024). In one case, a prison sentence was imposed. The appointment of trustees to replace the elected mayors and the selective denial of financial resources continued to be used as key pressure tools over opposition-led municipalities. A new law grants more powers to central government over the operations of companies set up by the municipalities.

Civil society

Civil society, including human rights defenders (HRDs), operates in an overall restricted environment and faces constant pressure and attacks as well as political, legal, financial and administrative constraints that hinder their effective functioning. Civil society actors working on women's rights, LGBTIQ+ issues, environmental protection, animal rights and human rights, in particular, continued to face pressure, including systematic administrative harassment and judicial prosecutions.

Public benefit status is granted in a discriminatory manner. Frequent audits are carried out in excessive and intimidating ways. Civil society organisations (CSOs) receiving funding from foreign donors and working on issues critical of government policies were subjected to frequent audits as well as hate rhetoric and smear campaigns.

Public consultations with independent CSOs on new legislation and policies remained very limited and ineffective and no formal mechanism exists for this process. Increasingly, government-organised or close to the government non-governmental organisations are attempting to displace civil society organisations from public debates and amplify government narratives.

HRD Osman Kavala and his co-defendants in the Gezi trial remained in prison despite the ECtHR rulings and numerous resolutions adopted by the Council of Europe's Committee of Ministers, including one in June 2026, and the ECtHR's Grand Chamber final judgement in August 2026 ruling that he must be released immediately. Despite the ruling, in October 2026, a Turkish court rejected Mr Kavala's application for release from prison. New judicial proceedings continued to be launched against journalists, HRDs, artists, and other individuals for their alleged participation in Gezi protests, over a decade since those events. Prosecutions for defamation, and especially for alleged insults against the President have a chilling effect on the civil society. HRDs continued to be targeted on spurious terrorism-related charges.

Cases concerning the administrative closure of CSOs and associations continued to be heard in the local and appellate courts. The case regarding the removal of Council Members of the Turkish Medical Association from their positions was dismissed. In January 2026, the Istanbul Bar Association's leadership was acquitted of charges of 'terrorist propaganda' and 'publicly disseminating misleading information'. After criticising rule of law developments, two former executives of the Turkish Industry and Business Association (TÜSIAD), including its former chair, were convicted in March 2026 for 'publicly disseminating misleading information' to 15 months and 18 days' imprisonment. The court deferred the announcement of the verdict on the condition that no further offences being committed during the probation period.

In February 2026, the Council of Europe Congress of Local and Regional Authorities youth delegate Enes Hocaoğulları was acquitted on charges of 'disinformation' and 'inciting people to hatred.' He had been arrested in 2025 because of the speech he gave at the Council of Europe, where he criticised the Turkish government.

Overall, the political, legal, financial and administrative constraints hindering the effective functioning of civil society organisations and representatives in Türkiye remained largely unchanged.

Civilian oversight of the security forces

Civilian democratic oversight remains limited due to the security forces' politicisation, weak public accountability, and insufficient parliamentary scrutiny. The executive branch holds extensive authority over the security forces, which include the Turkish Armed Forces, law enforcement agencies and the National Intelligence Organization, exceeding standard democratic civilian oversight.

Parliament lacks an effective oversight role over security agencies, the defence budget and off-budget expenditures. Strengthening cross-party parliamentary oversight of security and intelligence bodies remains a key reform priority.

Security institutions are increasingly perceived as politicised. Law enforcement agencies are often accused of selectively targeting opposition politicians, critical journalists, and civil society actors under the direction of prosecutors.

Systemic impunity within the security forces persists, with administrative protection shielding personnel from accountability in cases involving alleged human rights violations or excessive use of force. Judicial oversight is weakened by lengthy procedures and limited effectiveness.

Overall, civilian democratic oversight remains insufficient and requires stronger parliamentary scrutiny, greater transparency, improved judicial review, and safeguards for institutional independence and professionalism.

Situation in the east and south-east regions

The 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, continued to receive broad political support. The 51-member cross-party Parliamentary National Solidarity, Brotherhood and Democracy Committee (NSBDC), created to address the need for broader reforms following PKK's decision in 2025 to disband, provided a parliamentary platform for this process. The Committee's final report adopted in February 2026 by a qualified majority, offered a framework for the next legislative steps. The Committee provided formal, albeit limited, space for interaction between political and civil society actors.

A Framework Law on Strengthening National Solidarity and Social Cohesion was adopted on 10 August 2026. It establishes a mechanism that will apply once it has been verified that the PKK has effectively dissolved its organisational structure and surrendered its weapons. Under certain conditions, the law provides for the deferral of investigations, prosecutions and the enforcement of sentences in relation to specified organisation-related offences. Certain

serious offences, including intentional killing committed in the course of the organisation's activities, remain outside its scope. The legislation received relatively broad parliamentary support.

Nevertheless, important questions remain as to whether the process will subsequently extend to broader democratisation and fundamental rights issues. The NSBDC final report of February 2026 called for reviewing terrorism legislation, strengthening freedom of expression and ending the practice of appointing 'trustees' to municipalities. It also urged for full compliance with the rulings of the ECtHR and the Constitutional Court. It contained no explicit reference to the imprisoned PKK leader Abdullah Öcalan.

Overall, the peace initiative has inspired cautious optimism, leading to a more positive climate in the Southeast regarding freedom of assembly and exercise of cultural rights. However, it has not been evenly felt around the region and the country in general. Most Kurdish-language media outlets and cultural rights institutions remain closed since 2016. Newroz celebrations in March 2026 took place with limited interference in certain provinces like Diyarbakir while authorities imposed restrictions in other provinces. Over 200 detentions took place.

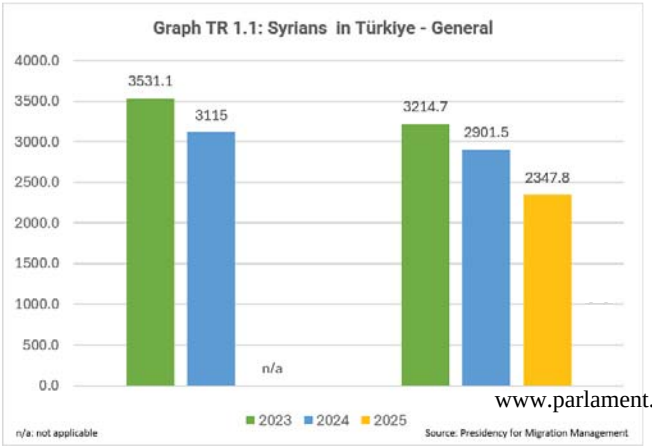
The government has the right and responsibility to combat terrorism. However, in doing so it should respect the rule of law, human rights and fundamental freedoms. Violations of human rights by security forces continued to be reported as well as hate offences and crimes against Kurds. The administrative remedies and judicial cases in relation to property rights cases in Diyarbakır and the region are still in court. The judicial and administrative pressures and practice of applying a broad interpretation of anti-terrorism laws to journalists, political opponents, bar associations and human rights defenders working on the Kurdish issue, are ongoing.

Ten DEM Party mayors and one CHP mayor in the East and Southeast remain dismissed and replaced by state-appointed trustees. The March 2022 recommendations issued by the Congress of Local and Regional Authorities of the Council of Europe regarding local democracy in Türkiye have yet to be implemented.

Three ECtHR judgments regarding former HDP Co-Chair Selahattin Demirtaş have yet to be implemented, and a new, 13th court case was filed against him in September 2025. The ECtHR judgment on Demirtaş is final. The case of the killing of Diyarbakir Bar Association Chair Tahir Elçi in 2015 is pending before the Constitutional Court.

Court cases related to government-funded construction projects on cultural, historical and religious heritage sites damaged during the military and security operations in 2015 and 2016 are ongoing. A comprehensive approach to addressing the issue of missing persons or to independently investigate alleged extrajudicial killings by security forces remained absent. To date, all cases related to enforced disappearances from the 1990s have resulted in acquittals or have been dropped due to statutes of limitation rules. The village guard system, which is one of the key obstacles in the Kurdish issue, continued to obstruct the return of displaced villagers.

Overall, there has been no progress on the situation of **internally displaced people** due to violence in the Southeast region during the 1990s and in more recent years. People displaced after the February 2023 earthquakes continued to encounter major challenges.



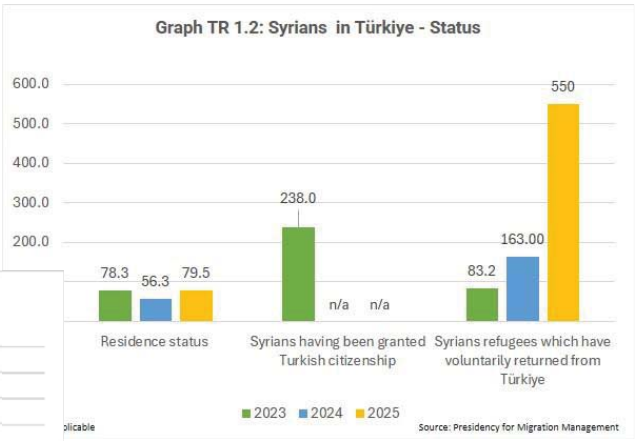
Refugees

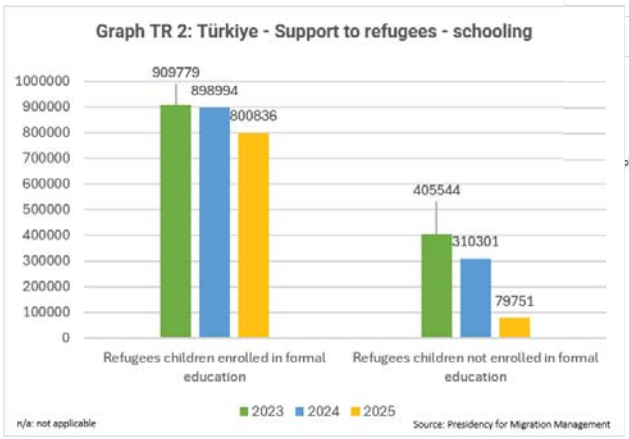
Türkiye continues to host one of the largest refugee populations in the world. As of September 2026, official figures show that there are 2 218 101 Syrians under temporary protection and 87 321 Syrians holding short-term residence

permits. However, Türkiye does not regularly publish comprehensive data on the number of refugees residing in the country.

According to a statement by the national authorities, 772 944 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 1 462 758 as of August 2026. Additionally, the Ministry of Interior announced that, in April 2026, Türkiye hosted 133 600 people under international protection, mostly Afghans, Iraqis, and Iranians. As of September 2026, there were 1 276 758 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 healthcare services, supported by the EU. In January 2026, an amendment to the Temporary Protection Regulation came into effect, requiring temporary permit holders to make healthcare payments similar to Turkish citizens and international protection holders to access healthcare. Temporary permit holders are required to make such co-payments unless they fall under specific vulnerability criteria established in the regulation (disability, single parenthood, or absence of working-age household members). Temporary permit holders with work permits or private insurance can use their health insurance coverage.





While the structural barriers for the formal labour market integration of the refugees still exist, socio-economic development projects under the EU's refugee assistance have continued to address these problems by improving skills, supporting job creation via entrepreneurship and SME support, and empowering the capacities of the relevant government institutions. By the fourth quarter of 2025, over 200 000 refugees and host community members received employment counselling, 118 349 registered for vocational skills training, 103 493 completed training, 18 149 obtained a vocational certificate, 87 881 were registered with İŞKUR and 37 389 jobs were created by enterprises established or expanded with EU support.

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 2025 was 800 836. A significant number of refugee children (79 751) were not enrolled in formal education in the academic year 2025-2026 (a reduction from 310 301 in 2024). An average of approximately 1.2 million refugees received monthly cash assistance throughout 2025.

The EU has repeatedly called on Türkiye to resume returns of irregular migrants from the Greek islands 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 44 213 by March 2026.

2.1.2. Public administration reform

Strategic framework for public administration reform

Türkiye continues to lack a strategic framework for public administration reform. Decision-making remains heavily centralised which leads to limited autonomy of ministries, agencies and local governments. Political commitment to advancing reforms remains limited. While elements of reform appear in annual government programmes and various sectoral policy documents, these remain fragmented and do not amount to a coherent and holistic public administration policy reform perspective.

Policy development and coordination

Policy development and coordination mechanisms still need to be developed. The Presidency does not have detailed procedural rules for the preparation and adoption of policies. Policymaking and legislative processes still make limited use of evidence-based approaches, regulatory impact assessment and participatory mechanisms and often are marked by top – down decisions, weak transparency and limited scrutiny. The link between policy planning and budgeting remains weak, and public institutions do not make sufficient use of *ex ante* and *ex post* evidence in their decision-making.

Public financial management

The legislative **framework** for public financial management (PFM) is broadly in place, but its implementation needs to be strengthened.

On **budget management**, the medium-term economic programme and the annual budget fall short of effectively guiding public finance planning, as significant deviations from planned targets occur. The efficiency of the public expenditure system, accountability and financial transparency need to be improved. A gender-responsive planning and budgeting approach remains largely absent. Monthly budget execution data are published but highly aggregated, limiting possibility for external analysis. Public participation in the budget process is minimal. Parliamentary scrutiny of the budget and capacity to examine audit reports remain limited, weakening transparency and oversight. The Türkiye Wealth Fund remains unaccountable (*See Chapter 32 on financial control*).

No dedicated **public investment management** (PIM) framework is in place. Türkiye lacks a systematic, cross-government methodology for the appraisal, selection, prioritisation and monitoring of public investment projects. Capital spending decisions continue to be driven by political considerations rather than evidence-based cost-benefit analysis, resulting in inefficiencies in project selection and implementation. The post-earthquake reconstruction effort has further exposed the absence of an institutional architecture capable of managing large-scale public investment in a transparent and accountable manner. The Presidency of Strategy and Budget coordinates investment planning functions, but its remit remains fragmented and its outputs are not integrated with the budget cycle in a binding manner.

Türkiye should develop and adopt a comprehensive PIM framework, establishing clear institutional responsibilities, mandatory project appraisal standards, and a centralised public investment pipeline linked to multi-year budget programming.

Budget transparency remains insufficient. While the Presidency and the Ministry of Treasury and Finance publish monthly budget execution data, the level of disaggregation is limited, constraining external analysis and civil society scrutiny. Budget documentation does not systematically provide multi-year projections at programme level or performance indicators linked to expenditure. Information on tax expenditures, contingent liabilities and off-budget operations, including those channelled through public banks and state-owned enterprises, is incomplete and not consolidated in a publicly accessible format. A comprehensive PFM strategy, which would provide the overarching framework for addressing transparency and accountability gaps across all of these areas, has yet to be developed or adopted.

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Public service and human resources management

The public service and human resource management is outdated and requires substantial reform. The state continues to be perceived as an attractive employer, in particular due to regulated employment conditions and a high degree of job security. However, the legal framework for civil servants does not sufficiently guarantee neutrality, merit-based recruitment and promotion, undermining the effectiveness of public services. Senior civil servants' appointments lack clear and objective criteria, making them vulnerable to favouritism and political influence. Politicisation of the civil service, across different branches of the administration, including at managerial levels, remains a concern. As of July 2026, there were more than 5,417,126 public employees, representing 16.5% of total employment. Around 43 % of public-sector employees are women. However, women remain significantly underrepresented at senior levels.

Accountability of administration

The accountability of administration is insufficient. The political accountability of ministers rests with the President, while effective parliamentary oversight mechanisms over the Presidency are still lacking.

Supervisory bodies, including the Ombudsman, internal control and audit institutions, lack independence and capacity.

Civil servant accountability is hindered by the requirement for ministerial authorisation to prosecute officials. Broad access-to-information exemptions and the absence of proactive disclosure further restrict transparency.

Service delivery to citizens and businesses

The service delivery to citizens and businesses still needs to be improved. Public services are generally accessible; however, major gaps persist in both their quality and availability. The absence of an administrative procedure law hinders compliance with good administrative practices. There is no central policy or coordination mechanism aimed at improving service quality across the public sector. Progress has been made in expanding e-services through the e-Government Gateway. Türkiye continues to face vulnerabilities in the areas of personal data protection and cybersecurity.

2.2. RULE OF LAW AND FUNDAMENTAL RIGHTS

2.2.1 Chapter 23 - Judiciary and fundamental rights

The core values of the EU include the rule of law and the protection of human rights. Ensuring an independent, effective, and high-quality judiciary, alongside a firm commitment to combating corruption, is crucial. Equally important is the consistent safeguarding of fundamental rights in both law and its implementation.

Functioning of the judiciary

Strategic documents

The Judicial Reform Strategy for 2025-2029 and the 12th Judicial Reform Package adopted in July 2026 continue to be implemented. While some measures provided in the new Judicial Reform Package may contribute to procedural efficiency, it largely focuses on the functioning and speed of the judiciary rather than addressing longstanding critical shortcomings regarding judicial independence, impartiality and safeguards for fundamental rights. Concerns were also raised that expanding single-judge proceedings and restricting avenues of appeal could weaken judicial safeguards in some cases. The absence of adequate consultation processes, coupled with the continued use of omnibus legislation (the practice of combining, sometimes only loosely related measures, into a single legal act), hinders

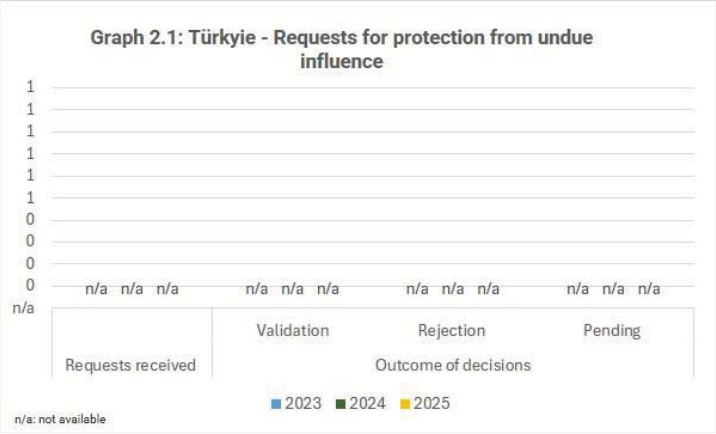
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effective drafting and adoption, which in turn undermines the overall quality and effectiveness of legal texts.

Management bodies

The judicial management bodies are in place, but their composition continues to raise structural concerns. No steps were taken to address the concerns regarding the Council of Judges and Prosecutors (HSK), Türkiye's highest judicial administrative authority, which is composed mainly of political appointees and has no peer-elected members. The strong influence of the executive in appointing HSK members continues to undermine the judiciary's independence. In addition, HSK members do not have full security of tenure or functional immunity. The HSK has shown limited engagement with core problems in the judiciary, including low-quality indictments and judicial reasoning, non-compliance with procedural rules, and the frequent use of pre-trial detention. Moreover, its decisions are still not 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 need to be improved at both higher and first-instance levels. Executive influence persists through the composition and functioning of the HSK, while the Ministry of Justice continues to oversee judicial selection. The HSK's failure to address allegations of politically motivated proceedings, particularly against opposition figures, journalists, and civil society members, as well as its failure to implement rulings of the ECtHR and the Constitutional Court, undermines its credibility and Türkiye's international legal obligations.

Government assurances on judicial independence are undermined by statements from senior political and judicial figures about pending cases, which risk interference by signalling expected outcomes and legitimising punitive judicial rulings.

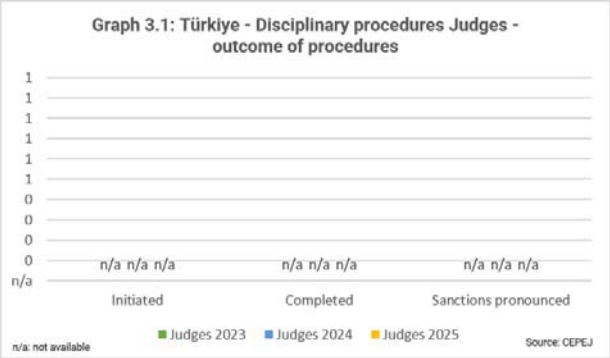
Judicial proceedings against opposition politicians, often involving charges including 'insulting public officials', 'terrorism-related offences' and 'corruption or abuse of office,' have become regular occurrences. High-profile cases, including the arrest and indictment of the Mayor of Istanbul and the annulment of the CHP Congresses, have deepened concerns about the independence of the judiciary. The Grand Chamber of the ECtHR ruled in August 2026 that the violations found in the Kavala vs Türkiye case reveal structural shortcomings which 'are likely to facilitate the exertion of direct or indirect influence by the executive branch on certain judicial decisions, particularly in cases with a sensitive political dimension'. The Grand Chamber also stressed that criminal proceedings should not be instrumentalised for purposes other than the impartial administration of justice.

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The judicial appointments, promotions and transfers, continue to be a concern. The lack of public reasoning for HSK decisions, combined with opaque reassignments of judges from cases, remains a concern and fuels perceptions of politicisation. Similarly, promotion patterns, such as appointments to higher courts or specialised jurisdictions are not always clearly linked to publicly available, merit-based criteria, which also contributes to perceptions that career advancement may depend, on alignment with institutional or political positions.

Accountability

The accountability of the judiciary did not improve. The effectiveness and the transparency of asset declarations by the judiciary needs to be improved. Judges and prosecutors are required to declare their assets when assuming office, every five years, and upon leaving office. The legal framework aims to prevent misconduct, corruption and abuse of power among the judiciary and high-ranking officials. However, credible media reports alleging corruption by high-ranking officials raise concerns whether accountability mechanisms work effectively when the accused are politically exposed individuals. There is limited public information on how complaints against judges are examined, dismissed or pursued.



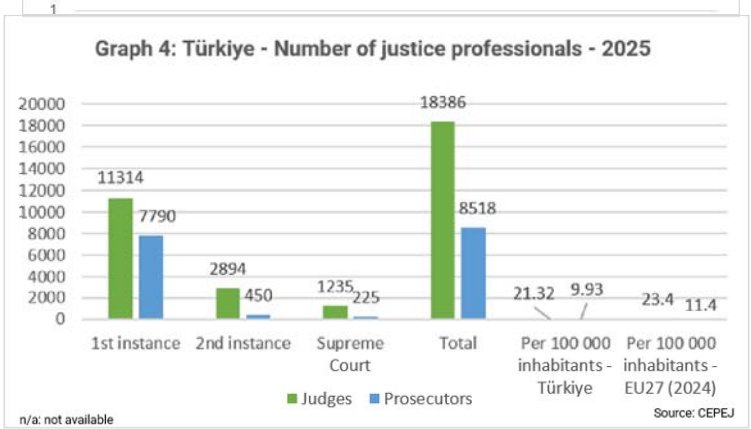


The Ministry of Justice Inspection Board exercises extensive inspection, examination and investigation powers within the justice system. Its authority covers, *inter alia*, the administrative functions of chief public prosecutors and prosecutors, judicial commissions, enforcement offices, prisons and detention centres, forensic medicine institutions, notaries and bar associations. While the Inspection Board constitutes an important mechanism, questions remain concerning its institutional and functional independence from the executive. Transparency also remains an issue. A clear distinction therefore needs to be maintained between legitimate administrative oversight and matters that could infringe upon the independence of the judiciary.

Quality of justice

The quality of justice needs to be improved and continues to face systemic shortcomings**,** particularly in indictments drafting, evidence collection and judicial reasoning**.** Indictments often lack clear legal reasoning while broad legal texts grant prosecutors and courts wide discretion in interpreting laws. Concerns persist regarding inconsistent implementation in practice. Concerns related to the anti-terror legislation and implementation remains. In August 2026, the Grand Chamber of the European Court of Human Rights (ECtHR)

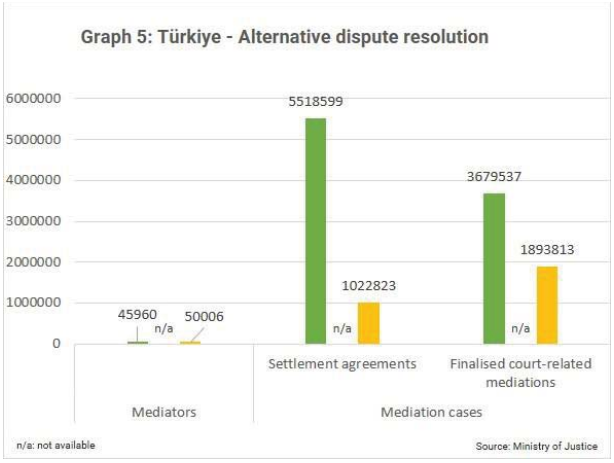




ruled that there is a 'systematic problem of prosecution and imprisonment of human-rights defenders, political opponents and journalists for criminal offences, the scope of which is extensively interpreted or artificially magnified'.

In high-profile proceedings, defence rights are frequently compromised, and defence lawyers themselves have also faced detention and arrest, undermining the right to legal representation and the principle of equality of arms. Media leaks on cases have also raised concerns regarding the presumption of innocence. Serious concerns also persist regarding the use of anonymous witnesses who cannot be cross-examined which interferes with the right to a fair trial. In some reported cases, similar witness testimonies have appeared across multiple proceedings, raising questions about their reliability. There are concerns that, in certain instances, statements obtained from informants or witnesses may have been taken under coercion, as alleged by the witnesses themselves. These practices undermine the integrity of the judicial process and are not in line with the jurisprudence of the ECtHR.

According to data from the Ministry of Justice and the HSK, the number of judicial personnel serving in the judicial and administrative courts approached 26 765 as of February 2026, up from 23 800 in 2023. The Justice Academy of Türkiye continues to provide training for judges and prosecutors. However, as it is overseen by a president appointed directly by the President of Türkiye, questions remain regarding its institutional independence.

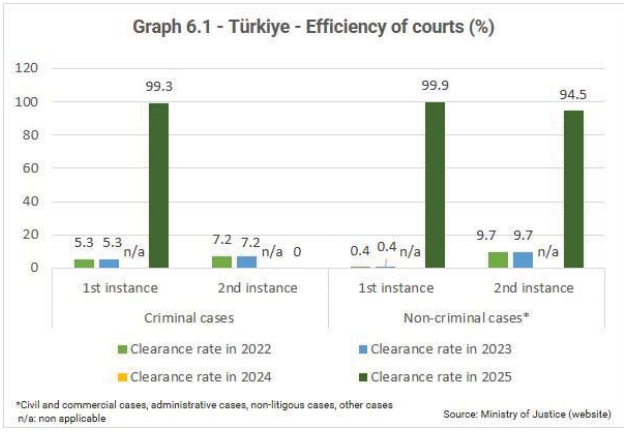


Alternative dispute resolution (ARD) mechanisms are increasingly available and used with mediation in particular. Mandatory mediation as a precondition for litigation has been extended to a broad range of labour, commercial and consumer disputes. The ADR has the potential to facilitate faster and less costly resolution of disputes and to alleviate the considerable workload of the courts. However, there are concerns that the continued expansion of mandatory mediation might create an additional barrier to effective access to justice. Despite the increased use of ADR mechanisms, lengthy proceedings and substantial court backlogs remain a concern, including in commercial justice. Further efforts are therefore needed to ensure the quality and effectiveness of mediation, appropriate professional standards and supervision, and greater transparency and data on outcomes.

Efficiency

The efficiency of the judicial system needs to be improved, particularly in addressing the significant backlog of cases and length of legal proceedings. Of particular concern is the delays in issuing indictments combined with the widespread use of pre-trial detention.

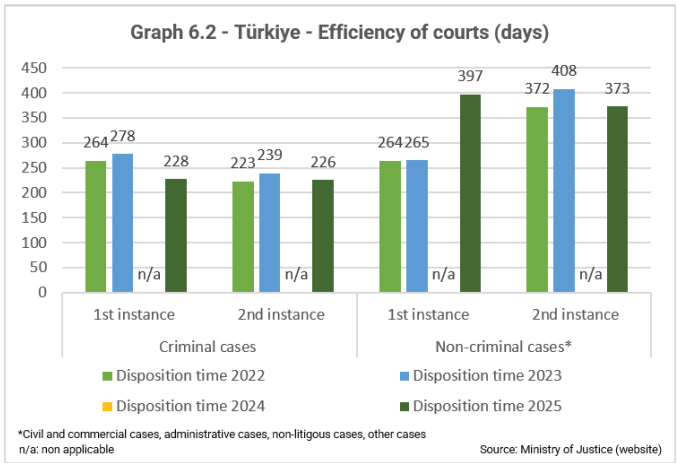
Data from 2025 indicates to improved case-processing capacity, but with significant differences between jurisdictions and continuing challenges concerning the duration and accumulated cases. In fact, high case clearance rates alone do not necessarily indicate that existing backlogs have been eliminated or that individual cases are decided within a reasonable time.



Delays in issuing indictments can be attributed to several factors, including the investigations' broad scope, lack of sufficient evidence in the indictments, the slow pace of evidence-gathering processes and judicial authorities' heavy workload. In addition, in certain politically related cases, delays may also reflect a deliberate preference by the authorities, which further intensifies concerns. Frequent transfers of judges and prosecutors also affect continuity in proceedings. Similarly, the appointment of relatively inexperienced personnel to complex criminal courts can further slow proceedings.

The budget allocated to the justice system increased in 2026 to EUR 6.9 billion (TRY 390 billion), up from EUR 5.88 billion (TRY 280 billion) in 2025.

The National Judiciary Informatics System (UYAP) remains the backbone of the digital justice infrastructure, providing electronic access to a range of judicial services and enabling data exchange between courts, prosecution services and other public institutions. The use of digital tools further increased in 2025, including through the expansion of e-hearings, while SEGBİS, the audio-visual information system, continued to be widely used, particularly in criminal proceedings. There are certain concerns regarding the use of SEGBİS in criminal trials where defendants are required to participate remotely rather than being physically present in the courtroom, particularly in terms of effective participation in proceedings, direct communication with the court and the exercise of defence rights. The 2025-2029 Judicial Reform Strategy also places emphasis on the use of artificial intelligence in the judiciary.



The effective implementation of court decisions remains a concern. While judgments are generally implemented in ordinary proceedings, problems persist in politically sensitive and high-profile cases, particularly regarding the implementation of judgments of the Constitutional Court and the ECtHR. Instances of delayed, incomplete or non-implementation of binding judgments undermine legal certainty and the principle of the rule of law.

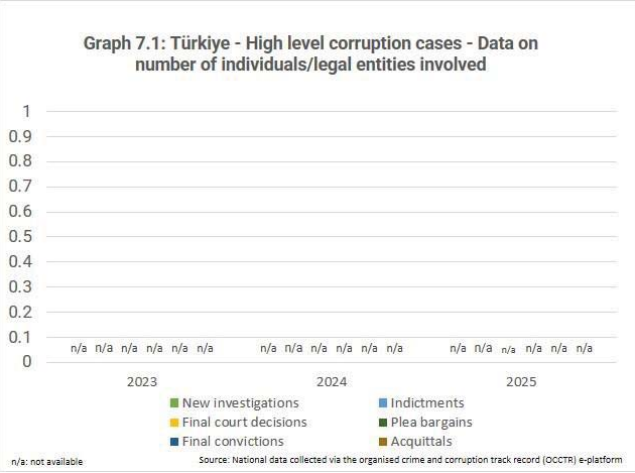
Fight against corruption

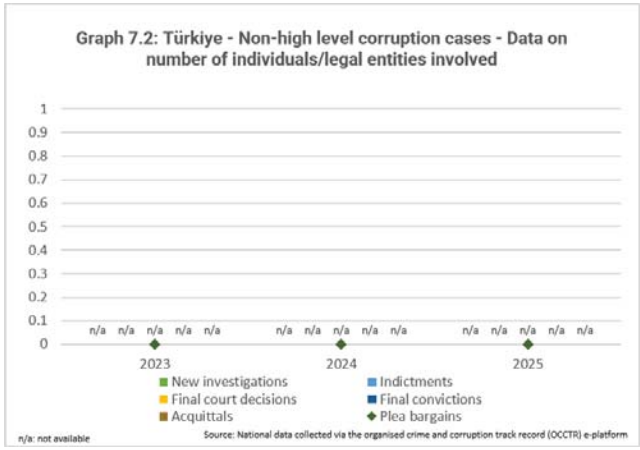
Track record

The track record of investigations, prosecutions and convictions in corruption cases **needs significant improvement.** Despite several high-profile corruption cases against opposition politicians, the perception of corruption remains extremely high. According to Transparency International's Corruption Perceptions Index (2025), Türkiye's score reflects a continuous decline in the perception of public sector corruption since 2012. In 2025, Türkiye ranked 124th out of 182 countries, placing it in the lower tier globally in terms of perceived corruption. Collaboration between audit and inspection units and prosecution offices remains arbitrary and insufficient. Administrative scrutiny of corruption seems politically motivated, as investigations mainly target mayors and local politicians from the opposition parties.

As of April 2026, following the March 2024 local elections, the Ministry of Interior reported conducting 3 224 administrative reviews based on complaints, reports, and special inspections. Investigations were launched in 1 298 cases. Of these, 591 concerned AKP municipalities, 321 CHP municipalities, 102 MHP municipalities, 6 İYİ Party municipalities, 18 DEM Party municipalities, and 260 municipalities from other parties. Although 46% of investigations concerned AKP controlled municipalities, prosecutions appear to be launching criminal charges predominantly against CHP municipalities. In a rare move, in 2026, the prosecution launched an investigation against a former Ankara mayor, who is member of the ruling AKP.

Türkiye recorded increased investigative and prosecutorial activity in 2025 in relation to three corruption offences: embezzlement, bribery and misuse of public duty. Between 2024 and 2025, the total number of new investigation files concerning these offences increased by 6.6%, with particular raise in bribery and misuse of public duty investigations. Over the same period, the number of files resulting in public prosecution increased by 8.0%. Court-level results were less positive. Although the number of adjudicated defendant records increased by 4.6% between 2025 and 2024, convictions increased by only 0.8% in the same period, and the calculated conviction share declined from 18.2% to 17.5%. By offence, convicted defendants increased from 571 to 614 for embezzlement and from 495 to 580 for bribery, but declined from 1,725 to 1,620 for misuse of public duty, making bribery the clearest area of improvement. Overall, the data indicate greater investigative and prosecutorial activity, but do not demonstrate a corresponding improvement in sanctioning outcomes.





Frequent exceptions in procurement procedures undermine the integrity of public procurement. Political financing, the judiciary, public administration, municipalities, land administration, zoning and construction continue to be vulnerable to corruption.

Legal framework

Türkiye is a party to all international anti-corruption conventions, including the UN Convention against Corruption. It has not introduced new anti-corruption legislation or reforms to fulfil these obligations. The legal framework for whistleblower protection and public procurement is not aligned with the EU *acquis*, particularly in the areas of exemptions, concessions, and public-private partnerships.

Corruption-related provisions in the Penal Code continue to have shortcomings. The definition of active bribery in the Criminal Code does not meet international standards, particularly regarding bribery in the private sector. Legal privileges for public officials continue to obstruct anti-corruption investigations.

The legal framework on conflicts of interest, asset declarations and financial oversight of political parties remains insufficient. Türkiye has no legislation governing lobbying.

Strategic documents

Türkiye does not have a national anti-corruption strategy or action plan. No progress has been made in implementing long-standing GRECO recommendations on corruption prevention in respect of Members of Parliament, judges and prosecutors. These include reforms to improve legislative transparency, introduce a parliamentary code of conduct, manage conflicts of interest, enforce asset declaration rules, limit parliamentary immunity and provide confidential ethics training. More than 10 years after the adoption of GRECO's Fourth Round Evaluation Report on Türkiye, only 3 of the 22 recommendations in the report have been fully implemented.

GRECO has repeatedly highlighted significant shortcomings in Türkiye's political financing framework, particularly concerning transparency of party and campaign funding. There are also significant shortcomings on the limited effectiveness of independent oversight and audit mechanisms. GRECO has also underlined that transparency regarding Members of Parliament remains limited in Türkiye, particularly in relation to asset declarations, conflicts of interest, and the effective verification of declared information. It has also expressed concern that similar shortcomings apply to the judiciary, where disclosure requirements and safeguards for independence and integrity are not sufficiently robust or consistently enforced. Despite persistent and credible claims on alleged corruption, no legal steps have been taken to strengthen the framework for preventing corruption or to enhance integrity among Members of Parliament, the judiciary, and the prosecution service.

Institutional framework

Türkiye still lacks a permanent and independent anti-corruption body. Coordination between various preventive bodies remains weak. The legal framework for addressing corruption in the private sector remains inadequate. Regular public awareness campaigns on transparency and anti-corruption are lacking.

There are no specialised law enforcement units, prosecution services or courts exclusively devoted to fighting corruption. The executive continues to exercise undue political influence over the judicial police in corruption investigations. Inter-agency cooperation and information sharing between law enforcement and the Financial Crimes Investigation Board (MASAK) need to be strengthened.

Fundamental rights

General framework

The implementation and enforcement of fundamental rights is insufficient and continued to deteriorate in the reporting period. Türkiye needs to urgently align its human rights framework with European standards, notably the ECHR, the case law of the ECtHR, and the recommendations of the Venice Commission. This includes anti-terrorism legislation, and freedom of expression related provisions of the Turkish Penal Code and their implementation. The broad and disproportionate application of anti-terrorism legislation continues to exacerbate the situation. Long-standing human rights issues remain unaddressed, including the arrest and prosecution of activists and journalists, the selective application of legal provisions against journalists, activists and opposition politicians, and persistent restrictions on media freedom.

International human rights instruments

Cooperation with international human rights monitoring bodies and the follow-up to their recommendations has remained limited. While Türkiye is a party to numerous international human rights instruments, both its domestic legal framework and its implementation continue to fall short of full alignment with the ECHR and the jurisprudence of the ECtHR.

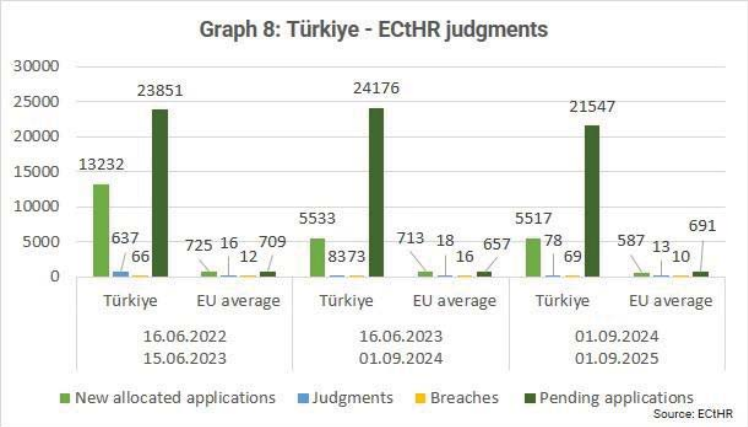
The Parliamentary Assembly of the Council of Europe maintains Türkiye under its monitoring procedure, reflecting ongoing concerns regarding compliance with human rights standards.

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Turkish authorities' use of charges based on broad definitions such as 'spreading misleading information to the public' or 'insulting the president or other government officials' raised concerns about the potential chilling effect on civic participation and freedom expression.

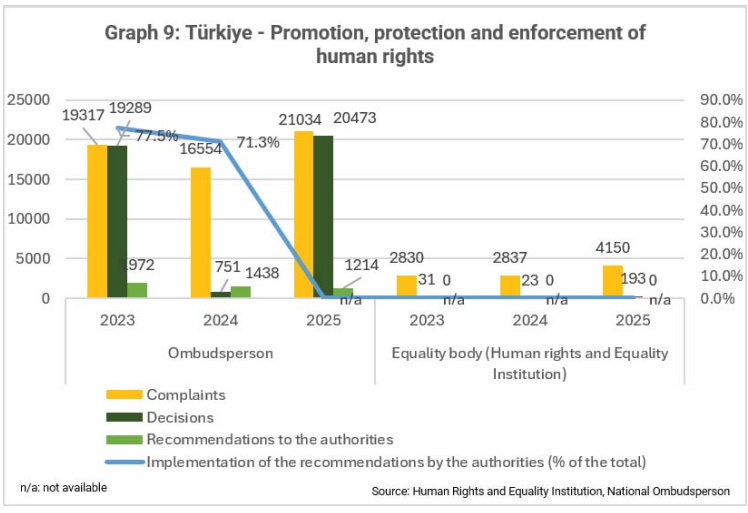
European Court of Human Rights

The implementation of ECtHR judgments remains inadequate, a problem underlined by a ruling of Court's Grand Chamber delivered in August 2026. Türkiye still has not implemented certain ECtHR rulings and the related judgments of its own Constitutional Court. During the reporting period, the ECtHR delivered 37 judgements against Türkiye. The Court found breaches of the European Convention on Human Rights relating mainly to the right to a fair trial, right to liberty and security (including reasonableness pre-trial detention), prohibition of torture, respect for private and family life, and freedom of expression. Currently, there are 213 cases under enhanced supervision by the Committee of Ministers on similar breaches of the ECHR (205 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 needs to address systematic issues such as judicial independence, judicial review mechanism, use of excessive force by security forces, unjustified detention, and the right to a fair trial.



Promotion, protection and enforcement of human rights

The legal and institutional framework for the promotion, protection and enforcement of human rights remains inadequate and requires further strengthening.



The 2021-2023 Human Rights Action Plan expired, limiting the availability of a coherent policy framework to address persistent shortcomings in the human rights field.

The effectiveness of Türkiye's Human Rights and Equality Institution (HREI) and the Ombudsperson Institution remains limited. The HREI's legal and institutional framework has yet to be brought into full alignment with the Paris Principles. No steps were taken to either strengthen the institutions' operational, structural or financial independence, or establish transparent and merit-based appointment procedures for their members. Financial and human resources should be allocated to both bodies to secure their adequacy.

Despite the high volume of complaints submitted, there is little evidence of systematic follow-up or meaningful institutional impact. Activities continue to focus predominantly on non-sensitive or technical matters, with limited visible involvement in cases involving serious

allegations of fundamental rights violations, particularly where such cases may carry political implications.

The HREI has increased visits to removal centres used for the administrative detention of irregular migrants and has made some complaints with the public prosecutor's office. This may be seen as a step toward engagement in a more sensitive area. However, the scope, depth, and transparency of these reports remain limited. This restricted scope of engagement overall continues to contribute to persistently low levels of public trust.

Türkiye still lacks a national action plan clarifying the public authorities' responsibilities in preventing and addressing human rights violations linked to business activities. No substantial steps have been taken to align the domestic framework with the EU Corporate Sustainability Due Diligence Directive. The absence of a comprehensive legal and regulatory framework in this area leads to gaps in corporate accountability for human rights abuses.

Right to life

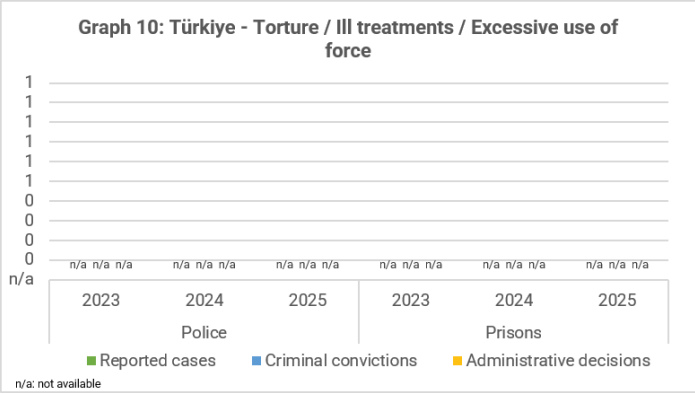
Concerns regarding accountability for alleged violations of the right to life in the context of security operations persist. No significant new measures were taken to ensure effective investigation or accountability for past extrajudicial killings and forced disappearances. There is also no meaningful progress in addressing both historical and more recent allegations involving excessive use of force by security personnel. In a significant development in 2026, the investigation on the case of a university student who disappeared before six years in the eastern Turkish province of Tunceli was reopened and considerably broadened on the basis of new evidence. A former Tunceli Governor and several other suspects, including public officials and individuals linked to the former governor, have also been detained or arrested as part of the expanded investigation. The failure to launch the investigation until 2026, exemplifies broader structural shortcomings in Türkiye's approach to such cases, particularly in cases involving perpetrators with close ties to authorities. Following this case, authorities have declared that they will resume investigations concerning unresolved cases of possible forceful disappearance of women or femicides.

Prevention of torture and other forms of ill-treatment

Türkiye lacks adequate legal and administrative safeguards to prevent torture and ill-treatment. Cases of torture and ill-treatment continue to be reported. Mechanisms for effective investigation and follow-up of such cases remain insufficient. While prosecutions were launched against officials in a limited number of cases, they remain insufficient in both scope and effectiveness. Credible allegations of abuse by prison personnel continue to go unaddressed. Instances of torture and ill-treatment were particularly reported during the January and February protests related to attacks against Kurds in Syria, especially in southeastern provinces. On other occasions, some journalists faced court cases and investigations on their reporting on torture allegations. There were also several reports on allegations of torture and ill-treatment of migrants and refugees in removal centres.

The ECtHR ruled against Türkiye in March 2026 on violation of the prohibition of torture in the case of an academic who was sprayed with tear gas at very close range by police during the Gezi Park protests in 2013.

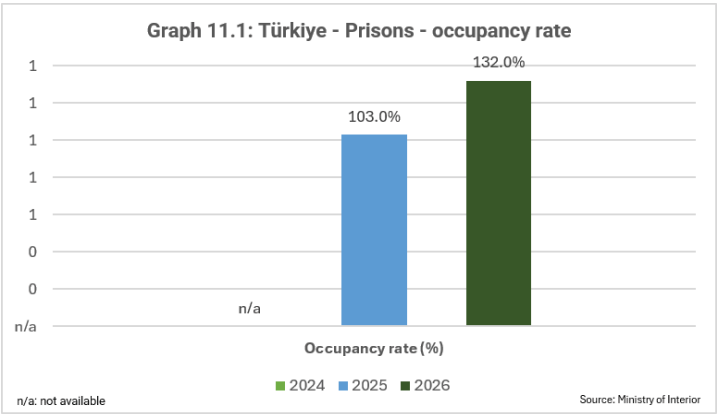
Türkiye should allow the publication of the report on the 2025 visit carried out by the European Committee for the Prevention of Torture and Inhuman or Degrading Treatment or Punishment (CPT) to several prisons and detention centres to assess the treatment and legal safeguards provided to the persons detained during the protests in March 2025. Türkiye should allow the publication of all outstanding reports by the CPT and establish procedures for their automatic release in line with its international transparency and reporting obligations.



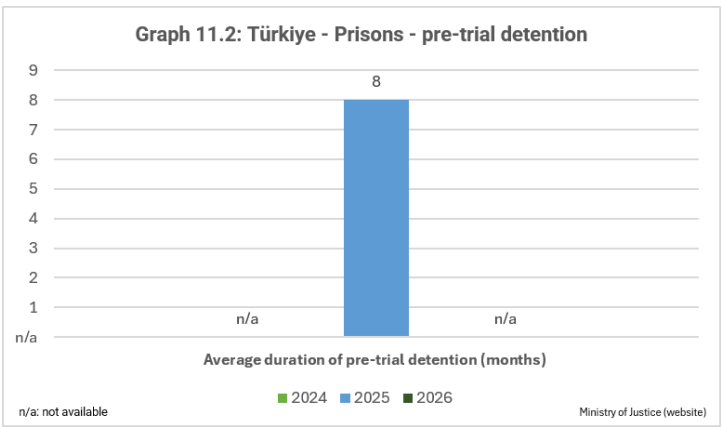
Impunity in cases of torture and ill-treatment constitutes one of the most significant barriers to the prevention of torture in Türkiye. Despite Türkiye's obligations under the Optional Protocol to the UN Convention against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment (OPCAT), no progress was made in aligning the HREI, in its capacity as the National Preventive Mechanism, with the Protocol's core requirements.

Türkiye should take meaningful steps to strengthen the protection of the right to life and to enhance safeguards against torture and ill-treatment. The requirement to obtain prior authorisation for the prosecution of public officials, including law enforcement personnel, should be revised or abolished in order to address systemic impunity and reinforce accountability.

Execution of criminal sanctions



The system for the execution of criminal sanctions, including probation, continues to require improvement. Turkish prisons continue to operate above their capacity, which worsens structural problems, such as overcrowding, inadequate physical conditions and restricted access to basic services and resources. The widespread and frequent use of pre-trial detention persists.



The 11th Judicial Reform Package introduced amendments concerning early release mechanisms and certain procedural aspects of criminal execution, but these do not extend to individuals convicted on political grounds. Their practical impact to date has remained limited and has not led to a sustained reduction in prison overcrowding or a comprehensive improvement in detention conditions.

Concerns persist regarding the decisions of Prison Administration and Observation Boards, which continue to influence conditional release procedures in an arbitrary fashion.

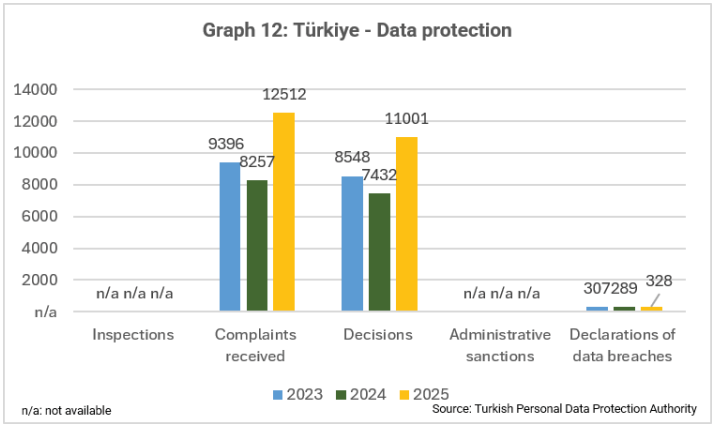
Reports of human rights violations in prisons and detention centres continue to highlight issues such as unequal treatment of certain categories of inmates, including political prisoners, as well as persistent shortcomings in access to healthcare, education, rehabilitation and reintegration programmes. Restrictions on communal activities as a way of administrative punishment are also reported in some facilities. In high-profile cases, including involving Istanbul Metropolitan Municipality officials, members of opposition parties and CHP-affiliated defendants, serious concerns have been reported regarding the treatment of defendants during detention and judicial proceedings.

The Forensic Medicine Institute's role has also been subject to criticism, with concerns expressed regarding the weight given to its reports in determining detention conditions and fitness for release.

Protection of personal data

The legal framework for the protection of personal data is insufficient and the capacities of the data protection agencies need to be improved.

Türkiye's Personal Data Protection Authority (KVKK) fails to comply with the EU *acquis* and meet European standards. Its operation is based on the 2016 Personal Data Protection Law, which lacks key principles such as data subject rights, the scope of exemptions, institutional independence and effective enforcement mechanism.



During the reporting period, no substantive legislative amendments were adopted to address the main structural gaps in alignment with the General Data Protection Regulation (GDPR). Concerns also persist regarding the operational independence and effectiveness of the KVKK. Questions persist on KVKK's consistency of its enforcement practices, the transparency of decision-making and the adequacy of deterrent sanctions, particularly in cases involving public authorities and law enforcement bodies. Further improvements are needed to strengthen institutional independence, enhance enforcement capacity and ensure the effective protection of personal data in line with European standards.

Freedom of thought, conscience and religion

Türkiye maintains a generally adequate legal framework for the protection of freedom of thought, conscience and religion. While freedom of worship is largely upheld, shortcomings persist about the broader enjoyment of freedom of thought, conscience and religion.

The Venice Commission's recommendation to allow the Greek Orthodox Ecumenical Patriarch to use the title 'Ecumenical' continues to not be implemented consistently. The lack of legal personality for the non-Muslim and Alevi communities and their worship places remains an issue. The Venice Commission's recommendations to grant legal status to non-Muslim religions have yet to be implemented.

In May 2026, the ECtHR ruled that clergymen of the Ecumenical Patriarchate should be allowed to seek election to the administrative boards of Greek Orthodox Vakıflar (pious foundations). 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. Jehovah's Witnesses and

other conscientious objector groups who refuse military service are subjected to repetitive prosecutions, fines, and imprisonment. Foreign Protestant pastors and Jehovah's Witness ministers continued to be deported or denied entry into the country based on dubious 'security codes'. An ECtHR judgment is pending on this issue.

A circular issued by the Ministry of National Education (MoNE) in February 2026 to implement Ramadan activities at schools again triggered debate over secularism and pluralism in education system. The Minister of Education initiated legal proceedings against intellectuals and civil groups who initiated a declaration on secularism. MoNE has renewed protocol with a youth foundation, granting it access to thousands of public schools during the summer break to promote religious-related courses, despite a previous annulment of a similar protocol by the Council of State.

Atheists and agnostics face discrimination, stigmatisation, social pressure, or restrictions on their right to education. The Turkish education system does not guarantee neutrality and impartiality towards various religions, denominations and beliefs. No measures were taken to address the shortcomings identified by the ECtHR in compulsory religious culture and ethics classes. During the reporting period, children from protestant families were required to choose one of the four Sunni elective courses in schools, despite being entitled to an exemption.

No steps were taken to reopen the Halki (Heybeliada) Greek Orthodox Seminary, which has remained closed since 1971. The UNESCO World Heritage Committee's concerns about the Hagia Sophia and Chora museums having been converted into mosques remained unaddressed. The active Christian churches in the Hatay province are still in ruins due to lack of state funding since the 2023 earthquake. High-level officials and 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 and media freedom

Türkiye provides insufficient legal guarantees for freedom of expression, while restrictions undermine a free, independent, and professional media environment.

Intimidation of journalists

The environment for journalists and media outlets remained restrictive, with ongoing arbitrary arrests, detentions, prosecutions and convictions. These were often based on broadly defined offences, including disinformation, defamation, and terrorism-related charges and for reporting on corruption allegations related to the government and state institutions. In October 2025, Tele1 TV was seized after its editor-in-chief's arrest in an espionage probe, and a trustee was appointed. In October 2026, following the launch of a criminal investigation against the chairman of Halk TV, the Savings Deposit Insurance Fund (TMSF) seized the company, appointed trustees and took the channel off the air. As a result, the space for independent media has been dramatically reduced.

Pre-trial detention and judicial control measures, including travel bans abroad, remained widely used, contributing to a chilling effect on freedom of expression. Physical intimidation and pressure on journalists covering protests and politically sensitive developments persisted. Online harassment and smear campaigns targeting journalists, particularly women journalists, also continued.

Between September 2025 and September 2026, according to CSOs working in media freedom 74 journalists and media workers were arrested, imprisoned, or remained in pre-trial detention. (51 in the same period in 2024-2025).

Legislative environment

Anti-terrorism, national security, public order, disinformation, and public morality legislation remained misaligned with international and EU standards. Access to information also continued to be restricted, often on national security grounds.

The 11th Judicial Package, adopted in November 2025, introduced shortened pre-trial detention periods. The package did not address the broad scope and application of criminal provisions frequently used to restrict freedom of expression. As a result, concerns persist regarding the lack of safeguards against arbitrary interference.

Türkiye's Law on Cybersecurity, adopted in March 2025, was amended in July 2026 increasing the institutional and operational role of the Cybersecurity Presidency. The provisions grant the presidential body broad new powers to order measures affecting internet access, services and infrastructure. Telecom operators, access providers and other online platforms must comply with such orders, while a judge could review them after implementation, thereby increasing the risk of disproportionate interference.

No steps were taken during the reporting period to align with the EU Anti-SLAPP legal framework.

Implementation of legislation/institutions

The enforcement of existing legislation still does not align with European standards and remains selective and discriminatory. The Radio and Television Supreme Council (RTÜK) continued to lack independence and impartiality, frequently imposing fines, broadcasting bans, and content removal orders under vague justifications such as 'contrary to national and moral values', 'general morality' or 'protection of the family', often in a discriminatory manner. Media outlets and websites continued to be 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. The disinformation law is disproportionately used to obstruct journalists. The combined use of criminal and administrative measures, and informal pressure has reinforced a culture of self-censorship and further undermined media pluralism.

Public service broadcasters

Concerns continue over the lack of impartiality of the public broadcaster Turkish Radio and Television Corporation (TRT). During the coverage of politically sensitive developments, including investigations involving opposition-led municipalities, TRT's reporting predominantly reflected official government narratives. This has reinforced concerns regarding the broadcaster's failure to ensure balanced and pluralistic news coverage, particularly during periods of political tension.

Economic factors

The media market in Türkiye remains highly concentrated, with significant cross-ownership between media and business conglomerates. Thus, media ownership is controlled by few economic players that have close ties to the government. This concentration has reinforced concerns regarding editorial independence. Independent outlets, or outlets owned by religious minority groups, receiving no public advertisements which allocations continue to be perceived as lacking transparency and predictability. Rising operational costs, limited access to advertising markets, regulatory fines, and judicial pressures collectively undermine media's financial viability.

Internet

Legislation still fails to guarantee an open and unrestricted internet, granting administrative authorities significant powers to order content removal in urgent cases without prior judicial review. Accordingly, the government requested the closure of hundreds of X accounts belonging to journalists, political figures, women's groups, youth groups and activists, often

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in the absence court orders based on broad legal grounds such as ‘national security,’ ‘public order,’ or ‘defamation.’ The increasing obligations imposed on platforms, as well as the growing responsibilities of hosting providers and social media companies, encourage a more cautious approach and, at times, an over-removal tendency.

Between June and September 2026, access was blocked to more than 100 social media accounts and URLs belonging to or associated with LGBTIQ+, feminist and human rights organisations and activists, further restricting online space for human rights defenders and LGBTIQ+ expression and advocacy. The Minister of Justice underlined that this was done in line with the 2026–2035 Decade of the Family and Population vision.

In April 2026, a law which amends the existing framework on social media platforms, child protection and social services included significant digital regulatory measures, that may lead to further content restrictions beyond the stated objectives.

Overall, the balance between freedom of expression and considerations of public order and security has shifted against freedom of expression.

Freedom of artistic expression

Vague legal provisions such as ‘morality,’ ‘insult to religion’, ‘insult to president’ or ‘public order’ are often used to restrict freedom of artistic expression. Artistic events and performances keep being prosecuted, banned, and artists critical of government policies faced derogatory remarks from high-ranking officials and pro-government media. An arts manager, representing leading artists in Türkiye, faces charges of ‘aiding an attempt to overthrow the government’ during the 2013 protests more than decade after the events. These restrictions stifle cultural and creative expression, lead to self-censorship, and in turn further narrow the space for critical voices.

Professional organisations and working conditions

The working conditions for journalists in Türkiye continue to deteriorate with low wages, a high risk of prosecution, limited trade union rights and no job security (*see also Chapter 10*).

Freedom of assembly and association

Türkiye provides insufficient legal guarantees to freedom of assembly and association, and regulation of assemblies is restrictive. The overall environment remains repressive, with a persistent pattern of selective implementation of the law and disproportionate interference by the authorities.

Legislation remains inconsistent with European standards and falls short of guarantees provided also in the Turkish Constitution and needs to be amended in line with the case law of the ECtHR, the Constitutional Court, and existing international frameworks.

Freedom of association of trade unions, opposition political parties, mainly the CHP which saw its Congresses annulled and leadership removed by a Court ruling, and rights-based CSOs have further deteriorated during the reporting period.

Provincial governorates continued to impose blanket bans, dispersals by law enforcement or administrative restrictions on public gatherings and demonstration, and maintain a consistently intolerant stance towards demonstrations and marches organised by groups perceived as critical of the government. By contrast, assemblies that are supportive of the government are generally permitted to proceed without hindrance and, in some cases, appear to benefit from facilitation and protection by the authorities. This selective approach has also been evident during March 2026 Newroz celebrations and International Women’s Day during which detentions and arrests took place.

Most active groups on the ground, including independent women's movement, LGBTIQ+, environmental, animal rights activists and human rights defenders and trade unionist continued to face challenges. These include frequent police intervention, disproportionate use of force during dispersals, administrative fines, and judicial proceedings. On 1 May celebrations at least 575 people were detained on grounds of 'non-authorised demonstrations' in Taksim Square.

Overall, the authorities enjoy a high degree of discretion, coupled with a lack of consistency, in the enforcement of freedom of assembly and association. Moreover, a pattern of differential treatment exists based on the perceived political alignment of organisers of gatherings.

Property rights

The legal framework for enforcing property rights is mostly in place. However, some legislative shortcomings persist, in particular on property rights for non-Muslim minorities. The court cases regarding the land ownership of the Mor Gabriel Syriac Orthodox Monastery are pending before the Constitutional Court. Syriac citizens' individual property cases and court cases regarding the 2016 expropriations in Diyarbakır's Sur district continued. The property rights of people who lost their lands and immovables in the February 2023 earthquakes need to be urgently addressed, also in view of arbitrary expropriations by the government. There are no comprehensive restoration plans for cultural and religious heritage destroyed during the earthquake, especially in Hatay. Council of Europe Resolution 1625/2008 on property rights on the islands of Gökçeada (Imbros) and Bozcaada (Tenedos) remains valid and unaddressed.

Non-discrimination

The legal and institutional framework on non-discrimination is incomplete, and the capacities of existing equality bodies need to be substantially improved. No progress has been made on 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 increased pressures on the LGBTIQ+ community is of particular concern.

Anti-racism and hate offences

The legal and institutional frameworks on anti-racism and hate offence are incomplete and implementation and enforcement is insufficient. Türkiye has not made any progress in revising its non-discrimination legislation to align it with the EU *acquis* and European standards, including the Racial Equality Directive and the Directives on standards for equality bodies. Hate speech based on sexual orientation does not fall within HREI's mandate.

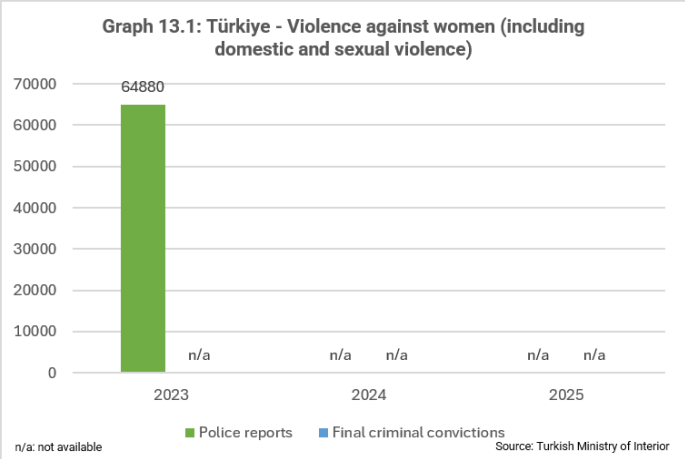
Existing legislation on hate offences, including hate speech, are still not in line with the EU *acquis* and European standards, failing to provide victims with adequate legal protection from bias-motivated crimes. Hate crimes against Kurds, Christian and Jewish minorities, Alevis and Syrians continued.

Gender equality

The legal and institutional framework on gender equality and combating gender-based violence is incomplete and implementation and enforcement are insufficient. Despite the presence of a comprehensive legal framework, policy documents and services, problems in gender equality, cases of violence against women (including femicides), political support for restrictive social norms continue to be a cause of major concern in Türkiye.

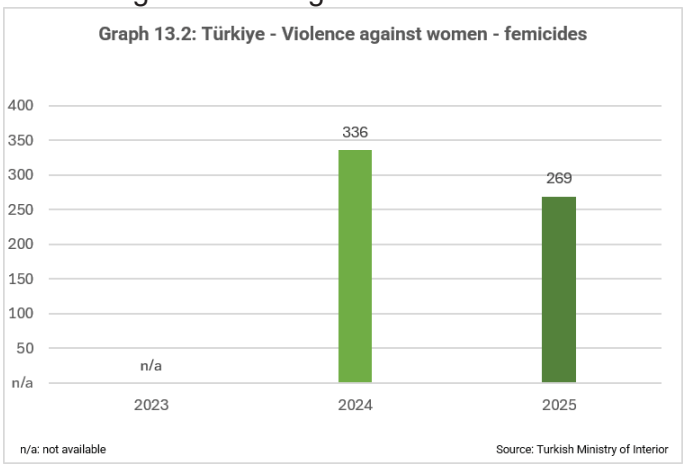
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The increasing government policy emphasis on traditional family roles, demographic objectives and narratives challenging gender equality risks further undermining progress on gender equality and women's rights and continue to raise serious concerns. The 2024 Vision Document for Strengthening the Family, which portrays gender equality as a major threat to the family institution, continues to be implemented.



Türkiye's withdrawal from the Istanbul Convention in 2021 continues to represent a significant setback in the protection of women from gender-based violence. Since then, serious concerns persist regarding the implementation of the Law on the Protection of the Family and the Prevention of Violence against Women, with reports indicating that it is no longer effectively implemented in practice and that, in some instances, its proactive provisions are rendered largely inoperative by the authorities. However, there is a strong demand for a return to the Istanbul Convention in the Turkish society, and the political and social debate on this continue.

Recent policy developments include the adoption of the Fifth National Action Plan on Combating Violence Against Women (2026-2030) in November 2025. It includes measures on prevention, protection and support pillars, specialised support services, perpetrator programmes and improved institutional coordination. However, further efforts are needed to align the legal and policy framework with the EU *acquis*, including Directive (EU) 2024/1385 on combating violence against women and domestic violence, and relevant European standards.



In June 2026, Türkiye's Constitutional Court has annulled the legal rule allowing indefinite poverty alimony after divorce. This decision is set to come into force after nine months after the ruling.

Femicide remains a serious concern, while discrepancies between official and civil society data highlight persistent shortcomings in comprehensive and reliable data collection. Women's access to justice and specialised support services remains insufficient, particularly for migrant and refugee women. Women's rights centres and legal aid offices within the bar associations provide free legal assistance to victims. However, delays in processing legal aid requests often result in a critical loss of time. The availability of shelters remains insufficient, and the effective implementation of protection orders needs to improve.

Rights of the child

The legal and institutional framework on the rights of the child remains incomplete, and its implementation and enforcement are insufficient. The legislation and practice are still not fully aligned with both international standards and the EU *acquis*.

Despite the 2023–2028 Child Rights Strategy and Action Plan, significant implementation gaps persist, including in addressing violence against children, child labour, barriers to girls' education and child and forced marriage. The best interests of the child are not yet systematically applied in practice.

The child protection system continues to face shortcomings, particularly regarding children deprived of parental care and those in institutions. Further efforts are needed to strengthen prevention, monitoring and support and to accelerate the transition towards family- and community-based care. The school shootings in April 2026 also highlighted shortcomings in prevention, risk assessment and psychosocial support in educational settings.

The school shootings that took place in April 2026 further highlighted critical shortcomings in child protection and school safety policies. The absence of comprehensive preventive measures, risk assessment mechanisms, and psychosocial support systems in educational settings point to significant gaps in the governments' response.

Significant shortcomings persist in child-friendly justice. Access to specialised legal aid and child-sensitive procedures remains insufficient, as does independent monitoring. Specialised juvenile courts and adequately trained justice and child protection professionals remain insufficient. Free legal aid is available to children in criminal proceedings but remains limited in civil proceedings and other complaints mechanisms. Children continue to be subject to investigation, detention and prosecution under the Criminal Code and anti-terrorism legislation, including in relation to freedom of expression and peaceful assembly. Reports of physical and psychological ill-treatment in detention raise serious concerns regarding safeguards for children deprived of liberty.

In August 2026, Parliament adopted amendments to the Child Protection Law and other laws**,** introducing custodial sentences for children convicted of serious offences and strengthening sanctions concerning the use of children by criminal organisations. The stronger reliance on custodial sentences and harsher sanctions raised concerns regards the principles of proportionality, deprivation of liberty as a measure of last resort, at the expense of rehabilitation, reintegration and the best interests of the child.

Persons with disabilities

The legal and institutional framework on the rights of persons with disabilities is incomplete and implementation and enforcement are insufficient. Türkiye is partially aligned with the European Accessibility Act, but significant gaps remain, including as regards digital services, private sector compliance and enforcement mechanisms. Further efforts are needed to ensure accessibility in practice.

Türkiye has designated bodies to implement and monitor the UN Convention on the Rights of Persons with Disabilities (UNCRPD). However, a fully independent monitoring framework in line with the Convention is not yet in place. The National Action Plan on the Rights of Persons with Disabilities (2023-2025) has not been extended. Further efforts are needed to implement the UNCRPD.

Persons with disabilities continue to face barriers to exercising their legal capacity on an equal basis with others, including due to the existing guardianship regime. The disability assessment system is not yet aligned with the WHO's International Classification of Functioning, Disability and Health protocols and remains insufficiently oriented towards a functional and human rights-based approach to disability.

Although the legal framework provides for reasonable accommodation, implementation remains uneven, including in public services and employment.

Further efforts are needed to prevent institutionalisation and accelerate the transition towards independent living and inclusion in the community, including through accessible, person-centred community-based support services, in line with the principles of the Commission Guidance on independent living and inclusion in the community of persons with

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disabilities in the context of EU funding is a tool that needs to be taken into account Children with disabilities continue to face gaps in early identification, referral and access to appropriate support services.

LGBTIQ+ persons

The legal protection of the rights of LGBTIQ+ persons remains insufficient. LGBTIQ+ persons continue to face discrimination, restrictions to their fundamental freedoms, hate speech and stigmatisation.

Government policies and public discourse increasingly reinforce negative stereotypes against LGBTIQ+ persons. The government's 2024-2028 Vision Document and Action Plan for Strengthening the Family include narratives portraying LGBTIQ+ identities as a threat to family and societal values. Inflammatory rhetoric by public officials and state institutions, together with the policy emphasis on the 'Year of the Family', further contributed to the stigmatisation and marginalisation of LGBTIQ+ persons.

Freedom of assembly and civic space for LGBTIQ+ persons and organisations deteriorated further. In 2026, the Pride March in Istanbul was officially prohibited. In September 2026, a country-wide series of judicial, law-enforcement and digital operations were carried out against LGBTIQ+ persons, activists, civil society organisations, and human rights defenders, resulting in numerous investigations and arrests on allegations of spreading 'obscene' materials, violations of the Law on Associations, as well as prostitution and drug-related charges. According to the Minister of Justice, judicial proceedings were under way against 162 suspects, nine associations and 13 businesses., Most of the affected CSOs are well-established organisations with long history of activity.

Reportedly, MASAK examined several associations active in the field of the rights of LGBTIQ+ persons that had reportedly received funding from foreign sources. The donors concerned included EU Member States, trans-national CSOs and independent grant-making organisations. Although no allegations of criminal activities were made, the scrutiny of the activities and foreign funding of LGBTIQ+ organisations risks creating a chilling effect on legitimate civil society activities and access to funding. In December 2025, the Young LGBTIQ+ Association was closed down by a local court in İzmir, on grounds of 'obscenity' based on social media posts. The case is now before the appeals court.

Transgender persons continue to face barriers in accessing gender-affirming healthcare. The Turkish Medical Association (TMA) requested clarification from the Turkish 'Medicines and Medical Devices Agency' after reports that patients undergoing gender-affirming hormone therapy faced barriers in the e-prescription system. Trans refugees cannot access any therapy or medicine due to cumbersome procedures. The government's attempt to introduce legislation further restricting the rights of -LGBTIQ+ persons, although ultimately withdrawn from the 11th Judicial Reform Package, remains a cause for concern.

Procedural rights of suspects and accused persons and rights of victims of crime

The legal framework on procedural rights, as well as on the rights of victims of crime, remains incomplete.

Significant inconsistencies with the EU *acquis* and European standards remain in law and in practice. Procedural rights and safeguards are often not effectively accessible or implemented. Reports indicate ongoing challenges related to access to case files, timely and effective legal representation and equality of arms during proceedings. Prolonged periods of pre-trial detention remain a structural concern. Persistent issues also include the use of evidence that may be unreliable or obtained in breach of procedural safeguards. In particular, the continued reliance on testimony from anonymous or secret witnesses–without adequate opportunities for cross-examination by the defence–remains problematic. In several cases, including those brought against the Mayor of Istanbul, concerns have been raised regarding both the manner in which evidence is gathered and the absence of a clear

and substantiated link between the evidence presented and the accusations set out in indictments.

Further efforts are still required to ensure full alignment of national legislation with the EU *acquis*, in particular the Victims' Rights Directive and the Compensation to Crime Victims Directive. Access to justice for victims remains uneven in rural areas and among disadvantaged groups, where awareness of available legal aid and support services continues to be limited. Persons with disabilities face systemic barriers in access to justice and in the full exercise of their legal capacity.

The Judicial Support and Victim Services Department significantly expanded its reach, increasing the number of Judicial Support Directorates to 175 across 81 cities by end of 2025.

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. Hate speech and hate crimes continued, with Syrians, Greeks, Armenians, Jews and Alevis being the main targets.

The main public events for the Armenian Genocide Commemoration Day were prohibited by the İstanbul Governorate in April 2026. The court case concerning the retrial of state officials involved in the murder of Armenian journalist Hrant Dink is still pending before the Court of Cassation.

Overall, persons belonging to minorities continued facing 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 a handful of minority media outlets and complications in enjoying property rights. No progress was made in the revision of school textbooks to remove discriminatory and derogatory references. Minority schools received no public funding.

There are still no effective mechanisms to include persons belonging to minorities in decision-making or ensure their fair representation in public administration. Minorities are seriously underrepresented in political life and public service. The separate regulation required to enable board elections in the four minority foundation hospitals has not been adopted, and the 2023 Constitutional Court ruling, which found a violation of freedom of association remains unenforced.

Ministry of National Education inspectors conducted checks at minority schools focusing on 'guest students'. Armenian schools were verbally informed that they would no longer be permitted to admit students from Armenia, while the status of those already enrolled was also reviewed. Greek and Jewish minority schools were also reportedly included in the inspections.

Cultural rights

Legal restrictions on mother-tongue education in primary and secondary schools persist. While state schools offer optional courses in two Kurdish dialects and a few other minority languages, these are subject to strict requirements, including a minimum of 10 students per class and suffer from a shortage of qualified teachers. Six universities continue to offer faculty courses and provide degrees in Kurdish-language education.

Roma[6]

[6] 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.

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The 2023-2030 National Roma Strategy and its Action Plan continue to be implemented. Concrete measures are needed to address direct discrimination and entrenched prejudices.

Overall, Roma communities face a self-reinforcing cycle of structural inequality in the labour market, driven by discrimination, informal economy, limited access to services, and underrepresentation, all of which perpetuate marginalisation and social exclusion. The 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 has not been 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 inside the EU. There is also cooperation in the fight against serious and organised crime and terrorism, and judicial, police and customs cooperation, 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.

General framework

Legal alignment, strategic and institutional frameworks

A national strategy (2022-2027) and an action plan (2025-2027) against organised crime are in force and coordinated by the Ministry of Interior. There is no efficient reporting system which complicates the monitoring on the implementation of the action plan. The 11th Judicial Reform Package, adopted in December 2025, increased maximum sentences for managing and participating in criminal organisations as well as child exploitation for criminal purposes.

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

Türkiye has not established a dedicated, centralised asset recovery office. Asset seizure and confiscation are managed through general criminal justice procedures. The Savings Deposit Insurance Fund (TMSF/SDIF) has a legal mandate to manage assets seized under court orders.

Türkiye does not currently have a national equivalent to SOCTA (Serious and Organised Crime Threat Assessment). The 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.

Legislation on witness protection provides protective measures but its effectiveness and capacity remained limited. The scope of the law on witness protection needs to be expanded to cover all types of serious crime and procedural rules need improvement. No progress was made in this area during the reporting period.

Implementation and enforcement capacity

Turkish authorities reported that 552 organised criminal groups were dismantled in the first ten months of 2025. Regarding confiscation of criminal assets in corruption and organised crime cases, between 1 September 2025 and 9 April 2026, the Gendarmerie took action against 628 suspects involved in 116 incidents. Sanctions imposed by the UN led to the freezing of assets belonging to a total of four individuals while no entity was designated by the UN under ISIL (Da'esh)/Al-Qaida regime in 2025 and 2026. The transposition time of the UN sanctions has improved.

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The operational capacity of law enforcement agencies continued to be strengthened through new recruitment and training programmes. Concerns persist about the capacity of the country's law enforcement authorities to effectively handle cases of gender-based violence and to provide adequate protection and support to victims.

The Savings Deposit Insurance Fund is increasingly entrusted with companies and assets linked to the proceeds of crime in investigations including in some high-profile cases. Türkiye should ensure that these measures remain firmly grounded in judicial decisions, proportionate, subject to clear time limits and overseen by effective and independent safeguards. By the end of 2025, the TMSF had 1 123 companies under its control, holding assets worth 361.2 billion of Turkish lira.

Law enforcement cooperation

A total of 14 EU Member States have liaison officers in Türkiye. Cooperation with the EU Agency for Law Enforcement Training (CEPOL), Eurojust, Europol and Interpol continued but, in most cases, remains limited and needs to be increased. A cooperation agreement with CEPOL is in place and during the reporting period Türkiye significantly increased activities through the agreement.

Strong operational cooperation takes place with Interpol. Cooperation with Europol remains limited to the existing Strategic Cooperation Agreement, as Türkiye's data protection framework is not aligned with the EU *acquis*, preventing the exchange of personal data. However, Türkiye could intensify sharing data with Europol within the existing legal framework, as Europol may receive information from third parties where relevant for the performance of its tasks. Türkiye has two liaison officers at Europol. In 2025, as a result of Operation 'Bulut' in coordination between the EU Member States and Türkiye, and supported by Europol, five major drug-related criminal networks were dismantled disrupting major drug trafficking organisations.

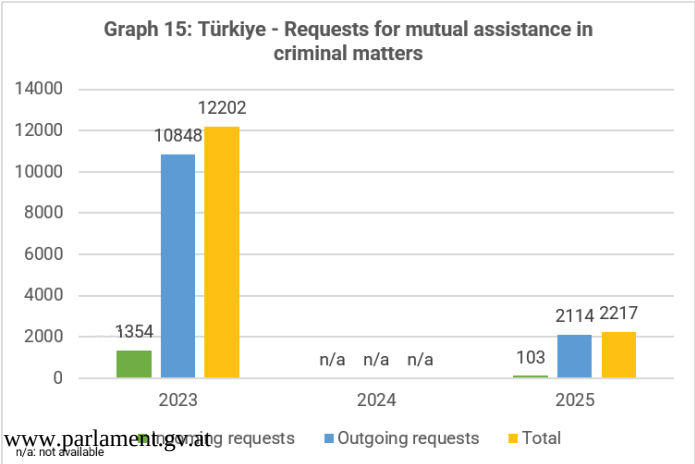
While Türkiye has national coordination structures and participates in the European Multidisciplinary Platform Against Criminal Threats (EMPACT), enhanced participation is encouraged. After months of disengagement, Türkiye has been involved in a limited (eight) but targeted number of EMPACT actions addressing migrants smuggling, firearms and drug trafficking. While it did not contribute to the Most Threatening Criminal Networks and Individuals (MTCNI) operational action plan (see the section on drugs), Türkiye showed a good level of engagement under the migrants smuggling operational action plan.

Türkiye is connected to use SIENA (Secure Information Exchange Network Application) but is one of the least active users. To establish a sustainable professional development, Türkiye is encouraged to adopt the sectoral competencies and integrate knowledge acquired through CEPOL capacity-building actions to its law enforcement training system.

Judicial cooperation in criminal matters

The legal framework for judicial cooperation in criminal matters is partially aligned with the EU *acquis* to the extent that alignment is already possible. Judicial cooperation in criminal matters needs to be improved to meet European standards. An international agreement with the EU on cooperation with Eurojust is not in place. Between September 2025 and March 2026, Türkiye was involved in seven new cases at Eurojust, most related to fraud, money laundering and organised crime.

Türkiye has yet to ratify the European Convention on the Compensation of Victims of Violent Crimes. In 2025, the EPPO did not send any requests for mutual legal assistance to the authorities of Türkiye but it had 10 active cases



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with links to Türkiye at the end of the same year.

In its capacity as Member State, Türkiye participated in both the Council of Europe's Committee on Crime Problems (CDPC) and in its Committee of Experts on the Operation of European Conventions on Cooperation in Criminal Matters (PC-OC).

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.

Crime areas

Investigation and criminalisation of money laundering

The 2026–2030 Strategy Document on Enhancing the Effectiveness of Anti-Money Laundering, Counter-Terrorism Financing and Confiscation Practices was adopted on 4 July 2026.

Türkiye's report from FATF's fifth round of mutual evaluations was adopted in June 2026. Overall, Türkiye is rated compliant or largely compliant with most FATF recommendations.

On Immediate Outcome 7 (Money Laundering Investigation and Prosecution), Türkiye was given a moderate level of effectiveness, reflecting progress compared with the previous assessment. However, the investigations do not cover all relevant offences, such as drug trafficking and smuggling. Concerns persist regarding cross-border cash movements, and prosecutions are hindered by backlogs and challenges in demonstrating their effectiveness.

On Immediate Outcome 2 (International Cooperation), Türkiye was downgraded due to ineffective international cooperation in combating ML/TF.

Türkiye should implement the key recommended actions included in its FATF Mutual Evaluation Report, including further prioritising money laundering investigations and prosecutions related to certain high-risk predicate offences (drug trafficking, smuggling and illegal betting) that involve complex money laundering cases, particularly linked to high-risk activities (professional money launderers, goods and cross-border movement of currency, misuse of legal persons).

Türkiye should also develop clear guidelines for money laundering, prioritising prosecutions in line with Türkiye's risk profile to reduce the backlog of pending prosecutions.

In 2025, the financial intelligence unit (MASAK) submitted criminal complaints against 559 individuals on charges related to money laundering.

Cybercrime

Türkiye is party to the Council of Europe's Budapest Convention on Cybercrime but has not signed its Second Additional Protocol on enhanced cooperation and disclosure of electronic evidence. In compliance with the Budapest Convention, a contact point was established and is based in the National Cybercrime Department.

There is no national strategy or action plan in place against cybercrime. However, the National Cyber Security Strategy and Action Plan (2024-2028) covers some measures against cybercrime with some cyber-related offences also included in the Turkish Criminal Code. The Law on cybersecurity adopted in March 2025 introduced stronger penalties for serious cyberattacks against state systems and illegal dissemination or sale of stolen cyber data. Between 1 September 2025 and 9 April 2026, 180 cybercrime operations were conducted.

Child sexual abuse online

Although Türkiye has ratified the Council of Europe's 'Lanzarote Convention', further alignment is needed on fighting child sexual abuse both online and offline, including by

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aligning with the directive on combating the sexual abuse and sexual exploitation of children and child pornography.

Trafficking in human beings

The legal framework on trafficking in human beings (THB) is largely in line with international conventions and the EU *acquis*. The third national action plan against THB, adopted in January 2025, is under implementation. 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.

Mechanisms for the early detection and protection of victims of THB are in place, with gradual improvements in identification practices and data collection, although challenges remain. Türkiye remains an important transit and destination country for THB. An increase in the number of victims identified was observed in 2025 (261 victims) as compared with 2024 (179 victims). As of 2 April 2026, 79 victims had been identified. Most victims are of Syrian origin, subjected primarily to mixed, sexual or labour exploitation as well as forced marriage. The total capacity of shelters increased to 100 in Ankara, Kirikkale, Kütahya and Mardin.

A telephone helpline is in place as well as a cooperation agreement signed with the Turkish Red Crescent to provide psychological and social services to victims in the shelters. There is still a need to increase partnerships with civil society on victim identification and protection efforts and provide more effective and professional services to victims of THB.

Migrant smuggling

A new 2026-2030 Irregular Migration Strategy Document was adopted in November 2026. Türkiye participated in the second Senior Officials Meeting of in the Global Alliance to Counter Migrant Smuggling in July 2026 but did not endorse the Global Alliance Joint Declaration. Due to its strategic position, Türkiye's cooperation and participation in countering the activity of criminal networks involved in migrant smuggling on the Eastern Mediterranean route is key. As of October 2026, 10 692 migrant smugglers had been apprehended. In 2025, a total of 11 588 migrant smugglers were apprehended (compared with 10 482 in 2023 and 13 061 in 2024).

Trafficking in firearms

The legal and institutional framework for firearms control and trafficking of small arms and light weapons (SALW) remains only partially aligned with the EU *acquis* and with EU strategic frameworks on illicit firearms trafficking. Türkiye is a signatory to the UN Protocol against the Illicit Manufacturing of and Trafficking in Firearms.

Türkiye has legislation in place specifically targeting the proliferation of unlicensed firearms and enhance the penalties for illegal trafficking and possession. The Strategy Document on Increasing the Effectiveness of Countering Financing of the Proliferation of Weapons of Mass Destruction in Türkiye (2025-2029) is in place. Türkiye participates in two operational actions under the EMPACT firearms and explosives OAP for 2026-2027.

It is strongly recommended that Türkiye increases its commitment in two operational actions of the EMPACT on firearms and explosives: one focuses on the threat of counterfeit weapons and the other one on the threat of convertible alarm and signal weapons.

Cooperation in the field of drugs

The legal framework for cooperation in the field of drugs needs to be improved.

The National Strategy and Action Plan against Drugs (2024-2028) is in force and is coordinated by the Ministry of Health. The Turkish National Monitoring Centre for Drugs and Drug Addiction (TUBIM), attached to the Turkish National Police, is the EUDA National Focal Point. A total of 1 109 new psychoactive substances have been included in national legislation and 37 of those were put on the list in 2025.

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Türkiye is a major corridor for drug trafficking between Asia and Europe and also between Latin America and Europe. Information sharing and cooperation with EU law enforcement partners should be reinforced to improve coordination and effectiveness.

In 2025, the national law enforcement units carried out operations seizing 2.76 tonnes of heroin (4.3 tonnes in 2024), 25 tonnes of cannabis (40 tonnes in 2024), 3.1 tonnes of cocaine (3 tonnes in 2024), 25.3 tonnes of methamphetamine (33.8 tonnes in 2024), 3 tonnes of synthetic cannabinoids (2 tonnes in 2024), over 20 million amphetamine tablets bearing the Captagon logo (16 million in 2024) and 6.6 million ecstasy tablets (5.1 million in 2024).

Compared to 2024, the overall trend shows a slight decline in drug seizures while remaining within the trend of overall historically high seizure rates.

Regarding the new EMPACT cycle for 2026-2029, Türkiye proposed an operational action targeting major drug trafficking networks in Türkiye and its region, which was endorsed under the Most Threatening Criminal Networks and Individuals (MTCNI) OAP. Despite its initial proposal, Türkiye later withdrew from participating in this action. The country should increase its participation within the EMPACT MTCNI OAP and engage further in other pertinent OAPs combating drug trafficking.

Counterfeiting of the euro

Türkiye's legal framework on currency counterfeiting is partially aligned with EU *acquis*.

It criminalises the production, distribution, possession and circulation of counterfeit currency, both domestic and foreign. The legislation provides for penalties, especially when offences are committed by organised crime groups or involve cross-border elements. Türkiye is a party to the 1929 Geneva Convention for the suppression of counterfeiting currency.

Counter-terrorism, prevention and resilience

Fight against terrorism and prevention of radicalisation

Legal alignment, strategic and institutional framework

The legal frameworks for the fight against terrorism and for countering violent extremism are not aligned with the EU *acquis.*

Considering ongoing domestic and cross-border security threats and challenges, Türkiye's counter-terrorism efforts remain vital for national and European security.

While legal and institutional frameworks to combat terrorism exist, abuse of the frameworks persist particularly in striking an appropriate balance between protecting fundamental freedoms and addressing security needs in anti-terrorism and national security legislation. There is no comprehensive strategy, action plan, or clear political ownership guiding counter-terrorism efforts.

Türkiye should align its legislation with the EU *acquis*, particularly regarding the definition of terrorism as set out in the EU Directive on combating terrorism.

Implementation and enforcement capacity

The fight against terrorism and the countering of violent extremism needs to be improved.

In 2025, the Turkish government initiated a renewed peace process, seeking to achieve the PKK's disarmament, demobilisation and reintegration into civilian life, following a declared ceasefire and a stated commitment by the PKK leadership in 2025 to dissolve its armed structures and abandon violence. The ongoing peace process has contributed to a reduction in terrorist attacks and a more stable security environment, however, the process remains in the initial stages.

Preventive measures are insufficient and should be strengthened. Cooperation with the EU and the Member States should therefore be further strengthened, including the prevention

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and countering of violent extremism, the fight against terrorism financing, and tackling the links between organised crime and terrorism.

Cooperation between the country's authorities, EU Member States, and EU agencies on counter-terrorism also remains limited. As Türkiye's data protection framework is still not in line with the EU *acquis*, an international agreement enabling the exchange of personal data with Europol has yet to be concluded. In the absence of such an agreement, the transfer of data by Türkiye to Europol concerning terrorist suspects and other individuals posing security threats remains limited.

Türkiye is encouraged to apply the methodology developed with the support of the Counter Terrorism Support Network to prepare a domestic terrorism trend and situation report.

Critical infrastructure protection

Legal alignment, strategic and institutional frameworks

The legal framework for critical infrastructure protection is partially aligned with the EU *acquis*.

Türkiye has been moving towards a more centralised model for critical infrastructure protection. However, it lacks a comprehensive Law on critical infrastructure protection and critical entities resilience. In May 2026, the Cybersecurity Council formally identified the sectors in which critical entities and critical infrastructure could be identified under the 2025 Cybersecurity law, providing a common national classification of critical sectors.

Implementation and enforcement capacity

Implementation and enforcement capacity remains uneven across sectors. While protection measures are generally well developed in strategic areas such as energy, telecommunications and transport, capacity varies across other sectors due to the absence of a comprehensive law, fragmented institutional responsibilities and inconsistent regulatory enforcement. Differences in resources and preparedness among public authorities and infrastructure operators also contribute to uneven implementation.

Migration and asylum

Legal and irregular migration and returns

Cooperation with Türkiye on combating irregular migration is generally effective. However, the management of legal and irregular migration needs to be improved.

Legal alignment, strategic and institutional frameworks

The Presidency for Migration Management (PMM) largely relies on EU-funded projects to support its operations. PMM recruits a limited number of social workers, psychologists, lawyers and interpreters through national funds. Personnel shortages in these profiles persist, particularly in removal centres and the provincial administration. To address these, the PMM had initiated recruitment of new cadre of 'administrative detention personnel' to be deployed in removal centres. However, no personnel had been employed yet in these categories.

Implementation and enforcement capacity

The EU-Turkey Statement continues to be the main framework for cooperation on migration between the EU and Türkiye. Türkiye's unilateral suspension of the return of irregular migrants from the Greek islands under the 'one-for-one' scheme continued. Regarding resettlement from Türkiye to the EU under that scheme, the total number of Syrian refugees resettled from Türkiye stood at 44 213 by the end of May 2026.

Türkiye continued to not fully implement the EU-Turkey Readmission Agreement and maintained its position not to implement the rules on third-country nationals until the visa liberalisation process is completed.

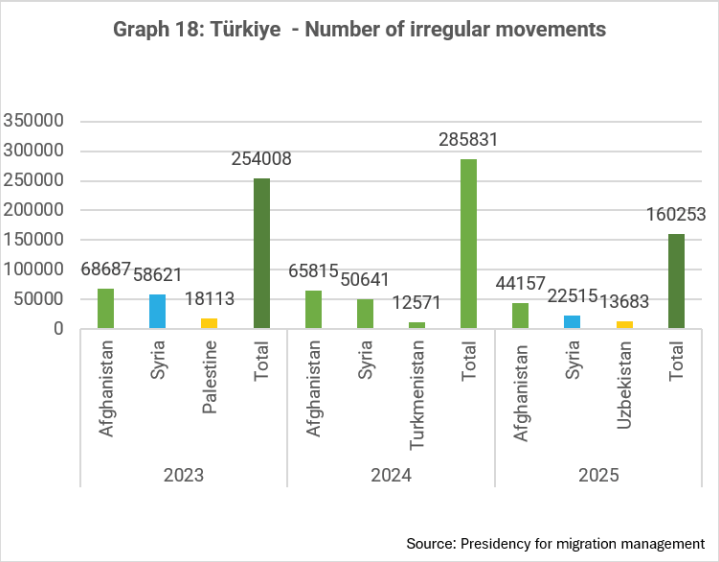
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Between January and December 2025, arrivals to the EU from Türkiye continued to decrease and compared to 2024 they almost halved. Similarly, during the first six months of 2026, arrivals from Türkiye decreased by more than a third and land arrivals increased by more than half. During the same period, the total number of irregular arrivals to Cyprus from Türkiye decreased by almost a third compared to the same period last year.

The number of irregular migrants apprehended in Türkiye by law enforcement agencies stood at 160 253 by the end of 2025, representing a yearly decrease by 29% (225 831 in 2024, 254 008 in 2023, 285 027 in 2022). The number of mobile migration points engaged in the fight against irregular migration reached 375 throughout all 81 provinces of Türkiye.

Türkiye returned 113 261 irregular migrants in 2025. Voluntary returns of irregular migrants financed through national as well as EU funds continued. 4 159 irregular migrants were returned until the end of 2025 since the national voluntary return scheme became operational in 2022. Voluntary returns assisted by the IOM and financed by the EU also continued, with 1 453 irregular migrants returned in 2025 alone. 12 427 irregular migrants have received voluntary return assistance through EU financed projects implemented between 2015 and 2025.

The number of removal centres remained at 32, with a total capacity to host 18 780 irregular migrants. The PMM also set up pre-reception and transfer centres (referred to as GÖKSEMs) in major provinces to screen irregular migrants apprehended by law enforcement agencies, before their transfer to removal centres for administrative detention. GÖKSEMs contributed to preventing overcrowding in removal centres. However, the legislation applied in these centres is not public or transparent.



Cases of ill-treatment in removal centres continued to be reported in Turkish and foreign media. A landmark judgment was issued by the Turkish Constitutional Court in February 2026, in an application made by an Iraqi citizen held in the Şanlıurfa Removal Centre between January and May 2025. The Constitutional Court concluded that there are no remedies to challenge detention conditions at removal centres with respect to the right to prohibition of ill-treatment and torture, which is in violation of the 'right to effective remedy' guaranteed by the Turkish Constitution. The Court called for legal reform to address this issue. Considering the high number of pending applications on the same subject and pointing to a structural problem, the Court sent the judgment to the Parliament to adopt legislation that would establish an effective remedy to file complaints on detention conditions in removal centres.

A total of 1 151 969 of non-Turkish nationals were legal residents in Türkiye in 2025 (1 056 632 in 2024; 1 107 032 in 2023). Nationals of Turkmenistan, Azerbaijan, Syria and Iran were the most common holders of residence permits.

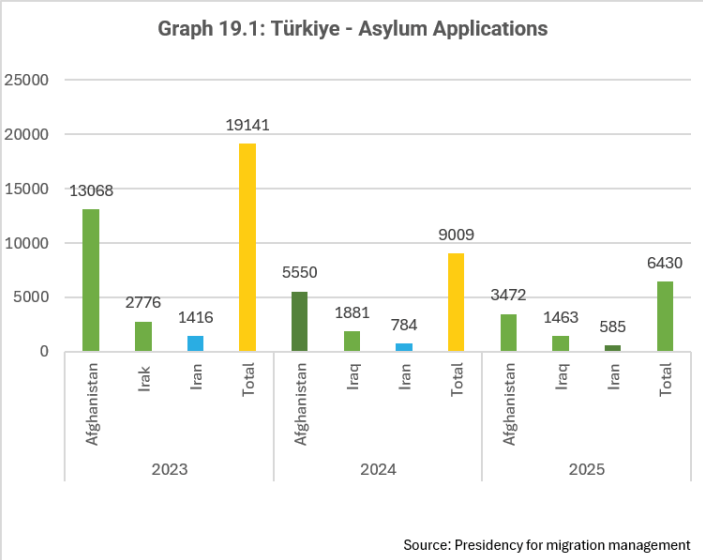
Asylum

The legal framework on asylum is partially aligned with the EU *acquis*. The management of asylum 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, most people seeking international protection in Türkiye cannot apply for full refugee status but only for 'conditional refugee' status and subsidiary protection.

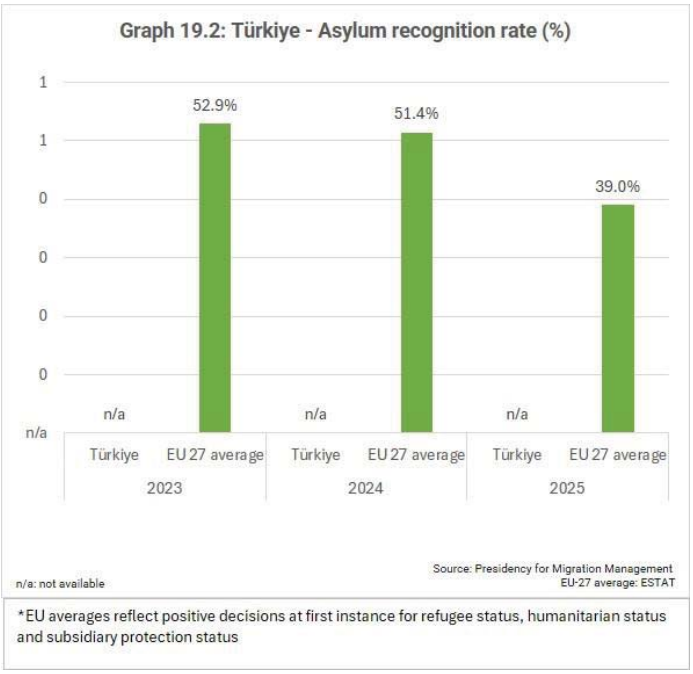


Implementation and enforcement capacity

Türkiye continued to host one of the largest refugee populations in the world, with 2 280 690 Syrians with temporary protection status. There are approximately 166 000 non-Syrians, whose number slightly declined over the reporting period (172 602 in 2024).

The number of applications for international protection dropped by more than 70% in the last three years. In 2025, the cumulative total of pending international protection applications stood at 114 366 (162 787 in 2024). The significant backlog was not reduced. There is no publicly accessible data on international protection that would give a breakdown by category of decisions and pending cases on a yearly basis.

There are still barriers 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.



During the reporting period, the PMM reduced overcrowding and closed temporary accommodation centres (TACs). More than 57 000 evacuated refugees are provided with three options: (i) register and live in a province; (ii) voluntary return to Syria; (iii) referral to the Adana TAC (which is one of the few remaining open TAC and the only one designated to host a limited number of the most vulnerable refugees).

NGOs have been critical of the TAC closure policy, arguing that most evacuated refugees are not left with a viable option other than voluntary return considering the 'closed neighbourhoods' policy to bar evacuees from registering in places with an already high concentration of refugees and other barriers to lodging or updating registrations in provinces.

As of January 2026, there were nine TACs hosting a total of 7 000 persons. One of these TACs (Nizip in the Gaziantep province) is piloted as the 'International Protection Assessment Centre' through which new international protection (IP) applicants across Türkiye are referred to for registration and processing of IP applications. During the processing, IP applicants are provided with accommodation and other basic services.

Following the fall of the Assad regime in Syria in December 2024, the number of voluntary returns to Syria exceeded 720 000 as of August 2026, with returnees citing political developments, improved security and family reunification as the main drivers of return.

Vulnerable groups such as female headed households and unaccompanied or separated children are at heightened protection risk in the voluntary return processes. It is important that returns continue to be independently monitored by UNHCR to ensure compliance with international laws and standards.

The PMM and the EU Agency for Asylum continued their cooperation as part of 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 that of the EU. 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. 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 ('cascade rule'), in order to further facilitate people-to-people contacts.

The share of multiple-entry visas increased to 68.7% in 2025, compared with 65% in 2024. More than 1 265 000 visa applications were processed by Schengen consulates in Türkiye. This is, an almost 10% yearly increase in the number of visa applications processed.

Schengen governance and external borders

The legislative framework for external border management, along with its implementation and enforcement capacity, needs to be improved.

Legal alignment, strategic and institutional frameworks

The PMM remains the main coordinating body responsible for border management.

The Integrated Border Management Coordination Board has not met since its creation. Interinstitutional meetings on specific topics were held at technical level.

The protracted operationalisation process of the National Coordination and Joint Risk Analysis Centre (NACORAC) since its formal establishment in 2016 has made significant headway. Data patterns have been exchanged, determined and harmonised, standard operating procedures (SOPs) developed, and data sharing and integration protocols signed with four national stakeholder institutions (i.e. with the Coast Guard Command within the Ministry of Interior and with the ministries of national defence, trade and health).

Negotiations to determine the procedures and methods for sharing the requested data under these protocols continue. Moreover, web service integration processes for data

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diversification are underway. Technical work is ongoing, including on a model to update the service architecture, with the aim of minimising data loss specifically for the data transferred. This process includes data pattern harmonisation, web service definitions, database changes and potential software improvements. The Centre's first Annual Risk Analysis Report was prepared in 2025, also using real time data from the NACORAC software.

Türkiye still lacks a national Integrated Border Management (IBM) strategy and an updated action plan, but efforts have continued to finalise the existing drafts and ensure buy-in and endorsement by all stakeholders. To that end, an EU-funded project designed as a catalyst to facilitate the development and finalisation of these documents has been extended until the beginning of 2027. The IBM strategy and action plan 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 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 unmanned land borders, which are under the responsibility of the Turkish Land Forces.

Implementation and enforcement capacity

Türkiye continued to invest significant efforts and financial resources in border security at the land borders, in particular by modernising physical and technological infrastructure. As of February 2026, the modular concrete wall has reached a total length of 1 323 km, supported by 1 767 km of patrol roads along Türkiye's borders, 1 052 km of border lighting systems (376 km of which were camera- and sensor-activated), 362 electro-optical communication and surveillance masts, as well as 289 thermal cameras and related elevator systems.

The 560 km long border with Iran has reached high protection standards, around 83% of is protected by modular concrete wall, while around 92% of it has been equipped with an electro-optical communication and surveillance mast system. Furthermore, drones and snow clearance equipment have been procured. The EU provides substantial funding to support Türkiye in modernising its border surveillance infrastructure, including: (i) electro-optical communication and surveillance masts; (ii) lighting systems; and (iii) mobile electro-optical (thermal) cameras.

Relations with the European Border and Coast Guard Agency (Frontex) are based on the 2012 Memorandum of Understanding. The memorandum should be updated to reflect the revisions of the EBCG Regulation and in order to allow the EU and Türkiye to fully benefit from Frontex's expanded mandate. 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 the country's authorities during the reporting period.

Türkiye maintained cooperation with neighbouring countries Greece and Bulgaria through the trilateral Police and Customs Cooperation Centre at the Kapitan Andreevo/Kapıkule border crossing, focusing on data sharing under existing agreements.

Türkiye continued to contribute to Interpol's databases, but only through manual requests when required. However, Interpol's stolen and lost travel documents database is not integrated into Türkiye's national database, and access to other international police databases remains unavailable. Authorised officers of the Turkish National Police can access local databases across all 81 provinces.

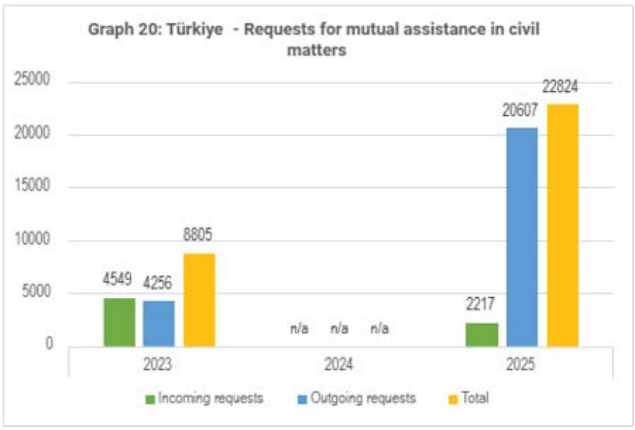
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Judicial cooperation in civil and commercial matters

The legal framework for judicial cooperation in civil and commercial matters is partially aligned with the EU *acquis*, to the extent that alignment is already possible.

The 11th Judicial Reform Package introduced electronic filing systems for civil and commercial cases. This improves communication between parties and cross-border legal procedures, reducing delays in international cases.

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.



2.3. ECONOMIC CRITERIA[7]

Table: **Türkiye - Key economic figures**	**2017-22** average	**2023**	**2024**	**2025**
GDP per capita (%of EU-27 in PPS)[1)]	61	67	69	67
Real GDP growth	5.3	5.0	3.5	3.7
Activity rate of the population aged 15+ (%), total	52.1	53.3	54.2	53.5
female	*33.5*	35.8	36.8	36.2
male	*71.2*	71.2	71.9	71.3
Unemployment rate of the population aged 15+ (%), total	11.9	9.4	8.7	8.3
female	*14.6*	12.7	11.8	11.3
male	*10.6*	7.7	7.1	6.8
Employment of the population aged 15+ (annual growth %)	2.2	2.9	3.1	-0.1
Nominal wages (annual growth %)	27.4	106.3	91.8	39.5
Consumer price index (annual growth %)	24.5	53.9	58.5	34.9
Exchange rate against EUR	8.7	25.7	35.5	44.7
Current account balance (%of GDP)	-2.4	-3.7	-1.0	-1.9
Net foreign direct investment, FDI (%of GDP)	0.9	0.4	0.4	0.2
General government balance (%of GDP)	-2.3	-5.1	-4.8	-2.6
General government debt (%of GDP)	32.3	28.3	23.6	23.7

Notes :
1) Eurostat
Sources: Turkstat, Central Bank of Türkiye, Turkish Ministry of Treasury & Finance and Eurostat

2.3.1. The existence of a functioning market economy

Economic governance

The economic fallout of the conflict in the Middle East and rising domestic political

[7] Unless otherwise indicated, the data in this section is taken from the relevant nation sources (the statistical office, Ministry of Finance and central bank)

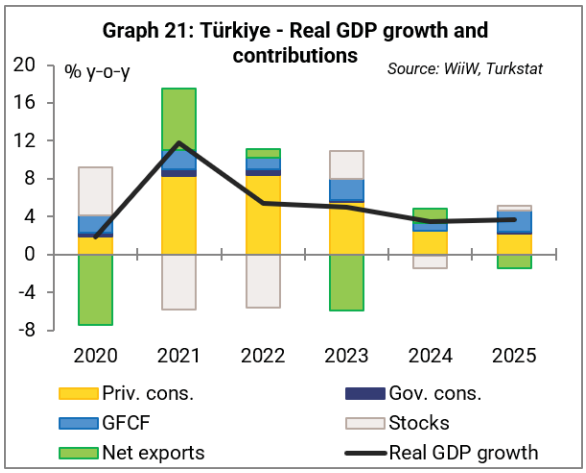
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tensions weighed on the ongoing stabilisation programme. Despite the economy's increased resilience over recent years, Türkiye's exposure to geopolitical tensions and energy price shocks is high. The judicial procedure against the leadership of the main opposition party further rattled the markets and dented confidence. These developments have undermined economic growth and disinflation efforts, while increasing sovereign risk premiums and putting pressure on the Turkish lira. The authorities reacted by slightly tightening monetary policy (without raising the policy rate), by intervening to support the lira, and by adopting measures to curtail price pressures and financial risks.

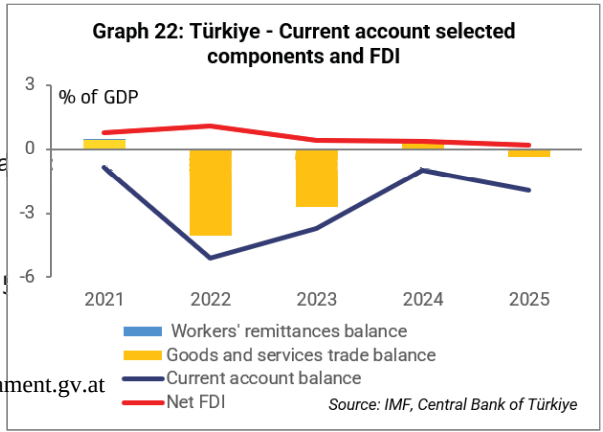
The policy guidance set out in the conclusions of the Economic and Financial Dialogue of May 2025 was only partially implemented[8]**.** The authorities kept a relatively tight monetary and fiscal policy mix to support disinflation. Fiscal risks eased following the complete elimination of the FX-guaranteed deposits scheme. At the same time, the budget deficit stopped improving in 2026 due to the introduction of several support measures aimed at cushioning the economic impact of the conflict in the Middle East on firms and households. The central bank continued to simplify macro-prudential measures and the authorities continued to align financial sector regulation and supervision with best international practices. The planned update of corporate governance regulations in line with international standards and the revision of the public procurement legislation to limit the use of exclusions and negotiated procedures were delayed. Limited steps were taken to phase-out fossil fuel subsidies.

Macroeconomic stability

Economic growth is slowing down on the back of weakening domestic demand. Following a 3.5% increase in 2024, real gross domestic product (GDP) growth accelerated to 3.7% in 2025 but then slowed down to 2.3% year-on-year in the second quarter of 2026. Household consumption and investment were strong in 2025 but weakened during the first half of 2026. Government consumption remained subdued, with growth slowing steadily since the fourth quarter of 2025 before turning negative, contracting by 1.8% in the second quarter of 2026. In addition, in an unstable external environment and amid an appreciating real effective exchange rate, exports remained weak and the contribution of net exports to growth turned negative. Türkiye's per capita GDP in purchasing power standards stood at 67% of the EU average in 2025, down from its peak of 69% in 2024.



The current account deficit is moderate but has widened, and downside risks are sizeable, while capital flows remain volatile. The current account deficit increased to 1.9% of GDP in 2025, up from 1.0% in 2024. It continued to widen on weak export performance in early 2026, already before the conflict in the Middle East escalated and global energy prices rose to a multi-year high. Geopolitical tensions and the court case against the main opposition party increased the country risk premium and triggered sizeable capital outflows. Due to large interventions in support of the lira and changes in the gold price, the central bank's reserves went through significant oscillations in early 2026 – reaching a low point in end-March, and



[8] 2026 Economic Reform Programmes of Albania, Bosnia
North Macedonia, Serbia and Türkiye.

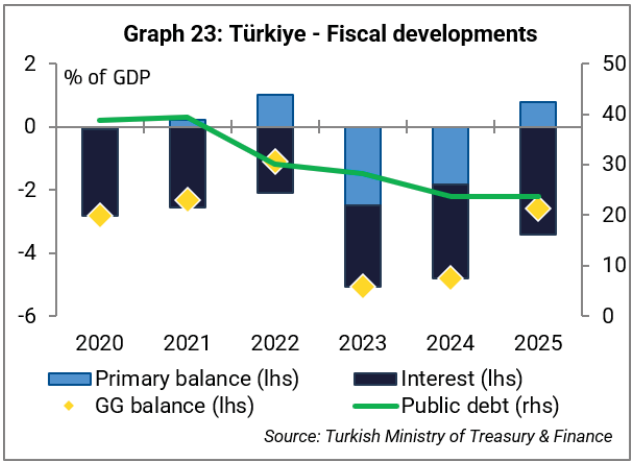
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another downtick in May. Reflecting this notable fall in international reserves, Türkiye's sovereign credit rating outlook was downgraded in April. Heavy reliance on the nominal exchange rate as an anchor for disinflation has resulted in a pronounced real appreciation of the lira, which poses a risk to the country's external competitiveness. Foreign direct investment (FDI) inflows remained below 1% of GDP in 2025, indicating Türkiye's untapped potential to attract FDI. Balance-of-payments risks appear manageable in view of the moderate gross external financing needs, unhindered access to foreign financing, and a further decline of external debt to around 32% of GDP by mid-2026. Türkiye's five-year credit default swap spread surged by around 100 basis points (bps) at the onset of the conflict in the Middle East but has since come back down.

Disinflation has stalled and inflation remains high. The central bank operates under an inflation targeting regime and has made progress towards re-establishing its credibility in recent years, although central bank independence has yet to be secured (*see Chapter 17 – Economic and monetary policy*). In 2025, it kept monetary policy relatively tight, slowly bringing down inflation and inflationary expectations, and improving its foreign-exchange position. Yet, since January 2026, the policy rate has been held steady at 37%, even as a large energy shock stalled disinflation. Instead, the effective bank funding rate was temporarily raised, and the central bank continued to actively regulate credit growth via caps on the growth of certain loan categories. Other steps to strengthen the monetary transmission system and to support the use of the Turkish lira were taken. Year-on-year monthly inflation figures have hovered around 31% since the end of 2025. The recently released 2027-29 Medium-Term Programme (MTP) suggests that single digit inflation will only be reached by 2029, two years later than previously projected. By September 2026, 12-month ahead inflation expectations remained largely unanchored (market participants: 23.7%, firms: 32.8, households: 45.6%).

Fiscal policy tightened in 2025 to support disinflation and remained prudent in the beginning of 2026. At 2.6% of GDP, the 2025 budget deficit was lower than planned, underpinned by robust revenue growth and spending discipline. The primary balance improved strongly and turned positive in 2025 but stopped increasing in 2026. The subsidies aimed at containing energy inflation for firms and households were an important contributing factor. The 2027-29 MTP targets a deficit of 3.1% of GDP for 2026. The budget relies on continuing strong revenue collection, helped by measures to reduce the informal economy, higher social contribution revenue and further rationalisation of tax expenditure. The restrained indexation of the main public spending categories and public finance reforms to improve spending efficiency and transparency should help limit spending pressures, despite new measures to alleviate the effects of higher international energy prices. Government debt remained moderate, with the general government debt ratio increasing slightly to 23.7% of GDP in 2025. Although the fiscal framework lacks strong anchors, fiscal risks appear manageable and budgetary outcomes have frequently outperformed targets.

Graph 23: Türkiye - Fiscal developments



Source: Turkish Ministry of Treasury & Finance

Disinflation remained the overarching policy priority, although progress was slow and inflation targets were revised upwards. The policy mix tightened in 2025 as fiscal policy joined an already tight monetary policy stance. In the first half of 2026, mounting international and domestic challenges led to more complex policy dilemmas, with fiscal and monetary policy adjustment stalling amid weakened economic growth.

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Functioning of product markets

Business environment

The authorities took limited steps to improve the business environment. Structural challenges, including lack of transparency and predictability, continue to negatively impact the business sector. Specialised courts and alternative dispute settlement mechanisms have been set up, but the effectiveness of the justice system and the length of court proceedings still need to improve. The Coordination Council for Improving the Business Environment reported that Türkiye has completed 9 of the 39 actions in its 2025 action plan. Key achievements include faster renewable energy investment processes, adoption of a green industry certification system, and progress on the green taxonomy and carbon tax framework. Türkiye still lacks a mechanism for systematically consulting social partners when preparing new legislation. Market exit remains costly and time-consuming due to complicated insolvency proceedings. In 2025, there was a further increase in the number of liquidated and closed companies, and a drop in the number of newly established businesses. Meanwhile, the acquisition and management of companies under the trusteeship of the Savings Deposit Insurance Fund is still conducted in a non-transparent manner. The government did not publish an evaluation of progress made under the action plan for the fight against the informal economy (2023-2025) and did not prepare a new action plan for the upcoming period. The informal sector's share in the economy remains structurally high (estimated at around 30% of GDP) and well above the OECD and EU averages.

State influence on product markets

Trade and price-setting interventions increased, and State aid transparency and control remain weak. The authorities introduced various export quotas (e.g. chickpeas and dried beans) and further export restrictions (e.g. poultry meat), while new customs duty reductions were applied to certain products (i.e. lemon, oat). While these efforts aim to control food prices and ensure supply security, they risk distorting trade incentives and reducing policy predictability for producers and exporters. As part of broader efforts to support households, subsidies in 2025 covered approximately 57% of electricity and 66% of residential natural gas costs (moderating to 57% by January 2026). Consumers with high consumption levels are being gradually excluded from subsidy support. In response to rising oil prices, the Ministry of Treasury and Finance reintroduced the sliding scale system, under which the special consumption tax on fuel products is adjusted downwards in line with the increases in oil prices to protect consumers from excessive price hikes. The system is scheduled to be retired on 1 October 2026. The authorities also introduced changes in the price-setting mechanisms for various services and products (e.g. reducing backward indexation in private schools, introducing value-based pricing in human medicinal products, and strengthening price incentives for generic medicine market entry). Meanwhile, regulatory authorities continued to carry out extensive price audits to investigate allegations of unfair pricing and stockpiling. The Price Tag Regulation was amended in October 2025 to improve price transparency, digital accessibility and consumer protection. The Law on State aid cannot be enforced due to the absence of implementing legislation and an operational institutional framework. The lack of a comprehensive State aid inventory, as well as the actual or budgeted amount of State aid granted and foregone revenues, continues to be a concern (*see Chapter 8 on 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. In 2025, privatisation receipts reached USD 1.9 billion, marking the highest level in the last 10 years, with most proceeds stemming from the sale of immovable property. The Turkish Wealth Fund (TWF) has a portfolio of assets consisting of 36 companies from the financial (including state-owned banks, Borsa Istanbul and consolidated public insurance companies), telecommunications, petrochemicals, real

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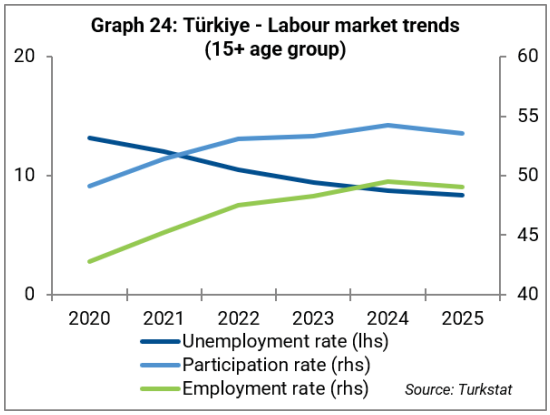
estate, mining and iron/steel, agriculture and transport/logistics sectors. The TWF's total assets increased to TRY 12.7 trillion in terms of value in 2024, up from TRY 9.4 trillion in 2023, yet its share in GDP further declined from 35.2% to 28.5%. In September 2026, the authorities announced their decision to grant 30-year operating rights for major road infrastructure, including two Bosphorus bridges, without transferring ownership.

Functioning of the financial market

The banking sector remains sound and well capitalised. Capitalisation remained strong and the sector's capital adequacy ratio was 19.7% at the end of 2025, unchanged from 2024, while in state-owned banks it was 19.0% (18.2% in 2024). Forbearance measures were completely phased out in the beginning of 2026. The ratio of non-performing loans to total cash loans was 2.9% in July 2026 (2.3% in state banks vs. 3.3% in domestic private banks), increasing slowly since early 2024, while loan-loss provisioning and collection of impaired loans remained relatively high. The real growth of bank lending was largely unchanged in early 2026, with a stronger expansion of lending to households and more subdued corporate lending. The termination of the FX-protected lira deposit scheme last year was an important achievement. In 2025, the central bank recorded a significant loss for a third year in a row mainly due to higher payments related to monetary policy operations. Total banking system assets increased slightly from 73% of GDP in 2024 to 75% in 2025. The share of foreign-owned banks in total banking sector assets remained largely unchanged at 24%. Türkiye's benchmark BIST 100 stock index recorded sharp declines on 15 and 16 September 2026 following the bursting of a speculative bubble, linked to suspected market manipulation. The crisis appears to have been contained, with limited risk of broader systemic spillovers. Nevertheless, it has raised concerns about the functioning, regulation and supervision of Türkiye's financial and capital markets. The Turkish authorities are preparing a compensation or payment schedule for investors who incurred losses, while work on a new legislative framework is under way.

Functioning of the labour market

The labour market weakened amidst persistent structural challenges. The participation rate (15+ age group) declined to 53.5% in 2025, and to 52.5% in July 2026. The employment rate also declined to 49.1% in 2025, and to 48.3% in July 2026. The unemployment rate declined to 8.3% in 2025 and 8.1% in July 2026. The gender employment gap remained very large at 34.3 pps in 2025. Women's labour market participation is hindered by occupational barriers, traditional gender roles, gender gaps in education, and a lack of affordable high-quality childcare facilities *(see Chapter 19 – Social policy and employment).* Labour underutilisation increased from to 29.7% in 2025 (39.1% for women). Although young people continue to face difficulties entering the labour market, the youth unemployment rate (15-24) declined to 15.3% in 2025 and 14.5% by July 2026. The share of young people not in employment, education or training remained elevated at 23.3% in 2025. Regional labour market disparities continued to decline but remained high, with unemployment rates across different provinces ranging from 4.0% to 13.8% in 2025. To support disinflation, the gross minimum wage was raised by 27% in 2026, which was below the 2025 inflation rate. Almost half of formally employed workers receive the minimum wage.



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

Education and innovation

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Despite ongoing efforts to enhance human capital, important challenges remain. Expenditure on education (public and private) was 4.9% of GDP in 2024[9], up from 4.2% of GDP in 2023. Government spending was 4.0% of GDP in 2024, increasing by 0.5 percentage points from 2023. Private spending on education is relatively high, and prices are increasing faster than general inflation, raising concerns about unequal access and perceived quality gaps in the public schooling system. Net enrolment rates remain low for various age groups, and were declining in 2024-25 for pre-school, lower-secondary and upper-secondary, as well as for higher education (*see Chapter 26 on education and culture*). Further measures are needed to improve the quality of and access to vocational education and training. On the upside, the 2026 PISA survey data highlight a strong upward trajectory in Türkiye's education outcomes over recent years. Turkish 15-year-olds performed better than the OECD average on science and reading, and close to it on mathematics.

Innovation outcomes improved yet remain lagging behind the EU average. The Research and Development (R&D) expenditure-to-GDP ratio increased only marginally from 1.4% in 2023 to 1.5% in 2024, still significantly below the EU average of 2.2%[10]. Financial support schemes for innovation are rarely subject to systematic evaluation. The private sector continues to be the primary driver of R&D, accounting for 64.8% of R&D expenditure in 2024, albeit with a marginal decrease of 0.3 percentage points from 2023. Türkiye ranked 43rd out of 139 countries in the Global Innovation Index in 2025. However, Türkiye's innovation system still lags behind its European peers, standing at 58% of the EU average in 2025, although the gap is narrowing (see *Chapter 25 on science and research*). Yet, in 2025, the total number of granted patents declined slightly by 1.4% compared with 2024, following a 15.9% increase relative to 2023. The growth rate of domestic patents granted slowed to 10.3%, while the number of international patents decreased by 6.3% in Türkiye in 2025 compared with 2024.

Physical capital and quality of infrastructure

Investment activity decelerated slightly amid sustained tight financial conditions. Total gross capital formation accounted for 30.6% of GDP in 2025, down by 0.7 percentage points from 2024. The share of construction in total investment remained strong during the first three quarters but declined in the last quarter. Investments in machinery and equipment gained certain momentum in the second half of 2025. Türkiye retains its ambition of becoming a regional energy hub, investing heavily in expanding its liquified natural gas import, re-gasification, and natural gas storage capacities. The share of renewable energy continued to increase, reaching 62.4% of the installed power in operation in March 2026. 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 and medium-sized enterprises (SMEs). Yet, there is scope to raise broader awareness on service availability among SMEs. The number of users of e-government services increased from 67.95 million in August 2025 to 68.93 million in April 2026, with a total of 9 223 integrated services online.

Sectoral and enterprise structure

The economy is diversified, with a well-developed and growing service sector and a strong manufacturing base. The share of services in GDP increased to 59.4% in 2025, up from 57.5% in 2024. Similarly, its share in total employment increased from 57.9% in 2024 to 59.0% in 2025. The industry's share declined from 19.7% in 2024 to 18.1% in 2025. Its share in total employment has decreased marginally from 20.7% in 2024 to 20.2% in 2025. The construction sector's share in GDP increased slightly from 5.8% in 2024 to 5.9% in

[9] TurkStat releases data on expenditure on education with a year delay, hence only data for 2024 is currently available: https://veriportali.tuik.gov.tr/en/press/53897

[10] Due to publication delays, these are the most recent data available.

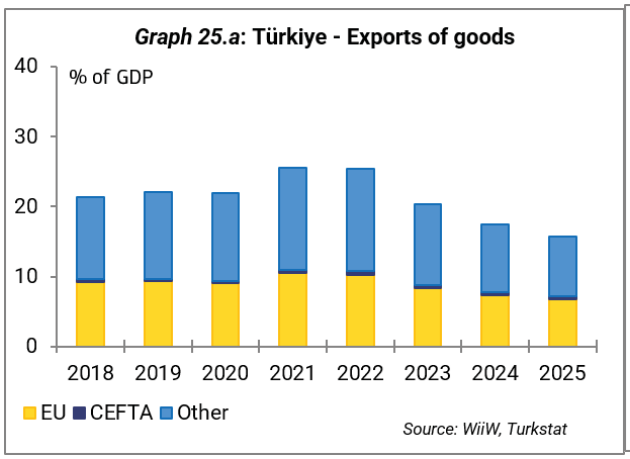
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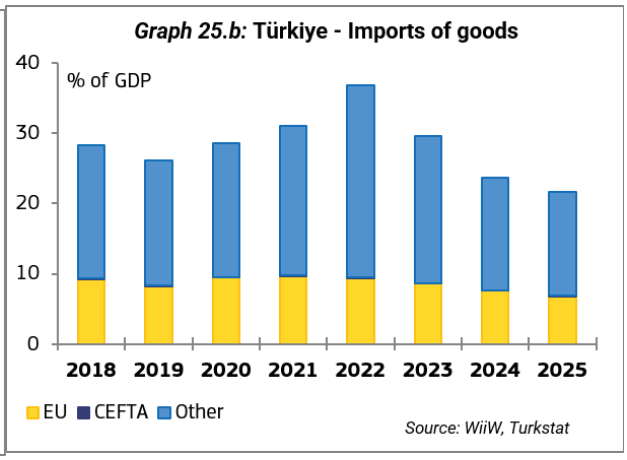
2025, still significantly below its pre-2019 levels. Its share in total employment increased marginally to 6.8% in 2025, up by 0.2 percentage points in 2024. Amid persistent productivity challenges and adverse climate conditions, the agriculture sector's share fell further to 5.2% of GDP in 2025 and its share in total employment to 14.0% in 2025[11]. SMEs are the backbone of the economy, accounting for 68.5% of employment in 2024 and 41.2% of the total value added in 2024, increasing by around 1.1 percentage points compared with 2023. Approximately 54.8% of SMEs in the manufacturing sector operated in low-technology sectors in 2024, compared with 55.6% in 2023, indicating an improvement. Türkiye continued to implement various economic support schemes that target SMEs, yet access to and the cost of long-term finance remain a problem. Firms are increasingly reaching for non-bank sources of funding (e.g. equity markets, venture capital, and crowdfunding).

Economic integration with the EU and price competitiveness

Economic integration with the EU is high. Türkiye remained the EU's fifth largest trading partner, accounting for 4.2% of the EU's total trade in goods with non-EU countries in 2025, unchanged from 2024, while the EU is Türkiye's largest trading partner. The EU's share of Turkish goods exports increased to 42.8% in 2025, up from 41.4% in 2024. The share of Turkish goods imports originating from the EU decreased from 32.1% in 2024 to 31.7% in 2025, staying below its long-term average. Russia's share in Turkish merchandise exports fell further to 2.5% in 2025, down from 3.3% in 2024 and from a historic high of 4.3% in 2023. The nominal value of imports of goods from Russia continued to decline in 2025, largely influenced by lower international energy prices, with Russia's share of Türkiye's total goods imports declining from 12.8% in 2024 to 11.6% in 2025. The real exchange rate (both CPI- and PPI-based) has appreciated since mid-2025, supporting the authorities' disinflation strategy but weighing on Türkiye's price competitiveness.

The EU's share of FDI inflows into Türkiye increased from 58% in 2024 to 66% in 2025. Trade openness declined further to 50% in 2025 as deflators of both exports and imports of goods and services remained markedly below the GDP deflator.





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

[11] Due to publication delays, these are the most recent data available.

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Despite a recent amendment to the Public Procurement Law (PPL), approved by the Turkish Grand National Assembly on 24 July, Türkiye's **legal framework** on public procurement remains partially aligned with the EU *acquis*. The Turkish legislation still contains discriminatory provisions requiring the use of domestic price advantage and offsets, allowing authorities to demand compensatory measures if goods are not produced in the country. The amendment introduces the possibility for the President to grant reciprocity in public procurement, but the scope of reciprocity may still be limited as the amendment fails to provide assurance for all Member States, and also due to extensive use of negotiated procedure and the high number of exemptions from the PPL in Türkiye.

The rising number of exclusions applied in procurement that are not in line with the EU *acquis* narrows the scope of public procurement rules. The legislation allows to further expand the scope of exclusions by requiring contracting authorities to procure specific goods and services from the State Supply Office. An announced extensive reform of the PPL is still pending, and meanwhile sector-specific laws continue to hinder transparency in procurement. Türkiye's 12th Development Plan (2024-2028) and newly adopted Medium-Term Economic Programme for 2026-2028 aim to support domestic products and technology transfer through public procurement.

Türkiye needs to establish an integrated system for coordination and oversight for public--private partnership (PPP) operations. Major infrastructure projects using PPPs are frequently exempted from the existing regulatory framework.

The **institutional framework** needs further strengthening as the independence of the Public Procurement Board (PPB) within the Public Procurement Authority (PPA), which continues to be potentially impaired since the President is authorised to directly appoint its chair and members, without specific regard to candidates' education or sector experience.

Implementation and enforcement capacity

In 2025, the size of Türkiye's **public procurement market** continued to reduce, decreasing to 5.1% in 2025 (5.6% in 2024), despite increase in the total value. In 2025, the excessive use of negotiated procedure continued to decrease to 37.23% in terms of value (43.79% in 2024). In 2025, only 47% of procurement procedures were open to fair competition, in terms of value. In 2025, the implementation of the domestic price advantage in international tenders continued to increase to 57.14% and 43.77% (from 54.39% and 41.62% in 2024) in value and number respectively, resulting in distortion of competition for foreign bidders.

The **capacity** of the Public Procurement Authority (PPA) **to manage public procurement processes** remained sufficient with 397 staff. The level of monitoring of contract awards and implementation is adequate, with statistical data on performance provided every six months. The number of contracting authorities participating in trainings has increased substantially with 38 542 participants in 2025 (6 359 in 2024).

The number of users in the electronic procurement platform (EKAP) continued to increase as both contracting authorities and economic operators need to register. The platform covers the whole process of public procurement.

Measures remain in place to **combat corruption**, fraud and conflict of interest in public procurement, but implementation remains weak. A risk indicator system is still needed to detect potential integrity issues.

Efficient remedy system

The **right to a legal remedy** is enshrined in the constitution and in the PPL establishing the institutional framework and the remedy system. In this regard, Türkiye is not fully aligned yet with the EU directives. Concerns persist regarding both the appointment policy and the placement of the PPB within the PPA. Türkiye needs to ensure the independence of the procurement review process, by establishing an entity that is distinct from the PPA, along with guarantees of board members independence.

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The number of complaints received by the PPB increased from 1 924 in 2024 to 2 929 in 2025, corresponding to 4.17% (2.96%) of contracts that allow for complaints.

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. Concerns remain regarding the declining public trust in key macroeconomic statistics despite increased transparency efforts. TurkStat still lacks transparent appointment and dismissal procedures, including professional criteria for the appointment of the institution's President. TurkStat expanded the use of administrative records in statistical production and further strengthened its cooperation with other data providers. While a certain number of data is free for publication, a significant number of data transmitted to Eurostat remain flagged as non-publishable.

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

On **macroeconomic statistics**, TurkStat implemented a benchmark revision in 2025 on national accounts, with GDP time series back casted to 1995. In 2025, TurkStat transmitted all mandatory and voluntary supply use and input-output tables to Eurostat for 2023. TurkStat has gradually improved the quality and timeliness of transmitting excessive deficit procedure (EDP) data. Additional efforts are still required to address methodological issues and ensure the completeness of the EDP notifications and government finance statistics. TurkStat sends quarterly balance of payments and quarterly international investment position data according to the BPM6 methodology to Eurostat. However, it still does not provide data on monthly balance of payments. Gross National Income (GNI) is compiled based on ESA 2010. Further improvements are required regarding the updating of the GNI inventory and timeliness of the data transmission.

Regarding **business statistics**, TurkStat implemented the new requirements for most short-term business statistics and continued to improve the quality and completeness of the Statistical Business Register data and metadata. Yet, there is room for improvement regarding statistics on international trade in goods by enterprise characteristics, and international trade in services. Statistics on foreign direct investment and research and development are highly compliant with EU *acquis*.

TurkStat has updated its methodology for calculating the Consumer Price Index, amending its base year from 2003 to 2025 and using the most recent version of the classification of individual consumption expenditures according to purpose. Yet, it still does not produce harmonised indices of consumer prices at constant tax rates.

Social statistics are highly compliant with the EU *acquis*. TurkStat continued transmitting the quarterly labour cost index, yet improvements are still needed in the areas of labour market statistics. The Türkiye Health Survey was carried out in 2025 using the European Health Interview Survey questionnaire and additional questions based on country-specific needs. Country-specific needs, with microdata, are expected to be transmitted to Eurostat in September 2026. Türkiye also produces statistics on immigration and emigration, but it does not yet collect statistics on asylum and managed migration in line with the EU *acquis*.

Regarding **agricultural statistics**, the full enumeration of the agricultural census has been completed and data processing and analysis are in progress. The main findings of core data

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collection expected to be released during the second half of 2026. Statistics for most crops and animal production are available and submitted to Eurostat, along with cereal and oil seed crop balances. 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 produced and transmitted regularly to Eurostat. Transport statistics are produced according to the EU *acquis*. Railways and maritime transport statistics are well advanced, and air transport statistics are highly compliant. Road freight data is not available yet. Türkiye produces most of the **environmental statistics**. Further progress is still needed on waste generation statistics. Methodological studies for circular economy indicators are ongoing.

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 (PIFC)

The strategic **framework** is partially in place. The PIFC policy paper remains unchanged since 2013 and there are no coherent strategies for public administration reform and public finance management. There are inconsistencies between the planning documents and strategies and a lack of coordination on regular monitoring and reporting.

The **internal control** system remains largely compliant with international standards, although capacity and ownership problems persist. Risk management, monitoring and reporting of irregularities, and listing local administrations and state-owned enterprises in the treasury single account raise concerns.

Türkiye has some elements of **managerial accountability** and results-oriented performance management systems. All public institutions are governed by the Public Financial Management and Control Law (PFMC). The regulations on public internal control and public *ex ante* financial control were updated in 2025.

The lack of a legal requirement to have internal audit units (IAUs) in ministries undermines the purpose, authority and responsibility of **internal audit**. The status of the heads of IAUs must be legalised, the number of internal auditors should increase, and related manuals updated. A systematic procedure to follow up on internal audit recommendations should be set up. Legislative and procedural changes should aim at clearly distinguishing internal audit functions and inspection organisations. The Internal Audit Coordination Board's independence should be ensured and its capacity, organisational structure and resources improved.

External audit

The constitutional and legal frameworks provide for the **independence** of the Turkish Court of Accounts (TCA). The TCA law complies with international standards, establishes an almost exhaustive audit mandate. TCA reports, excluding state-owned enterprises, are published online annually. However, the Türkiye Wealth Fund (TWF)is audited by third bodies that do not disclose audit reports on its operations. The TCA remains restricted from auditing companies in its portfolio and exempted from auditing the Disaster Reconstruction Fund whose relevant revenue and operational data is not made public. Continuous development of **administrative capacity** is ensured through training programmes in line with its strategic plan.

More **parliamentary scrutiny** of TCA audit findings, recommendations and the performance of public institutions is needed. TCA submits four audit reports a year and a statement of general conformity to Parliament; assessed only in budget discussions. Systematic and

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timely **implementation of recommendations** should be ensured, and the budget and audit discussions kept separate.

Protection of the EU's financial interests

Legislation still needs to be fully compliant with the **PIF Directive**, although the country maintains a good level of alignment with the EU *acquis*. A national **anti-fraud strategy** is still pending. The State Supervisory Council acts as the **anti-fraud coordination service** (AFCOS) since 2019 and an **AFCOS network** has been set up**.** The **cooperation with the European Anti-Fraud Office** (OLAF) is well established and should continue building up this track record on investigations as well as on reporting of irregularities. In 2025, national authorities reported 272 cases of irregularities via the Irregularity Management System (IMS), of which two classified as suspected fraud and one as established fraud.

Protection of the euro against counterfeiting

A high level of alignment with the EU *acquis* has been reached. Technical analyses 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, including on security related issues, and veto its application to join or chair several international organisations. 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. This includes those of December 2006 and December 2015.

Türkiye also failed to 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.

During the reporting period, Türkiye did not carry out any unauthorised drilling activities in the Eastern Mediterranean. In July 2026, Türkiye signed with the so-called, internationally non-recognised 'Turkish Republic of Northern Cyprus' ('TRNC') a Memorandum of Understanding on the development of an undersea natural gas pipeline without the authorization and consent of the Government of the Republic of Cyprus. It also continues to insist on its plans for an electricity interconnector with the so-called, internationally non-recognised, 'TRNC' in the areas where the Republic of Cyprus does not exercise effective control.

In November 2025, following the sixth annual review of the framework for restrictive measures in response to Türkiye's unauthorised drilling activities in the Eastern Mediterranean, the Council extended the validity of the Council Decision (CFSP) 2019/1894 until 30 November 2026 with the annex empty.

Türkiye's military exercises in the maritime zones of Cyprus continued. Flights of Turkish unmanned aerial vehicles in the flight information region and national airspace of Cyprus also continued. Türkiye upgraded further its military drone base in Lefkoniko and naval base in Bogazi, areas where the Republic of Cyprus does not exercise effective control. Türkiye also temporarily increased its military presence, including by deploying F-16 fighter jets and air defence systems, in the context of the Iran war. Harassment of Cypriot fishing vessels and illegal, unreported and unregulated fishing activities by Türkiye continued to be reported.

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Türkiye again criticised the decision of the UN Security Council (UNSC) to renew the mandate of the UN Peacekeeping Force in Cyprus (UNFICYP) for one year until 31 January 2027, without the consent of the Turkish Cypriot community. Restrictions on the freedom of movement of UNFICYP's, whose mandated authority extends across the island of Cyprus, can pose risks to the safety and security of UN personnel.

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 UNFICYP within the fenced-off area of Varosha remained, violating UNSC resolution 789 (1992).

Türkiye continued to call for the recognition of "the sovereign equality and international status of the Turkish Cypriot people" and for the recognition and for the establishment of political, diplomatic, and economic relations with the so-called, internationally not recognised 'TRNC'. The latter has been participating as an observer in the Organization of Turkic States since 2022. The EU only recognises the Republic of Cyprus as a subject of international law in line with the relevant UNSC Resolutions.

The EU remains fully committed to a comprehensive settlement of the Cyprus issue within the UN framework, in line with all relevant UNSC Resolutions and in accordance with the principles on which the EU is founded and its *acquis*. The EU has expressed, most recently in the 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 fully supports the efforts of the UNSG and its Personal Envoy on Cyprus. The EU attaches particular importance to the resumption of and progress in the Cyprus settlement talks in further strengthening EU-Türkiye cooperation. On 13 July 2026, the Commission appointed Executive Vice-President Raffaele Fitto as the Commission's Special Representative for Cyprus. He will support UN-led reunification efforts and facilitate renewed negotiations on Cyprus settlement. 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 line 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

Re-engagement between Türkiye and Greece continued. In October 2025, the two Foreign Ministers met in the margins of the Ministerial Meeting on Cross-Regional Security and Connectivity in Luxembourg. The latest round of political dialogue at the level of Deputy Foreign Ministers was held in Athens on 20 January 2026. In February 2026, the Greek and Turkish presidents co-chaired the 6th High-Level Cooperation Council to increase trade and cooperation.

On the basis of the December 2023 Athens Declaration on Friendly Relations and Good Neighbourliness, Turkish and Greek delegations met several times to discuss military confidence-building measures, complemented by meetings of coast guard authorities. The implementation of the short-stay tourist visit scheme for Turkish nationals to visit 12 Greek

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islands to promote people-to-people contacts between Greece and Türkiye was extended until April 2027.

Despite the ongoing dialogue, the unresolved issue over the continental shelf and the exclusive economic zones continued to strain bilateral relations. Türkiye continued to systematically issue unauthorised general navigational warnings and making demilitarisation claims regarding Eastern Aegean islands assigned to Greece under international treaties, thereby implicitly disputing 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 and risks affecting the ongoing dialogue and regional cooperation.

Türkiye strongly protested the transfer of Patriot batteries to a Greek island in the Aegean Sea, amid the Iranian missile offensive. Although the deployment was coordinated in NATO, it was perceived as targeting Türkiye. It also reciprocated to the transfer of Greek F-16 to Cyprus, which took place in the context of the deployment of EU Member States and UK navy to protect Cyprus after the drone attack against the UK bases on the island. The possible extension of Greek territorial waters up 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 Greek-Turkish 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* threat still holds. Türkiye declared, in August 2026, two national marine parks in the northeastern Aegean and the eastern Mediterranean, which extend predominantly beyond Turkish territorial waters into the high seas.

In 2026, Türkiye continued to object to Greece's establishment of three marine parks entirely within Greek territorial waters, and very recently, to spatial planning frameworks for tourism, renewables, industry and supply chain.

A higher number of flights of Turkish military jets over Greek islands, including inhabited ones, were reported, including in September 2026. Violations of Greek territorial waters continued to be reported, including illegal unreported and unregular (IUU) fishing activities of Türkiye's fishing vessels 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. This includes the right to explore and exploit natural resources in accordance with EU and international law, in particular the UNCLOS.

In October 2026, the Benghazi-based House of Representatives ratified the long-pending 2019 so-called Türkiye-Libya Memorandum of Understanding on delimitation of maritime jurisdiction areas in the Mediterranean. The so-called 2019 Memorandum of Understanding on the delimitation of maritime jurisdiction areas between Türkiye and the Libyan Government of National Unity (GNU) infringes the sovereign rights of third states, and does not comply with the Law of the Sea. In a Joint Statement[12] the Presidents of the European Commission and the European Council reiterated the EU's position that this agreement is null and void 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.

[12] https://www.consilium.europa.eu/en/press/press-releases/2026/10/20/joint-statement-by-the-president-of-the-european-council-and-the-president-of-the-european-commission/

In February 2026, Libya's National Oil Corporation granted exploration license to Türkiye's state-owned oil company, TPAO. *[See also Chapter 31 - Foreign, security and defence policy]*

Regional cooperation

Good neighbourly relations are an essential part of Türkiye's accession process. During 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 Eastern Mediterranean have reduced significantly since the February 2023 earthquakes, but the situation remained volatile not least because of the geopolitical and regional environment. Sustainable de-escalation has yet to be achieved, as proved by the ratification, in October 2026, of the 2019 so-called Türkiye-Libya Memorandum of Understanding on delimitation of maritime jurisdiction areas in the Mediterranean. Türkiye should avoid actions that could undermine regional stability in the Eastern Mediterranean, which is a region of strategic significance for the EU's security and stability. The EU remains committed to defending its interests and those of its Member States as well as to upholding regional stability.

Türkiye maintains strong, multifaceted relations with the Western Balkans, underpinned by deep historical, cultural and people-to-people ties. Türkiye's policy broadly aligns with the EU's strategic objectives of regional stability, Euro-Atlantic integration and economic development. The EU and Türkiye hold regular twice-yearly consultations on the Western Balkans, most recently in April 2026. The Türkiye Balkan Peace Platform initiative held its latest meeting on 18 April 2026.

Türkiye has developed strong and growing ties with the Western Balkans partners through trade, infrastructure connectivity projects and investments in sectors such as construction, transport, energy and banking. Ankara continues military and defence cooperation, providing military training, defence equipment and capacity building.

Türkiye also remains an important security actor, contributing significantly to NATO KFOR peace-keeping mission (it has held its command from October 2025 to October 2026) and to the Operation EUFOR Althea. Bilaterally, Türkiye continues to call on all countries to act against the Gülen movement and its alleged members, including through extradition requests and the closures of affiliated schools and businesses.

Türkiye and **Albania** continued to strengthen their strategic partnership, including on defence, infrastructure, and economic cooperation. Political dialogue remained active within the Strategic Cooperation Council framework. The Turkish Vice-President visited Albania and met with its President in October 2025. Economic relations continued to expand, with Türkiye being Albania's third largest trade partner in 2025. Albania-Türkiye Investment Forum held in October 2025.

Türkiye remains committed to the political unity, territorial integrity and sovereignty of **Bosnia and Herzegovina,** and expresses willingness to engage with all constituent peoples and political actors in the country, emphasising inclusivity and dialogue as key principles of stability. Türkiye maintains regular bilateral high-level political contacts, including meetings with members of the Presidency as well as trilateral consultation mechanisms, notably Türkiye–BiH-Croatia and Türkiye–BiH-Serbia.

Türkiye maintained good relations with **Serbia**. High-level political dialogue continued, notably with the visit of the Serbian President to Türkiye (February 2026) and at the Antalya Diplomacy Forum in April 2026. Disagreement remains over Türkiye's support to

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membership of Kosovo* to international organisations, such as the Council of Europe, and to Kosovo's defence capabilities.

Türkiye maintained strong cultural, political and economic ties with **Kosovo** and continued to advocate for its international recognition. Türkiye supports Kosovo's stability, territorial integrity, development and integration with European and Euro-Atlantic institutions. Türkiye supports the EU-led Belgrade-Pristina Dialogue process and held meetings with the EU Special Representative for the Belgrade-Pristina Dialogue.

Türkiye's relations with **Montenegro** remained stable, with frequent meetings. The High-Level Strategic Council agreed in 2024 – and not operationalised yet – signalled the intention to institutionalise bilateral relations at a higher level. Türkiye is a significant investor in Montenegro, particularly in tourism, real estate and banking.

Türkiye and **North Macedonia** continued to maintain close relations under the Strategic Partnership framework. High-level political dialogue remained active. In June 2026, the Turkish President hosted the Prime Minister of North Macedonia in Istanbul, where the Türkiye-North Macedonia Business Forum was also held. Türkiye remained a significant investor and trade partner in North Macedonia, particularly in infrastructure, construction and manufacturing. Defence cooperation persisted as a key pillar of the relationship, with ongoing implementation of previously concluded military cooperation arrangements, including training, capacity building and modernisation.

Türkiye's relations with **Georgia** continued to be pragmatic and cooperative, 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. Türkiye is Georgia's largest trading partners after the EU and key investor. Both countries actively cooperate on economy, energy and connectivity, including the development of the Middle Corridor. In May 2026, Türkiye decided to resume direct bilateral trade with Armenia via Georgia. The strategic trilateral cooperation between Türkiye, Georgia and Azerbaijan continues at high level with a view to enhancing regional energy and transport connectivity, as well as security cooperation. The latest meeting took place in Istanbul in June 2026.

Türkiye and the Republic of **Moldova** maintained strong diplomatic relations and their strategic cooperation. Türkiye supports Moldova's sovereignty and territorial integrity. Türkiye is an important trading partner for Moldova. High-level exchanges and cooperation in the Black Sea region continued as well as Turkish support for projects in Gagauzia. President Erdogan met with President Sandu on the sidelines of the Antalya Diplomacy Forum in April 2026.

Türkiye's relations with **Ukraine** remained of strategic significance, and several high-level contacts took place. Türkiye has consistently supported Ukraine's sovereignty and territorial integrity, emphasising its facilitation and potential mediation role. This includes brokering grain exports corridor and prisoner exchanges, as well as hosting three rounds of direct talks between Russia and Ukraine in Istanbul in 2025. Cooperation in the defence area continued. Türkiye has expressed strong interest in Ukraine's reconstruction, marked by the establishment of bilateral 'Reconstruction Task Force' mechanism. Türkiye also takes part in the 'Coalition of the Willing' initiative.

4. RESILIENCE, SECURITY AND DEFENCE

Türkiye as an EU candidate country, a NATO and OSCE member and a close neighbour in a

* 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.

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crucial geostrategic location, plays an important role in European security and the cross-regional connectivity agenda. The EU-Turkey Customs Union is also an important asset contributing to the resilience and diversification of EU supply chains.

Democratic resilience

Türkiye's democratic resilience indicators have deteriorated sharply. Trust in Turkish media continued falling in the past year, contributing to Türkiye's vulnerability to FIMI further exacerbated by its geopolitical position, exposure to regional information conflicts and polarised political landscape. Türkiye's digitally active and young population, with widespread social media use, also amplifies the country's susceptibility to FIMI, making its online sphere a prime target environment for the spread of disinformation. Due to shrinking civic space and difficulties in accessing funding, Türkiye's independent fact-checking community has been gradually eroding.

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's information space, with penetration by Russia-linked disinformation networks. In addition, Iranian and Chinese FIMI operations are also visible in the Turkish information environment.

The Presidency's Directorate of Communications operates a Centre for Countering Disinformation, since 2022, however independent journalism associations and civil society have criticised the organisation for its lack of transparency and political bias.

Türkiye is currently confronting a range of hybrid threats, including cyberattacks, AI-driven disinformation campaigns, vulnerabilities in critical infrastructure, and the potential manipulation of migration flows. This complex security landscape is further complicated by ongoing regional conflicts and the illicit proliferation of advanced weaponry by armed groups. Maritime security remains a significant concern, particularly with threats from unmanned aerial vehicles (UAVs) and unmanned surface vessels (USVs) and security and environmental risks posed by Russia's 'shadow fleet'. The situation in the Black Sea region, amid the ongoing war in Ukraine, remains volatile.

Economic security and resilience

Türkiye's **supply chains resilience** is shaped by a diversified industrial base building on comparative advantages in transport equipment, machinery, textiles and apparel. Its strategic geographic location also offers access to alternative trade and transport corridors, improving connectivity and reducing concentration risks exposed by recent geopolitical tensions and supply disruptions. Türkiye's integration into European value chains remains a major asset. Thanks to the EU-Turkey Customs Union, close proximity to EU markets and a dynamic business ecosystem (with flexible sourcing and logistics networks), Türkiye is well positioned to contribute to the resilience and diversification of EU supply chains. At the same time, Türkiye is facing marked vulnerabilities such as energy dependence and macroeconomic volatility.

Türkiye has taken actions to strengthen the **resilience of its energy supply chains.** It has pursued a mix of import diversification policies and infrastructure investment (increasing domestic gas production, LNG re-gasification and storage capacity, and upgrading transmission and distribution networks). Regulatory reforms have also aimed to improve market flexibility and secure long-term supply contracts. However, dependence on imported hydrocarbons from Russia remains significant, representing a concern for the EU. Further progress in strengthening the resilience of its energy supply chain will require Türkiye's sustained investment, stronger private sector participation and continued regulatory consistency.

Similarly, Türkiye is also advancing the development of its **Critical Raw Materials (CRM) supply chains**. In 2025 the government published its first Critical and Strategic Minerals

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Report, identifying 37 key minerals and establishing a supply risks assessment framework. A comprehensive CRM Strategy is now being finalised. Türkiye is already a major supplier to the EU, providing 99% of its boron, 63% of its antimony (63%) and 51% of its feldspar. The Beylikova Rare Earth Elements Deposit, discovered in 2022, is viewed as a strategic asset for future supply-chain resilience. Still, significant constraints remain, including limited refining and processing capacity, dependence on foreign technologies and exposure to the global concentration of rare earth processing.

As regards **value added inbound investments**, despite its large economy, strategic location, and diversified industrial base, Türkiye has not yet fully realised its **FDI potential**, with its share of global FDI inflows remaining modest at 0.8%. To address this, Türkiye has introduced several initiatives to attract value added foreign direct investment. These include the FDI strategy for 2024-2028, the HIT-30 Programme launched in July 2024, a new incentive scheme adopted in May 2025, and the 'Century Investment Program' announced in June 2026. Nevertheless, high-tech FDI still represents only a limited share of total FDI ranging from single digits to low teens depending on the definition used.

Türkiye has also made Artificial Intelligence (AI) a strategic priority. On 13 June 2026, it adopted an ambitious **Artificial Intelligence Action Plan** aiming to reach 1 gigawatt data centre capacity by 2030, to train 10 000 advanced AI specialists and to provide AI literacy training to 5 million citizens. A new 'AI voucher program' will help small and medium-sized enterprises deploy smart manufacturing, energy, and healthcare technologies. In parallel, the strategy earmarks at least 2% of public investment programmes for AI-related projects. Türkiye's latest industrial strategy adopted in March 2025 is under implementation, with AI capacity building and the deployment of AI applications identified as priorities.

Overall, Türkiye is relatively resilient to **economic coercion** thanks to its diversified economy, broad international partnerships, large domestic market and considerable geopolitical relevance. However, key vulnerabilities remain in several areas, particularly its dependence on external financing, imported energy, and certain advanced technologies. Strengthening economic diversification, attracting high-tech investment and reducing strategic dependencies remain important policy objectives.

Defence and defence industrial dimension

Türkiye continues to maintain the second largest army in NATO, while over recent years, its defence industry has seen a significant increase in both production and exports. As a result, the country has become an important arm supplier, with Ukraine as one of its principal arms export markets. The Middle East crisis has also triggered expanded defence cooperation with the Gulf countries.

Türkiye's **defence industrial sector** is supported by a broad network of state-owned and private companies, domestic supply chains, and government-backed R&D programmes. Türkiye's domestic production covers key segments, including artillery and rocket ammunition, UAVs and USVs, armoured personnel carriers and electronic warfare systems. The sector's growth could contribute to Türkiye's strategic objective of strengthening its domestic industry while expanding exports, particularly to emerging markets, reducing its reliance on external suppliers, and leveraging arms export to forge new international partnerships.

Turkish companies are increasingly looking at the EU market to expand their sales and, at the same time, to gain access to know-how and technology transfers. Turkish companies are also opening joint production facilities and concluding wide-ranging memoranda of understanding joint projects with several EU Member States.

In the framework of **the European Defence Fund** (EDF) and **the European Defence Industrial Programme** (EDIP), entities established in the EU or in an associated country and subject to control by Türkiye or by a Turkish entity could only be eligible for funding if guarantees provided by the EU Member State or associated country of establishment are

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made available to the Commission. So far this has only materialised on three occasions.

Civil protection and disaster resilience

Türkiye has continued strengthening its disaster risk management and civil protection efforts to enhance its resilience. It remains a relevant contributor to cross-border emergency response and an active Participating State in the Union Civil Protection Mechanism (UCPM). While its operational capacities are advancing, Türkiye should take further steps to ensure that its national and local civil protection systems can respond effectively to **natural and human-induced crises**. Continued efforts are also needed to reinforce prevention and preparedness, including population awareness and infrastructure resilience.

5. 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 horizontal framework for the free movement of goods is largely in place. Though there was intensified engagement under the High-Level Trade Dialogue in the reporting period, no progress was made to remove specific EU origin products from the scope of Turkish Import Surveillance System, and in fact new measures were introduced covering a large range of products subject to surveillance. This needs to be addressed, with the aim of ultimately removing all goods with EU origin from the system. Most of the previous ad hoc issues for EU economic operators under the risk-based TAREKS system for product safety controls have in the meantime been addressed. On preferential quotas for live bovine animals and beef meat for EU operators, the need for a transparent administration of the quota system remains an issue (*see Chapter 11, Agriculture*). No progress was 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 certificates. Local content requirements for several products, including renewable energy (*see Chapter 15 – Energy*), were retained.

Türkiye needs to resolve all outstanding trade barriers between the EU and Türkiye as listed in the Access2Market database; currently 14 in total.

Non-harmonised areas

Türkiye's mutual recognition legislation in the non-harmonised areas is in line with the EU *acquis*. Under the Customs Union, Türkiye notifies technical legislation under the Technical Regulation Information System (TRIS). However, Türkiye notified only one legal act in 2025, and three in 2026. 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 area: quality infrastructure

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Türkiye is aligned with the EU *acquis* on standardisation, technical regulations, conformity assessment, accreditation, metrology and market surveillance. In the area of **standardisation**, the national Standards Institute (TSE) is a full member of European standardisation organisations CEN and CENELEC. By the end of the second quarter of 2026, it had adopted 24 999 national standards aligned with European standards. The rate of harmonisation with both CEN and CENELEC standards is 100%.

In the area of **accreditation and conformity assessment**, Türkiye has 76 notified bodies, nine recognised third-party organisations, and two technical assessment bodies in place. The Turkish Accreditation Agency (TÜRKAK) is a member of the European co-operation for Accreditation (EA). In 2025 it digitalised its application processes and document workflow and is increasing the number of its on-site assessments. TÜRKAK participates actively in the work of EA, holding convener positions in the Artificial Intelligence Working Group and Laboratory Committee Technical Network.

While Türkiye implements **market surveillance** in compliance with the EU *acquis* and submits its annual programme to the European Commission, the coverage and effectiveness of market surveillance measures should be strengthened. Although the Ministry of Trade published a taxonomy document in December 2025 serving as a guideline for enterprises engaged in e-commerce*,* there is still limited market surveillance on e-commerce activities. According to the market surveillance report for 2025, a total of 302 675 products were checked by market surveillance authorities in 2025 representing a 15% increase as compared with 2024.

Türkiye has not yet aligned with IMERA (Internal Market Emergency and Resilience Act).

Harmonised area: sectoral legislation

On the EU '**new and global approach**' product *acquis*, Türkiye adopted amending legislation designed to align with the latest *acquis* on noise emission by outdoor equipment, and on eco-design requirements for local space heaters and fans.

On the EU **'old approach'** product *acquis,* Türkiye adopted new legislation on motor vehicles, agricultural and forestry vehicles and two- or three-wheel vehicles and quadricycles designed to further align with the EU *acquis*. On chemicals, Türkiye remains partially aligned with the EU Regulation on Registration, Evaluation, Authorisation and Restriction of chemicals (REACH). Türkiye remains fully aligned with the EU Classification, Labelling and Packaging Regulation (CLP) and Good Laboratory Practice (GLP) *acquis.*

On medicines for human use and veterinary medicinal products, Türkiye issued amending legislation on marketing authorisations, postponing the deadline for the completion of authorisations for radionuclide generators, kits, radionuclide precursors and radiopharmaceuticals and the deadline for the temporary authorisation of allergen products manufactured in the EU and circulating on the EU market. An amending legislation on traditional herbal medicines was also adopted. Türkiye does not accept EU good manufacturing practice certificates on medicines for human use. While Türkiye has a regulatory data protection regime in place, in the area of pharmaceuticals this regime is not aligned with the EU *acquis*.

On **procedural measures**, while Türkiye does not fully align with the EU *acquis* on drug precursors, it has a stringent system for licensing and regulation of these substances. Though licensing procedures are in place in the area of firearms, Türkiye still needs to complete alignment with the EU *acquis* on the control of the acquisition and possession of weapons. There were no developments on alignment with the EU *acquis* on the return of cultural goods unlawfully removed from the territory of a Member State.

On **anti-corruption**, the product safety law and regulations on conformity assessment bodies and notified bodies, market surveillance and accreditation contain rules on

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transparency, impartiality and prevention of conflicts of interest. The Turkish Accreditation Body, TÜRKAK has an ethical commission and ethical guidelines in place.

Chapter 2: Freedom of movement for workers

Nationals 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 worker nationals of that Member State.

Regarding **access to the labour market**, restrictions on employment in certain occupations requiring Turkish citizenship remain. In 2025, a total of 349 961 work permits were issued including for citizens from more than 13 EU countries, compared with 300 852 in 2024.

There has been no development on access to the labour market or in preparing for future participation in the **European Employment Services Network (EURES)**.

Türkiye still maintains six labour force agreements with EU Member States. Progress towards alignment with the European Skills, Competences, Qualifications, and Occupations classification has been limited.

On the **coordination of social security systems**, one Social Security Agreement with Slovenia was signed in the reporting period, bringing the total number of bilateral social security agreements concluded with EU Member States to 16.

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**. 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. Türkiye still maintains a regulatory postal monopoly. Systems for accounting separation are not implemented at the universal service provider. There are currently 61 postal operators active in the postal market. Türkiye also needs to ensure that the national regulatory authority (the Information and Communication Technologies Authority) is legally separate from, and operationally independent of, the postal operators, and endowed with the appropriate powers and means to monitor and enforce compliance with the postal market rules.

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 2026, the number of occupations requiring certification is 244, while the number of national occupational standards increased to 961 and 701 national qualifications were aligned with these standards. The Ministry of Labour and Social Security published a communiqué in March 2026, which bans the recruitment of workers in 40 professions categorised as dangerous and very dangerous without the mandatory certification after March 2027, unless the workers have graduated from a formal training programme specific to the occupation. Some regulated professions remain reserved for Turkish nationals, and language requirements for access to certain professions have not been removed. For the seven

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sectoral professions for which the EU has common minimum training requirements (medical doctors, dental practitioners, nurses responsible for general care, midwives, pharmacists, veterinary surgeons, and architects), Türkiye needs to intensify its efforts to align with requirements from the EU *acquis*. 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*. It is possible to apply online for the recognition and equivalence of higher education qualifications.

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**, there were no developments in the reporting period. Restrictions on foreign ownership remain in certain sectors including broadcasting, education, transportation, financial services, the electricity market and real estate. Türkiye's legislation on real estate acquisition by foreigners remains discriminatory as it does not apply to all EU nationals. Immovable property acquisition by citizens of neighbouring countries in border provinces continues to be restricted for national security reasons. The obligation for exporters to sell their foreign-earned incomes to the central bank was initially increased temporarily in May 2025 from 25% to 35% and this rate has been extended multiple times, most recently until 31 January 2027.

In March 2026, the central bank further improved the standards on **payment systems**, by introducing amendments to a by-law on payment services, electronic money issuance and payment service providers. The amendments enable balances held in payment and electronic money safeguarding accounts (except for accounts opened in foreign currency) to be placed in yield bearing accounts, allowing users to manage their financial transaction easily and more securely.

On **fight against money laundering and terrorist financing**, the new 2026-2030 National anti-money laundering and countering the financing of terrorism (AML/CFT) and confiscation strategy was adopted on 4 July 2026. Further efforts included the adoption of an action plan on illegal online betting, gambling and games of chance on 1 November 2025. The Action Plan builds on the 2025 updated AML/CFT National Risk Assessment of Türkiye, which assessed fraud and illegal betting as high-risk. Türkiye's financial intelligence unit (MASAK) is responsible for the coordination of these efforts.

Stricter AML/CFT rules for cryptocurrencies and related service providers have been enforced, with MASAK updating its guidance for crypto-asset providers on 30 September 2025 as a follow-up for enforcement of obligations introduced earlier in 2025.

Türkiye needs to further align with the EU *acquis*, including the latest versions of the Anti-Money Laundering Directive and the Transfer of Funds Regulation, to strengthen its AML/CFT framework. Türkiye should also continue strengthening supervisory capacities, notably at regional level. A regulatory gap remains in ensuring a proportionate and risk-based approach to non-profit organisation monitoring.

Türkiye's report from the Financial Action Task Force's (FATF) fifth round of mutual evaluations was adopted in June 2026. In terms of technical compliance, Türkiye was found to be compliant with 38 of the FATF's 40 Recommendations. In terms of effectiveness, Türkiye was assessed as "Substantial" for 3 of the 11 Immediate Outcomes (IOs) and "Moderate" for the remaining 8.

(For criminal aspects, See Chapter 24 – Justice, freedom and security).

Chapter 6: Company law

The EU has common rules on the formation, registration and disclosure requirements of a

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company, with complementary rules for accounting and financial reporting, and statutory audit.

On **company law and corporate governance**, the legislation on domestic mergers and divisions and shareholders rights, including long-term shareholder engagement and the use of digital tools and processes in company law, are not fully aligned with the EU *acquis*. On business registrations, Türkiye lacks provisions requiring all limited liability companies to publish annual accounts. Türkiye should also complete alignment with the Directive on corporate sustainability due diligence (CSDDD).

On **company reporting**, Türkiye Sustainability Reporting Standards (TSRS) and Climate Related Disclosures Standards are not fully aligned with the EU *acquis* but satisfy the reporting thresholds that apply under the Corporate Sustainability Reporting Directive. While banks are obliged to report, the Public Oversight, Accounting, and Auditing Standards Authority (POA) granted an exemption to portfolio management companies and allowed the incorporation of sustainability reports into annual activity reports in 2025. In March 2026, a Presidential decree extended the scope of mandatory independent audits to include domestic natural gas companies in which State-Owned Enterprises hold a controlling stake (over 50%). Türkiye should fully align national legislation with the Accounting Directive and Corporate Sustainability reporting.

On improving the **gender balance** among directors of listed companies and related measures, no progress was made in the reporting period.

Chapter 7: Intellectual property law

The EU has to a large extent harmonised rules for the legal protection and enforcement of copyright and related rights, as well as of industrial property rights, including trademarks, designs, patents and related supplementary protection certificates (SPCs), geographical indications (GIs), including craft and industrial GIs.

On **copyright and related rights**, the Turkish law still needs to be amended to provide stronger protection that reflects technological developments to align with the Directives on copyright and related rights. While legislation to ensure legal protection against the circumvention of technological protection measures for authors, performers and phonogram producers, or protection of rights management information exists, there are notable shortcomings in its implementation. 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 remain to be addressed. Persistent online piracy coupled with ineffective enforcement hinder economic opportunities for domestic and foreign rightsholders in Türkiye.

On **industrial property rights**, particularly trademarks, the lack of clarity and consistency in consideration of 'bad faith' undermines the effectiveness of cancellation procedures**.** The Turkish Patent and Trademark Office has continued strengthening its administrative and operational capacity since it became responsible to examine requests for revocations. However, stakeholders still report expensive and lengthy procedures to revoke, oppose and invalidate trademarks and continue to signal that the trademark registration system in general remains unpredictable. Türkiye lacks a legal framework on supplementary protection certificates. The regulatory data protection regime in place since 2005 excludes biologics and combination products. The protection of undisclosed test data submitted for pharmaceutical and agrochemical marketing licensing remains inadequate by the standards of the EU *acquis*.

On **judicial enforcement**, criminal courts rarely impose sufficiently severe fines as provided in existing legislation in cases of large-scale commercial industrial property infringements. Lengthy litigation procedures, including appeals, remain inefficient. Persistent challenges and inconsistencies remain in the adjudication of preliminary injunctions and with regard to claims for monetary compensation, as well as in storage and destruction procedures

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including in their relation to their associated costs. The excessive reliance on expert witness statements further complicates proceedings. Despite recent improvements in some cities, challenges remain in obtaining search and seizure warrants, even where right holders present strong evidence of counterfeiting. Enforcement authorities must enhance the efficiency of their response against industrial property infringements.

Certain gaps in the **customs enforcement** legislation persist, preventing full alignment with the EU *acquis.* Right holders' applications to customs for seizures have increased from 3 031 in 2024 to 3 139 in 2025. There is still scope to strengthen customs enforcement against counterfeit goods, including goods in transit and exports. According to the latest EU report on the enforcement of intellectual property rights, Türkiye's position has deteriorated, becoming the second largest country of provenance for infringing goods detained in 2024 with the largest share of clothing (55.27%) and labels, tags and stickers (9.2%).

Further efforts are needed to increase public awareness on the risks of counterfeiting and piracy, particularly on the impact on health, safety, employment and rule of law while highlighting the economic benefits of IPR-intensive industries. The continued significant flow of counterfeit goods into the EU indicates that stronger political commitment is required to enforce intellectual property rights both inland and at the border.

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 competition.

Antitrust and mergers

The **legal framework** is 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 is largely in place. The relevant legislation still needs to be aligned to ensure full compliance with the Vertical Block Exemption Regulation. In 2025, the Turkish Competition Authority (TCA) renewed the communiqué on the Block Exemption for the Specialization Agreements to align with the relevant EU *acquis*.

The **institutional framework** is in place. The Law on the protection of competition is enforced by the Turkish Competition Authority, which retains financial and administrative autonomy and possesses adequate enforcement capacity. In 2025, overall **implementation** was effective. More than 100 decisions were taken in antitrust cases (104 compared to 166 in 2024) along with 10 exemption/negative clearance decisions (unchanged from 2024). Additionally, more than 400 decisions were made on merger/acquisition/joint venture/privatisation (416, up from 311 in 2024). In 2025, the TCA imposed fines for infringements of competition law totalling TRY 8.3 billion (EUR 156 million), marking a slight increase from TRY 7.5 billion (EUR 141 million) in 2024. The number of *ex officio* investigations initiated by the TCA fell to 26 in 2025, significantly below the two-year average of 75. In 2025, Turkish courts upheld 92% of the 102 judgements rendered in appeals against TCA decisions.

State aid

No progress was made on the **legislative framework**. Overall, Türkiye's Law on the monitoring and supervision of State aid (State aid Law) 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 State aid Law's implementation.

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

The absence of a transparent State aid inventory covering all aid schemes, including the amount (or budgeted amount) of the state support provided and foregone revenues, remains a cause for concern. The transparency of state aid schemes further deteriorated following a Presidency decision from November 2024 which allows the government not to publish project-based investment support decisions. Since then, the government has not officially shared any project-based incentive decisions (if taken). Such deficiencies are not addressed by the current incentive scheme. This scheme preserves the selective Project-Based Investment Programme used for large-scale investments, which also includes the High Technology Investment (HIT-30) Programme introduced in July 2024. The latter commits to supporting projects in 30 priority technology areas.

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**, the Banking Regulation and Supervision Agency (BDDK) adopted its strategic plan for the period 2025-2028, built around three pillars: strengthening trust and stability in financial markets, ensuring an inclusive, competitive and efficient development track, and enhancing institutional capacity for more effective regulation and supervision.

There were no developments in aligning with the EU *acquis*, including the latest versions of the Capital Requirements Regulation and Directive (CRR3 and CRD6) and the Bank Recovery and Resolution Directive (BRRD2).

On **insurance and occupational pensions**, the Turkish Insurance and Private Pension Regulation and Supervision Agency (SEDDK) published revised regulations governing insurance support service providers in July 2026. The revised regulations introduced a new authorisation and regulatory regime for insurance support service providers operating particularly in the fields of claims managements, 24/7 assistance services and claims investigation. In October 2025, the Insurance and Private Pension Regulation and Supervision Agency amended the regulation on private health insurance to expand consumer rights.

The **financial market infrastructure** continues to be partially aligned with EU *acquis*. In December 2025, the Capital Markets Board (CMB) increased the financial threshold applicable to companies conducting an initial public offering for the first time.

On **securities markets and investment services** the CMB updated the criteria for the designation of a professional client by investment firms in December 2025 and in February 2026, crypto-asset service providers and crowdfunding platforms were formally integrated into the CMB's regulatory supervision. As a result, these entities are now required to apply for CMB membership within three months after obtaining their authorisation certificate. In November 2025, the CMB underwent a re-structuring aimed at increasing efficiency in regulation supervision and direction of market development.

On **sustainable and digital finance**, the National Green Finance Strategy and Action Plan (2026-2029) was adopted in July 2026 in view of strengthening the country's green finance

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ecosystem, enhancing the resilience of financial markets to climate-related risks, and improving the investment environment in support of sustainable development goals.

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)*. Market surveillance of e-commerce also remains limited (*see Chapter 1 – Free movement of goods*).

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

Public health

On **horizontal aspects**, Türkiye started implementing the One Health Strategy by adopting the National Action Plan to Combat Antimicrobial Resistance (2026-2030), prepared under the coordination of the Ministry of Health to address public health threats. Türkiye continued strengthening its preparedness for emergencies and public health threats. Türkiye also continued implementing healthy lifestyle programmes, along with regulatory changes aimed to reduce the patient caseloads for family doctors and strengthen collaboration between the Ministry of Health and the Ministry of Social Services.

On **e-Health**, Türkiye integrated new digital health platforms and health data processing activities. Mobile healthcare services for sexual and reproductive health were introduced during the reporting period.

Regarding **tobacco control,** Türkiye continues implementing its Tobacco Control Strategy and Action Plan (2024-2028).

Türkiye has made some progress in addressing **cross-border health threats**.

Progress continued on **communicable diseases**, with a National Medical Entomology and Vectoral Diseases Research Laboratory being established in late 2025. On **non-communicable diseases,** population-based **cancer** screenings including HPV-DNA testing for cervical cancer, faecal occult blood testing for colorectal cancer, and mammography for breast cancer continued to be offered free of charge and the number of Cancer Early Diagnosis, Screening, and Education Centres (KETEM) across Türkiye has increased to 488. Regarding **cardiovascular health**, Türkiye continues implementing its National Cardiovascular Disease Prevention and Control Programme, which runs until the end of 2026. Türkiye is encouraged to use the EU's Safe Hearts Plan as a reference for its next cardiovascular health programme. On **blood, tissues, cells and organs**, Türkiye is not fully aligned with the EU *acquis*. Legislation on products derived from human tissues and cells and centres related to these products entered into force in September 2025. Furthermore, an online organ donation system was established during the reporting period.

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Türkiye is not aligned with the EU *acquis* on **patients' rights in cross-border healthcare.**

On **medical devices** and ***in vitro* diagnostic medical devices**, Türkiye is aligned with the EU *acquis* in the context of the EU-Turkey Customs Union.

On **mental health,** the number of community mental health centres and healthy life centres increased to 191 and 348 respectively. Türkiye does not have a mental health law. Türkiye is encouraged to use as reference the Commission Communication on a comprehensive approach to mental health adopted in 2023.

On **health inequalities,** sexual and reproductive health disparities remain. Adolescents' access to sexual and reproductive health services and rights remains a critical issue. Despite progress made in maternal and infant mortality with new programmes to target risky pregnancies, the 'Year of the Family' initiative and campaigns against c-sections resulted in a deterioration of women's reproductive rights, with persistent barriers to access to services, including family planning and safe maternal healthcare, especially for rural, Kurdish, and refugee women. Access to contraception and abortion services remain limited. Infant mortality decreased from 9 to 7.7 per 1 000 live births.

Vulnerable groups, such as LGBTIQ, have limited access to healthcare services. Since 1 January 2026, the introduction of mandatory health contribution fees and healthcare service payments has substantially reduced access to healthcare for Syrians under Temporary Protection in Türkiye.

Significant needs remain regarding healthcare in the regions affected by earthquakes in 2023, especially for mental health and reproductive health. Accessibility in hospitals is regulated under a Law on persons with disabilities and Ministry of Health accessibility guidelines. Hospitals are expected to comply with national accessibility standards and may receive an accessibility certificate after inspection. Türkiye is encouraged to use as reference the new EU guidelines to improve healthcare access for persons with disabilities.

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*). Türkiye does not have a specific anti-corruption plan on public health, but horizontal anti-corruption measures apply to the healthcare sector.

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 amended its Electronic Communication Law in December 2025 to require verified identity documents for phone subscriptions and to ensure that providers keep user data up to date. The amendments also allow prosecutors to order the suspension of mobile lines and request user information without a court order in theft or fraud investigations. Türkiye needs to ensure that these measures are applied with appropriate safeguards as they could affect end user's rights. Further changes were made in the Regulation on Authentication and Consumer Rights Regulation on the Electronic Communications Sector in June 2026 with the motivation of preventing counterfeit lines. While authentication processes were rearranged in the establishment of subscription agreements with the new regulation, verification methods for foreign subscribers were

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clarified, line ownership controls were tightened and the activation status of subscribers was made mandatory to be verified regularly.

Türkiye has yet to align with the European Electronic Communications Code and to address remaining concerns over the financial and administrative independence of the regulatory authority, as well as the lack of transparency in the Telecommunication Regulatory Authority's revenue transfers. A competitive and consumer-friendly telecommunications market is not yet fully developed, and further regulatory and administrative steps are needed.

The fixed broadband market remains insufficiently competitive, with penetration still below the OECD average. Mobile broadband use continued to grow, as did LTE subscribers, reaching 91.2 million by the end of 2025. Türkiye completed its 5G auction in October 2025, allocating spectrum in the 700 MHz and 3.5 GHz bands. The 5G roll-out started on 1 April 2026. Concerns remain regarding the use of non-trusted vendor equipment in network infrastructure, and implementation of the 5G Cybersecurity Toolbox should be prioritised.

On **digital services**, Türkiye's e-commerce market continued to grow and the legal framework was amended in March 2026 to update monetary thresholds online platforms. Custom procedures for cross-border e-commerce were revised in January 2026. Türkiye adopted an Action Plan for Empowering Children in the Digital World in February 2026. The Turkish Law regulating Online Content and Combating Crimes Committed via Such Content was amended in May 2026 and restrictions were brought on gaming platforms. The amending law also banned children under the age of 15 from creating social media accounts and imposed strict parental control and age-verification requirements on platforms. Türkiye has not yet aligned with the Digital Services Act and Digital Markets Act.

The existing digital services legislation, including social media, disinformation and cybersecurity rules, needs to be revised to ensure compatibility with the EU Charter of Fundamental Rights and key principles of the EU *acquis*. The e-Government Gateway continued to expand to 9 305 services and 69.09 million users as of June 2026. Further efforts are required to align with the European Interoperability Framework and the Interoperable Europe Act.

On **media**, regarding digital television broadcasting, Türkiye's objection to a new unified Cypriot digital television broadcasting plan below 700 MHz under the ITU Geneva 2006 Agreement remains unresolved. This continues to deprive Cyprus of the necessary regulatory protection against interferences from neighbouring countries. Furthermore, Türkiye needs to revise the legislation regulating radio, television and on-demand media services to clarify its scope, definitions, and licensing criteria, and to address controversial provisions relating to jurisdiction and independence of RTÜK, which persisted and were not addressed *(see Chapter 23 – Judiciary and fundamental rights).*

On **Artificial Intelligence**, Türkiye should develop the necessary legal governance and enforcement structures in line with the EU Artificial Intelligence Act. Türkiye adopted an Artificial Intelligence Action Plan in June 2026, aiming to reach 1 gigawatt data centre capacity by 2030, training 10 000 advanced AI specialists and providing AI literacy training to 5 million people. Implementation of the industrial strategy with AI priorities continues but no concrete progress was reported.

No progress was reported on **data**, where Türkiye has not yet adopted 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**, Türkiye's compliance with the eIDAS Regulation is still pending. The institutionalisation of the Cybersecurity Presidency was completed during the reporting period and the Cybersecurity Council held its first meeting in May 2026. A December 2025 Presidential decree expanded its mandate to digital government and public-sector AI applications under its authority. Türkiye needs to continue the implementation of

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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.

In relation to the protection of minors online, a Safer Internet Centre was established in Türkiye.

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.

In the area of **indirect taxation**, Türkiye continues to have a wide range of products that are subject to a 1% value added tax (VAT), which is not in line with the EU *acquis*. Türkiye applies a 20% 'standard' VAT rate, a 10% 'reduced' VAT rate and, for some goods, a 1% VAT rate which falls below the 'minimum EU reduced rate'. The legislation governing the structure, exemptions, special schemes and the scope of reduced rates is not fully aligned with the EU *acquis*.

In terms of specific and proportional tax elements, Türkiye's cigarette **excise duty** legislation diverges from the EU *acquis,* while the overall level of taxation (*ad valorem*) on cigarettes is comparable to EU levels. Excise duty legislation on alcohol and alcoholic beverages also differs from the EU *acquis*. Although Türkiye equalised excise duty on domestic and imported products in 2018, it reinstated in a differential excise duty between raki and similar spirits in 2024, a measure that was maintained over the reporting period. Excise duties on some of the energy products remain lower than the EU's minimum rates. Contrary to the EU *acquis,* coal, coke and electricity are not subject to excise duties, while kerosene is zero rated. Türkiye engages in administrative cooperation in the area of excise duty.

On **direct taxation**, Türkiye continues to implement 25% corporate income tax, rising to 30% for the financial sector. Under the new tax regime adopted in the reporting period, manufacturing and agriculture industries benefit from a reduced rate of 12.5%. Türkiye keeps applying a minimum 15% corporate income tax for large multinational enterprises, a 10% local minimum corporate income tax and a 30% general corporate income tax for public-private partnerships. The 1% additional tax on service providers for goods purchased in online marketplaces is still in force, while a new 95-100% corporate income tax deduction has been introduced for qualified service centres.

The income tax exemption implemented since 2022 for the minimum wage continued, including the tax on all wages corresponding to the minimum wage. In 2025, TRY 33.6 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. In 2026, a new tax regime was enacted, offering 5% (scalable to 0%) tax on repatriated assets and a 20-year income tax exemption for new residents.

On **administrative cooperation and mutual assistance,** the OECD Global Forum on Transparency and Exchange of Information for Tax Purposes qualified Türkiye as 'largely compliant' with the exchange of information on request. However, Türkiye remains listed in Annex II of the EU Council Conclusions on non-cooperative jurisdictions for tax purposes under criterion 1.1 (automatic exchange of tax information on financial accounts), as it is still not fully compliant with the relevant requirements. Consequently, in February 2026, the Council reaffirmed its call on Türkiye to establish the outstanding automatic information exchange relationships with one Member State to fulfil this criterion.

The **operational capacity** of the tax administration has remained stable. The number of staff members working in the Turkish Revenue Administration in 2026 is 667 at the central level and 40 217 at the local level.

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Regarding **digitalisation**, the Turkish Revenue Administration uses an electronic document management system. The action plan to combat the informal economy (2023-25) lacked performance indicators and a publicly accessible system for monitoring implementation. Türkiye has not yet developed an updated action plan to tackle the informal economy in 2026 and beyond.

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**, despite a relatively tight monetary policy stance, inflation remains very high and well above the central bank inflation target of 5%, which is jointly set with the government. The interim inflation targets for 2026-2028 have been revised upwards amid geopolitical tensions in the Middle East. The FX-protected lira deposit scheme was terminated, removing a major contingent liability and source of financial risk. The central bank has been strengthening efforts to increase credibility regarding its statutory independence and monetary policy stance, including by enhancing transparency and communication with the public to better anchor inflation expectations. However, the central bank changed its approach by providing point estimates rather than forecast band range. Concerns over the institutional underpinning of central bank independence persist, especially with the President of the Republic maintaining extensive legal powers in the appointment of the central bank governor and board members.

As regards **economic policy**, further progress was made in presenting a more realistic macroeconomic framework to the European Commission, with ongoing efforts focused on further enhancing the coherence among key macroeconomic targets. However, the main policy documents do not incorporate the presentation of alternative macroeconomic and fiscal scenarios. Türkiye is not aligned with the Directive on Requirements for Budgetary Frameworks. In particular, it has neither national fiscal rules nor an independent fiscal institution. Although the fiscal framework lacks strong anchors, budgetary outcomes indicate the authorities' preference for fiscal discipline. The transmission of excessive deficit procedure notifications and government finance statistics remains incomplete and lack transparency *(see Chapter 18 - Statistics).*

The **Economic Reform Programme** (2026-2028) was submitted on time. The structural reform Section improved with more detailed impact assessments of the proposed measures. The policy guidance set out jointly in the conclusions of the Economic and Financial Dialogue of May 2025 has been partially implemented. Türkiye was not represented at the Economic and Financial Dialogue of May 2026, but it participated in the process and endorsed the conclusions.

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 inclusion, social protection and social dialogue at European level.

In the field of **labour law**, Türkiye's legislation is not yet fully aligned with EU legislation, including recent directives on minimum wage and pay transparency. For the existing labour legislation, implementation challenges continue with limited inspection coverage and persistent informal employment. In 2025, the number of labour inspectors remained at 916. Enforcement falls short especially in working time compliance, occupational safety and health, and collective labour rights. Women, young people, migrant workers, and those in non-standard employment face disproportionate risks of exploitation and rights violations. Labour force participation of children aged 15-17 rose to 25.5% in 2025, up from 24.9% in the previous year. There is still no new national programme on the elimination of child

labour. A stronger focus regarding child labour is needed for children in vulnerable situations, including refugee and Roma children.

On **health and safety at work (OSH)**, the regulation in relation to the working procedures on National Occupational Health and Safety Council has been adopted on 20 January 2026. Social partners' involvement has been improved with the revitalisation of the National Occupational Health and Safety Council for the first time since 2018. An amendment to the work equipment health and safety regulation tightened periodic control requirements and clarified inspector qualifications, partially addressing EU Directive 2009/104/EC on the use of work equipment. Broader gaps in enforcement and addressing emerging risks, like automated equipment, remain. Construction remains the most persistent high-risk sector for fatalities. Türkiye continues to face challenges in the reporting and recognition of occupational diseases, with officially recorded cases significantly underrepresenting actual incidence. Independent sources report 2 105 fatalities at work in 2025, 94 of them being children. Concerns persist on the MESEM vocational training programme regarding the workplace risks for minors and the lack of adequate safeguards.

Türkiye is continuing its preparatory work on the European Child Guarantee and has nominated a new child guarantee co-ordinator in the reporting period.

There was no progress on **social dialogue.** The labour assembly and tripartite advisory board convened. However, Türkiye still does not have a functioning economic and social council. The unionisation rate decreased to 13.8% for workers in the private and public sectors, and the unionisation rate for private sector workers remained very low, at 6.83%. The unionisation rate of civil servants increased to 77.96%. The proportion of women among unionised workers remained low. Türkiye has not introduced effective and dissuasive measures against anti-union discrimination, including anti-union dismissals. The coverage of collective bargaining for workers in the public and private sector remained low. Measures are needed to ensure that more workers' organisations can engage in collective bargaining and to increase the coverage. Only 60 trade unions out of 246 at national level are considered representative, passing the legislative threshold of 1% of workers registered in a certain branch on national level required for collective bargaining. Barriers to collective bargaining in the private sector remain including long legal appeal procedures suspending bargaining certification of trade unions.

On **employment policy**, the decrease in the number of job and vocational counsellors in the Turkish Employment Agency (İŞKUR) continued in 2025. The increase in the number of active labour market programmes continued, including the number of participants. In 2026, Türkiye announced the youth employment initiative (GUC), aiming at bringing 3 million young people into the labour market. Despite the decrease in the rate of unregistered employment (15+) to 25.6% in 2025, informality continues to undermine the effectiveness of the social security system. Given the large working age population among Syrian migrants, the number of issued work permits remains low, despite an increase in 2025. Most of the Syrian refugees under temporary protection work in the informal sector.

The unemployment rate has declined, but both employment and labour force participation rates have decreased. The rate of composite measure of labour underutilisation consisting of time-related underemployment, potential labour force and unemployment observed a significant increase to 29.7% in 2025, which underlines that the absorption capacity of the labour market is limited.

Regarding labour force participation and unemployment rate, see the Statistical Annex and the Section on the functioning of the labour market under 2.3 Economic criteria.

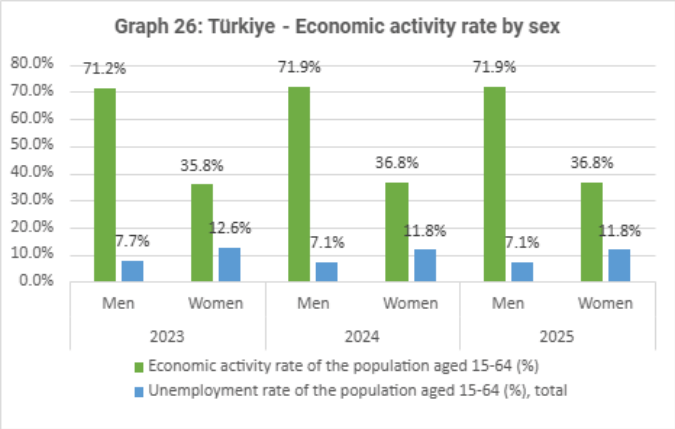
On **social protection and inclusion**, Türkiye continues to rely on fragmented programmes on poverty reduction. While several social assistance schemes exist, their outreach and adequacy are insufficient, particularly for informal workers, Roma and rural populations. In 2025, cash transfer programmes helped 262 229 children remain with their families, but

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coverage and adequacy remain limited due to high inflation and weak targeting. Nearly 1 in 3 children live in poverty, with 36.8% at risk of poverty or social exclusion. The GINI coefficient dropped but remains high. These challenges underscore the urgent need for more effective social protection measures. EU-funded social assistance schemes continue to cover a majority of vulnerable refugee households. Coordination between employment and social services is weak, and community-based care for older persons and people with disabilities is underdeveloped. Progress in de-institutionalisation for children in need of protection is notable as a new emergency foster care system has been expanded to 28 provinces. Gaps persist in mental health and disability services.

There was no progress on **non-discrimination in employment and social policies.** The existing laws still do not offer protection against discrimination on the grounds of sexual orientation and gender identity. There are still discriminatory practices against persons with disabilities and Roma population affecting access to employment. The public employment agency (İŞKUR) has developed a barrier-free web platform, a centralised tool providing persons with disabilities and employers with streamlined access to employment services. Due to the legal quota system, the number of persons with disabilities employed as civil servants in Türkiye reached 82 626 in 2025.

On **equality between women and men on employment and social policy**, gender disparities continue, compounded by intersecting inequalities. The gender gap in the labour market persists at nearly four times the EU average. With the female labour force participation rate decreasing to 36.2% in 2025, Türkiye continues to rank among the lowest in the OECD. In the Global Gender Gap Index 2025, Türkiye's ranking fell to 135th from 127th in 2024 in the overall index. The NEET rate for young women is still very high and increased in 2025. For women, the quality of employment also remains precarious, with a high informal employment rate. Informality still disproportionately affects women in agriculture, where the rate rose to 91.9%. A new law extended working mothers' maternity leave from 16 to 24 weeks and increased paternity leave in the private sector from 5 to 10 days. Only 2 751 people were provided with the half-time work benefit in 2025. Care burdens and gender bias continue to constrain women's employment. The enrolment rate for children aged 3-5 decreased to 48.97%, which negatively affects the employment rate of women. The gender gap in employment deepens disparities in pensions and poverty, leaving women disproportionately disadvantaged. Across all age groups, women continued to face a significantly higher risk of poverty or social exclusion than men. Regarding violence and harassment at work, new legislative measures, enforcement of existing measures and awareness-raising are still needed to prevent and eliminate all forms of workplace violence and harassment, in line with the Convention 190 of the International Labour Organisation. The share of female board members in the 50 largest companies listed on Borsa İstanbul (BIST 50) decreased to 18.3%, and the share of women in decision-making positions remained very low (*see Chapter 23 – Judiciary and fundamental rights*).



The good level of preparation for the participation in the **European Social Fund** (ESF) was maintained. Support is provided through the Instrument for Pre-accession Assistance (IPA III) for actions that pursue objectives corresponding to those of the ESF (i.e. employment, social inclusion, education, skills and administrative capacity building) *(see Chapter 22 – Regional policy and coordination of structural instruments).*

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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 and competitiveness**, limited progress was made. In September 2025, the Ministry of Environment, Urbanisation and Climate Change adopted a National Circular Economy Strategy 2025-2028. The strategy aims to increase the share of circular products on the market and integrate circular economy principles into industrial production processes. The strategy is aligned with EU industrial policy priorities and includes actions to harmonise the related EU *acquis* for the industrial sectors considered as priority. No interim evaluation report was published for the 2030 Industry and Technology Strategy and the biannual monitoring report was not foreseen in the Strategy. Türkiye kept the scope of the 15% domestic price advantage in public procurement. Its use has even further increased in terms of financial volume and number of procurement exercises (*see Chapter 5 – Public procurement*). Outcomes of the action plan for the fight against the informal economy (2023-2025) remain unpublished, and there is no new action plan for 2026 onwards.

On **enterprise policy and instruments**, Turkish legislation is still not fully harmonised with the Late Payment Directive. The Project-Based Investment Programme for large-scale investments was maintained. Türkiye continued implementing its new incentive scheme framework adopted in 2025. The Ministry of Industry and Technology's investment incentives bulletin reports that the greatest share of incentives was granted for the manufacturing sector by energy, services, mining and agriculture, during the reporting period. There is no public information available on these projects, nor on their implementation status. Türkiye also continued to implement support schemes for SMEs. 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. Although Türkiye has stronger performance than average as compared to the Western Balkans, it received consistently low scores in dimensions such as public procurement, bankruptcy and second chance, institutional and regulatory framework and access to finance for SMEs. 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 of 26 support schemes, compared with 20 schemes last year, including those of KOSGEB and the Turkish Scientific and Technological Research Institution (TÜBITAK).

Türkiye participates in the SME pillar of the Single Market Programme. Country data compiled confirms that Türkiye has been successful in submitting proposals and receiving grants under the SME pillar. 15 SME pillar project proposals involving Turkish organisations have been accepted in response to different calls (excluding Erasmus for Young Entrepreneurs).

On **sectoral policies,** Türkiye adopted an Artificial Intelligence Action Plan in August 2026, which will lay down sectoral roadmaps for AI and digital transformation of SMEs.

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.

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The third EU-Türkiye High-Level Dialogue on Science, Technology and Innovation took place in November 2025. It underscored the role of innovation in driving economic development and of technologies in supporting the green industrial transformation.

In the area of **research and innovation**, Türkiye continued implementing its 2030 Industry and Technology Strategy.

Türkiye continued its positive performance trend in Horizon Europe. Since September 2025, Türkiye has joined 806 projects, securing EUR 406 million in net EU contributions. EUR 67 million of this funding has been awarded since September 2025 through 165 grants. On the other hand, Türkiye's participation in the innovation pillar of the programme remains weak. Türkiye does not participate in the European Innovation Council (EIC) Accelerator. Despite this, seven Turkish entities received support under the EIC Pre-Accelerator, which aims to help SMEs and start-ups successfully apply for EIC Accelerator funding.

The share of research and development (R&D) expenditure in GDP resumed its upward trend, reaching 1.46% in 2024. However, the gap with the EU average of 2.24% remains significant. The total number of full-time equivalent R&D personnel increased by 7%, reaching 310 473 in 2024. Women accounted for approximately one third (34.3%) of researchers in 2024, reaching the EU average.

Türkiye continued progressing on its Smart Specialisation Strategies. In May 2026, the preliminary Smart Specialisation Strategies were completed in the three pilot regions of Kirikkale, Van and Antalya.

According to the European Innovation Scoreboard 2026, Türkiye is classified as an emerging innovator, performing at 57% of the EU average. The innovation gap between Türkiye and the EU continued to narrow.

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, which is below the EU average of 4.6%. 33.5% of the public education budget is allocated to higher education. The share of public education expenditure in the central government budget slightly increased to 14.8% in 2025, partially due to post-earthquake school reconstruction spending. Private expenditure accounts for 20.3% of total education spending, which may contribute to the reproduction and deepening of inequalities.

'Türkiye Century Maarif Model', a skills-based curricula introduced in 2024, has been gradually rolled out and introduced to grades 2, 6 and 9. The new curricula's strong emphasis on national, moral and cultural values outweighs scientific and evidence-based learning. Türkiye progressively includes green and digital skills in the education policy agenda including through curriculum reforms, and the adoption of the AI policy document and action plan for 2025-2029.

Enrolment rates in early childhood education in Türkiye remain below OECD averages and have shown a further decline. The net enrolment rate for five-year-olds remains relatively high but declined to 82.5%. Overall participation among children aged 3-5 decreased to 49% in the 2024-2025 school year. 18.8% of pre-school children are attending private pre-schools and creches – the highest rate across all education levels. Despite extending compulsory education to 12 years in 2012, Türkiye still faces significant non-participation especially at the upper secondary level.

The net enrolment among Turkish children during the 2024-2025 school year remained broadly stable for primary school, but decreased to 89.09% for lower secondary school, and

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declined further for upper secondary school, dropping to 82.85%. Around 804 250 school-aged children were not enrolled in formal education in the 2024-2025 academic year, including 611 612 Turkish nationals and 192 638 foreign nationals.

Concerning **international assessments for school education**, Türkiye recently took part in TALIS 2024, PISA 2025 and PIRLS 2026, and has confirmed its participation in TIMSS 2027. The PISA 2025 results were published on 8 September 2026. In Türkiye, 81% of students attained at least basic proficiency (Level 2 or higher) in science, 64% in mathematics and 76% in reading. Türkiye was one of the few participating countries whose results have improved in all three dimensions compared to PISA 2022. Results are higher than the OECD average in science and reading and very close to it in mathematics.

Vocational education and training (VET) and religious education schools account for around 40.6% of upper secondary enrolment in Türkiye, with persistent gender imbalances. School non-attendance (exceeding 20 days per school year) is as high as 40% in VET schools. The transition to higher education remains moderate, while skills mismatches affect a significant share of VET graduates. Employment outcomes are stronger than for general secondary graduates but below higher education, with better results for apprenticeship pathways. Work-based learning has expanded significantly, but concerns remain regarding quality, supervision, drop-out rates and working conditions, particularly in SMEs. Türkiye has been a member of the European Alliance for Apprenticeships (EAfA) since 2015, demonstrating its commitment to improving youth and adult employment. The country shows 26 pledges from local organisations and has increasingly promoted public-private partnerships to help strengthen apprenticeships and accelerate learners' transition into employment.

Considering **adult learning**, Türkiye's participation rate is higher than other candidate countries and potential candidates, but still below the EU target of 60% set for 2030. 7.5% of adults aged 25 to 64 participated in training in 2025.

Several incidents of school-related violence and killings in Türkiye have raised concerns regarding school safety, youth violence and potential gaps in prevention mechanisms.

Net enrolment in **higher education among persons aged 18–22** was 46.34% in 2025, including 53.02% among females. External evaluation and accreditation processes in Türkiye have expanded significantly, with 182 universities under follow-up monitoring, while 103 universities have received institutional accreditation. However, structural issues remain, particularly regarding institutional autonomy, governance, and academic freedom, which continued to deteriorate with growing administrative and political interference. The 2025 Scholars at Risk report indicates that the space for academic freedom in Türkiye is extremely limited. In the reporting period, students and academics faced disciplinary actions, investigations, suspensions and police intervened in relation to protests, public statements or on-campus activities. Centralised rector appointments continued. In May 2026, the operating licence of Istanbul Bilgi University was revoked by a Presidential decree, effectively ordering its closure. Even though this decision was reversed several days later, it raised serious concerns about the predictability of administrative decision-making and the institutional autonomy of universities.

On equal access and inclusion, as of January 2026, 803 877 refugee children were enrolled in formal education, corresponding to an overall gross enrolment rate of 78%. Türkiye supports children with special needs through measures such as compulsory pre-school and free transport, with 602 729 students enrolled in special education. Despite record levels of school enrolment, the segregation continues to be significant (24% of them). Barriers to access and retention persist, particularly for girls and refugee children with disabilities, due to accessibility constraints, socio-economic factors and stigma. Further efforts are needed to retain Roma children in the schooling system.

The Ministry of National Education has been increasingly enabling the influence of religious groups and sect-affiliated structures within the education system. This trend risks

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undermining the provision of secular and quality education, while also weakening oversight and accountability mechanisms.

Türkiye remains one of the largest beneficiaries of the **Erasmus+** programme, mainly under mobility actions in higher education, VET and youth. The authorities support the programme through nationwide promotion, capacity building and inclusion measures. Five Turkish universities participate in European University Alliances, mainly as partners. Türkiye also takes part in European Education Area working groups at expert level.

In the field of **youth** policy, Türkiye has not renewed its national youth policy originally adopted in 2011. In general, the space for independent, democratic participatory mechanisms for youth is shrinking. The Youth Organisations Forum (GoFor), a rights-based umbrella organisation of youth organisations in Türkiye, became a full member of the European Youth Forum in 2026, but remains unrecognised by the government. While there has been an increase in the number of youth centres, offices, camps and mobility programmes, inclusive and rights-based youth services remain limited. Independent youth organisations also frequently encounter financial and administrative barriers. Further, youth participating in peaceful assemblies, protests and collective actions also face arbitrary detention and judicial proceedings. The Turkish Youth Delegate to the Congress of Local and Regional Authorities of the Council of Europe, who was arrested and placed in detention in September 2025 based on the statements he gave during the Congress, was later released and acquitted of all charges in February 2026.

Türkiye does not yet have a comprehensive, standalone national **sport** strategy, with policy development remaining fragmented across different frameworks. The country continues to participate actively in the European Week of Sport and related initiatives.

In the area of **culture**, despite the increased number of cultural activities and festivals at central and local level, as well as investments in cultural infrastructure, structural challenges persist, notably on support for cultural diversity and institutional coordination. The broader environment continues to affect cultural pluralism, with limited space available for independent stakeholders and critical expressions.

The level of public expenditure on culture is still relatively limited. The Ministry of Culture and Tourism continued to promote large-scale cultural events. However, challenges remain as regards ensuring transparent stakeholder participation. Political interventions and arbitrary bans of cultural events continued in the reporting period.

Implementation of the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions continued at a gradual pace, without new substantial policy measures.

Türkiye does not participate in the 2021-2027 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 progress on **customs legislation**. Turkish customs law is not harmonised with the Union Customs Code. Furthermore, regulations concerning free zones and the duty relief regime are still not fully aligned with the EU *acquis*.

Türkiye maintained a large scope of additional duties on many products originating in non-EU countries, which are in free circulation in the EU-Turkey Customs Union. Türkiye's application of import surveillance is in contradiction with the principles of transparent, objective, and verifiable customs valuation procedures. Furthermore, the absence of a legal mechanism allowing the recovery of overpaid duties resulting from the application of import

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surveillance is not in line with the EU *acquis*. Export tax measures on hides, skins and wet-blue leather remain in force.

An agreement between the EU and Türkiye on mutual recognition of respective Authorised Economic Operators (AEO) programmes has been adopted on 16 July 2026 and will enter into force once all administrative and technical procedure for its implementation are completed.

In line with the provisions 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 the correct application of customs legislation, 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 continues its efforts to combat 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 not yet completed. The 2024 statistics, based on the detentions of IPR infringing goods made by EU Member States customs authorities at the border, show that Türkiye remains an important country of origin for these goods with 5,736 cases (8.7%) having Türkiye as country of provenance. 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 in phase 5 as part of its membership in the Convention on a Common Transit Procedure and needs to update it to phase 6. Türkiye's Tariff IT systems are not in line with the EU tariff IT systems. The customs IT strategy should be updated in line with business initiatives and customs business processes based on the legal framework.

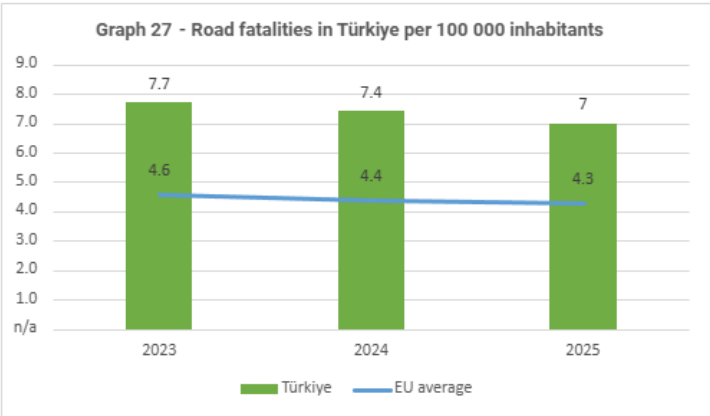
CLUSTER 4: THE GREEN AGENDA AND SUSTAINABLE CONNECTIVITY

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.

In **general transport**, the Union of Municipalities of Türkiye adopted a White Paper on Sustainable Urban Mobility in December 2025. Adoption by national authorities is pending.



On **road transport**, Türkiye is developing a public monitoring website and a Traffic Safety Analysis Platform to consolidate road safety for road infrastructure, traffic, climatic and accident data and support data-based decision-making. According to the Turkish Statistics Institute, in 2025 compared with 2024, the total number of road crashes increased by 7.3%, the number of crashes with death or injury increased by

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8%, the number of crashes with material damage increased by 7.1%, and the number of injured increased by 4.9%." Deaths fell by 5%, while the vehicle fleet grew 7.4%.

On **rail transport**, Türkiye published the 2027 Networks Statement in December 2025, established a capacity management department under the incumbent rail operator (TCDD) and introduced digital systems for capacity requests, access contracts, charging calculations and traffic operations, reinforcing its market organisation and capacity management. Türkiye has not yet adopted a new railway framework law nor 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, is not yet achieved. The subsidies to the incumbent railway operator and the financial independence of the transport operator from infrastructure manager remain major issues, and the transitional period allowing subsidies to TCDD and TCDD Taşımacılık has been extended until 2033. 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**, technical cooperation with the European Maritime Safety Agency continued. National legislation implementing the EU Port Services Regulation is not yet developed.

Türkiye continues to prohibit the docking of vessels flying the flag of the Republic of Cyprus, vessels of other nationalities linked to Cyprus through ownership, vessels whose last port of call was Cyprus, and vessels carrying cargo to or from Cyprus from calling at Turkish ports. This restriction remains incompatible with full implementation of the EU maritime *acquis*.

On **inland waterways**, alignment remains limited as Türkiye has limited inland waterway transport.

On **aviation**, the Turkish Sustainable Aviation Fuel Instruction (SHT-SAF) entered into force on 1 January 2026, setting standards, certification and reporting obligations. The Instruction makes SAF-use mandatory for CORSIA flights departing from Türkiye and adopts an approach based on emission reductions per litre rather than a fixed blending mandate. The Instruction also incorporates ICAO's 5% emission reduction target from SAF-use by 2030. Türkiye needs to develop incentive mechanisms to accelerate its implementation and complete its alignment with the EU ReFuelEU Aviation Regulation.

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 and intermodal transport**, no new EU-aligned combined transport framework was adopted. The *acquis* gap remains on combined transport, multimodal facilitation and green corridor incentives.

As regards alignment with EU passenger rights regulations, Türkiye introduced compensation for delays of three hours or more in its legislation. Beyond this, no further steps have been reported at this stage.

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.

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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**, no developments were reported on legislative alignment with the EU *acquis* in this area. Overall, despite diversification efforts, Türkiye's dependence on Russian energy remained significant. The Middle East crisis did not lead to reported oil or gas supply disruptions in Türkiye but underlined the country's exposure as a net energy importer to regional transit-route risks, shipping disruptions and energy price volatility. In 2025, Türkiye retained the second largest LNG re-gasification capacity in Europe, after Spain, at 51.3 bcm. Türkiye improved upstream operations at the Sakarya gas field in the Black Sea, with production reaching around 9-10 mcm/day in 2025 and expected to reach up to 20 mcm/day by 2026, once the second floating production platform becomes operational. The second phase of construction works at the country's biggest underground storage facility at Tuz Golu (Salt Lake) continued with a target of 5.4 bcm of gas storage capacity. The second underground gas storage facility at Silivri was expanded, reaching 4.6 bcm of gas storage capacity.

On the **internal energy market**, the natural gas market law remains incompatible with the EU's third energy package and the pricing is not yet fully transparent, cost-reflective and non-discriminatory. In April 2026, household electricity and natural gas tariffs were increased by up to 25%, and the consumption-based tiered tariff system introduced for electricity in 2025 was extended to natural gas, limiting subsidised prices to households consuming below city-specific reference levels. While this represents a step towards better-targeted support, energy prices remain largely regulated and subsidised. In order to align with the EU *acquis*, Türkiye needs to unbundle the state-owned gas company BOTAŞ, which continues to dominate the country's natural gas market and trade. In view of this, Türkiye still needs to adopt a legally binding plan and timetable for unbundling activities.

On the **wholesale electricity market**, Türkiye maintained its position as a net electricity exporter, notwithstanding that electricity demand increased by 2.1% to reach a record of around 361 TWh. Demand growth moderated after the post-earthquake recovery in 2024, but summer cooling needs continued to contribute to peak electricity demand amid persistently high temperatures.

The share of fossil fuels in electricity generation stood at around 56-57%, slightly above the 2024 historic low of 55% but still relatively low by recent standards. Gas generation accounted for 23%. Hydropower accounted for around 16% of generation, while drought-related weakness in hydro output continued to increase the role of gas-fired generation. Wind and solar together generated just over one fifth of Türkiye's electricity, reaching around 22% of the power mix and exceeding domestic coal generation for the third consecutive year.

On **hydrocarbons**, Türkiye has not yet aligned its legislation with the Directive on the safety of offshore oil and gas operations, and rules concerning the transit of hydrocarbons.

On **coal**, Türkiye continued to provide incentives for domestic lignite production, while electricity generation from imported coal remained significant at around 21% of total generation. When considering all coal-fired generation together (i.e. domestic lignite and imported coal combined), coal accounted for around one third of total electricity generation in 2025. In relative terms, its share declined from around 36% in 2024 to around 34% in 2025 due to higher total electricity generation and a slight decline in coal-fired output. However, Türkiye has not yet set a specific coal phase-out date. Türkiye should reduce its envisaged coal-fired power generation capacity for the next decade.

On **renewable energy**, the share of renewable sources in installed power continues to increase, from 60.1% in 2024 to 62.3% at the end of 2025 and 62.7% by mid-2026.

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Renewables supplied 43% of electricity generated in 2025. In 2025, hydropower generated around 57 TWh, wind 40 TWh and solar 38 TWh; geothermal and bioenergy supplied most of the remaining renewable electricity. The trend has reversed so far in 2026: hydropower generated 57 TWh in the first half of the year, compared with 33.9 TWh in the same period of 2025. This points to a higher renewable share of electricity production for 2026. Battery storage deployment remains limited compared with a pipeline of around 33 GW of pre-licensed storage-integrated projects. By early 2026, around 208 MW of storage-integrated wind and solar capacity was in operation. Türkiye's storage targets are 2.1 GW by 2030 and 7.5 GW by 2035.

In 2025, Türkiye awarded Renewable Energy Auctions (YEKA) including approximately 1.2 GW of wind and 800 MW of solar photovoltaic capacity under the 2024 YEKA rounds. Additional YEKA tenders were held later in 2025, including 650 MW of solar capacity and 1.15 GW of wind capacity, bringing total awarded wind and solar capacity in the year to close to 3.8 GW. However, Türkiye's local content requirement practices continue to raise concerns as they contradict WTO and EU-Turkey Customs Union rules and undermine the competitiveness of EU and other international companies on the Turkish energy market.

As regards **energy efficiency,** Türkiye further strengthened its regulatory framework for buildings through the introduction of stricter energy performance requirements and green building standards**.**

On **nuclear energy, nuclear safety, radioactive waste and spent fuel management and radiation protection,** the first reactor of Türkiye's first nuclear power plant (NPP) at Akkuyu on the Mediterranean Sea (a 99.2% investment by Russia's Rosatom) is expected to be operational by the end of 2026. The construction of the second, third and fourth reactors at Akkuyu NPP continued. Türkiye partially incorporated the findings from the European Nuclear Safety Regulators Group (ENSREG) nuclear safety assessment peer review in the ongoing review of the operating licence application and other assessment activities. Türkiye committed to integrate the recommended safety improvements into a national action plan. It should be issued before the first unit starts. Türkiye is not yet member of the European Community Urgent Radiological Information Exchange (ECURIE) 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 Halkalı–Kapıkule railway line, which remains Türkiye's flagship TEN-T-related railway investment and a key EU-Türkiye connectivity project. Construction proceeded across the Kapıkule–Çerkezköy, Çerkezköy–Ispartakule and Ispartakule–Halkalı sections. Testing and commissioning in the Çerkezköy–Kapıkule section started and commercial operations are expected to start in October 2026.

Türkiye advanced preparatory work for the complementary Istanbul North Rail Crossing, which will provide a new high-capacity rail crossing over the Bosphorus via the Yavuz Sultan Selim Bridge. Türkiye has not yet proceeded with the procurement. Completing this link would strengthen multimodal corridors. Increasing rail capacity in the Marmaray tunnel, the only undersea rail connection across the Bosphorus, is increasingly urgent. Marmaray currently experiences capacity constraints due to mixed passenger and freight use.

The Mersin–Adana–Osmaniye–Gaziantep railway corridor, with a total length of approximately 312.5 km, reached around 85% physical progress. This corridor will strengthen southern and south-eastern rail connectivity, improve access to ports and

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logistics centres, and support industrial freight movements. Construction progress in the Ankara–Izmir high-speed railway line continued.

However, Türkiye is not complementing progress in infrastructure with stronger alignment with the revised TEN-T framework, including network planning, governance, interoperability, urban nodes, multimodal terminals and rail freight performance. Further steps are necessary on rail market opening, transparent capacity allocation, infrastructure charging, safety, interoperability and non-discriminatory access to infrastructure.

Concerning **energy networks**, Türkiye continued to play an important role for regional electricity connectivity but it is not yet fully aligned with the revised TEN-E Regulation. The integration of increased amounts of intermittent renewable energy continued to represent a major challenge in 2026, with growing concerns related to grid congestion and the network's limited capacity to absorb planned renewable investments. TEİAŞ's observer status at ENTSO-E was not renewed in June 2026. Türkiye continued to impede survey activities for the Great Sea Interconnector, an EU Project of Common Interest (PCI) under the TEN-E Regulation.

Chapter 27: Environment and climate change

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

Environment

On **horizontal legislation**, no development was reported. Further regulatory work remains necessary to fully align with the environmental impact assessment (EIA) and strategic environmental assessment (SEA) Directives, in particular with regard to the Espoo Convention and its SEA Protocol, as well as with Environmental Liability Directive and the Environmental Crime Directive. Türkiye is not yet part of the Aarhus Convention and difficulties persist in accessing public information, justice in environmental matters, and public participation in decision-making.

On **air quality**, no progress was reported. Severe air pollution in some cities continues to raise concerns. Regarding air quality monitoring, PM 2.5 is now measured at 189 of 383 monitoring stations and should reduce the threshold values for most parameters as they remain higher than the EU limit values. No new national legislation was adopted to align with the revised EU directives on ambient air quality and national emission ceiling legislation.

On **waste management**, Türkiye's recycling rate increased from 36% to 38% in 2025 and the implementation of the deposit management system advanced from 1 to 18 provinces in the reporting period, nationwide roll-out has started in July 2026. The level of implementation of waste management plans at local and regional level remains insufficient. Türkiye still needs to adopt legislation on ship recycling to mirror the requirements of the EU ship recycling regulation. Concerns over non-compliance with environmental standards and fatal accidents in ship recycling facilities continues to increase. In October 2025, Türkiye adopted its national circular economy strategy and action plan together with the single-use plastics roadmap. The management of construction debris remains a major environmental challenge.

On **water quality,** Türkiye completed the adoption of all flood risk, drought and groundwater management plans that were pending and 12 out of 25 river basin management plans are adopted and under implementation. However, no progress was made on aligning with the revised EU Directive on drinking water, and the coverage of wastewater treatment plants remains at 91% of the municipal population. Alignment with the EU Marine Strategy Directive as well as the marine spatial planning directive is still pending.

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On **nature protection,** Türkiye joined the International Convention for the Regulation of Whaling on 30 December 2025. Türkiye ratified the agreement on the conservation and sustainable use of marine biological diversity of areas beyond national jurisdiction under the United Nations Convention of the Law of the Sea (BBNJ Agreement) (*see Chapter 13 – Fisheries*). In February 2026, Türkiye also adopted an implementing regulation on the prevention and dispersion of invasive alien species. Planning and construction in wetlands, forests and natural sites are still not in line with the EU *acquis*. The mining regulation, allowing mining in agricultural and protected areas, national parks and coastal areas, remains a concern among NGOs and the public. Türkiye has not yet set national targets to implement the Kunming-Montreal Global Biodiversity Framework.

On **industrial pollution and risk management**, Türkiye adopted a regulation on the management of industrial emissions, which entered into force on 1 December 2025, but alignment with the EU Industrial emissions directive remains partial and further work is required, especially concerning the permit system.

On **chemicals**, alignment is not yet achieved with the EU Regulation on the registration, evaluation, authorisation and restriction of chemicals (REACH). Although transposition of the Biocidal Products Regulation is well advanced, certain elements remain to be approximated to achieve full alignment.

No improvements were made on **noise pollution** but the level of alignment and implementation is already high.

On **civil protection**, Türkiye continued its participation in the relevant activities under the Union Civil Protection Mechanism (UCPM), including disaster prevention and preparedness capacity building. However, the country has not reported to the Commission on its disaster risk management for the 2023 period. Türkiye also contributed to the European Civil Protection Pool (ECPP) and rescEU reserve with its capacities for response to earthquakes and medical emergencies. It deployed Aerial Firefighting Assets during the 2026 wildfire season to France and Spain and an Urban Search and Rescue team in response to the earthquake in Venezuela. Additionally, Türkiye conducted Medevac operations of patients from Gaza under the UCPM. The establishment of a Secure Trans-European Services for Telematics between administrations, which is not yet in place, remains a precondition for connecting to the Common Emergency Communication and Information System (CECIS).

Climate change

Türkiye made some progress over the reporting period to align with the EU climate *acquis*.

Building on the Climate Law adopted in July 2025, Türkiye published in August 2026 the related implementing legislation, notably on Local Climate Change Action Plans and Climate Change Coordination Boards and the national Emission Trading System (ETS). However, the establishment of this ETS, initially scheduled in 2026, is still pending; in addition, full harmonisation with the EU ETS Directive requires further work and is a major avenue for bilateral cooperation.

In November 2025 Türkiye submitted its second Nationally Determined Contribution (NDC) under the Paris Agreement to the United Nations Framework Convention on Climate Change (UNFCCC), with an emission reduction target for the year 2035 set at 643 million tonnes CO_2eq. While this new NDC for 2035 suggests a reduction of emissions compared to the target established for 2030, it suggests a substantial increase in greenhouse gas emissions (by almost 25%) compared to 2024. Türkiye's medium-term level of ambition therefore remains insufficient and misaligned with that of the EU, even more so as the country is actively preparing to host and preside over the upcoming UNFCCC Conference of the Parties (COP31), which will be held in Antalya in November 2026.

The Regulation implementing the Kigali Amendment to the Montreal Protocol on substances that deplete the ozone layer (adopted in October 2024, fully in force as of 1 January 2025)

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brings Turkish standard closer to the EU Regulation on fluorinated greenhouse gasses, but more efforts are needed for full alignment.

Türkiye still does not fully implement the Fuel Quality Directive. Türkiye is also not aligned with EU emissions standards for new light and heavy-duty vehicles nor with the EU carbon capture and storage directive.

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**, there were no developments as regards the establishment of the integrated administration and control system (IACS). Implementation of the agricultural census is ongoing (*see Chapter 18 – Statistics*).

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 non-transparent.

On **rural development**, implementation of the IPA rural development programme (IPARD III) is advancing steadily, with twelve calls for applications launched and with a continuous high number of applications submitted exceeding the available budget. Türkiye is the first country that was granted the entrustment to implement the measure on 'Rural Public Infrastructure', with the entrustment procedure ongoing for another measure (Advisory Services).

On **quality policy**, alignment with the EU *acquis* needs to continue. On **organic farming**, there were no developments in aligning with the EU *acquis*.

On the **fight against corruption measures**, the national authorities 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 plant safety, quality of seeds, plant reproductive material, 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 still remains high.

On **veterinary policy,** animal health legislation in Türkiye is not yet aligned with the EU's animal health policy and *acquis*. Lack of enforcement continued on animal welfare, where rules on slaughterhouses, long journeys and the transition to enriched cage systems are still not aligned and implemented.

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On the **placing of food, feed and animal by-products on the market**, problems on raw milk quality continue as the draft raw milk action plan 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 are not yet adopted. 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 significant progress was reported. Türkiye adopted a communiqué laying down the criteria on sampling and analysis methods for official controls of perfluoroalkyl substances in certain foodstuffs.

On **phytosanitary policy,** Türkiye adopted a regulation concerning the wholesale and retail sales and storage of Plant Protection Products (PPPs) and a Regulation on the application and inspection of PPPs. No progress on plant health law was reported. Regarding the marketing of seed and other plant reproductive material, Türkiye should fully align its national legislation with the EU *acquis* on the rules on plant reproductive material (PRM) and forest reproductive material (FRM). Türkiye should work on establishing the necessary institutional frameworks, governance structures, and technical capacities to implement and enforce the *acquis* effectively, and set up functioning certification systems for PRM and FRM, including regarding the evaluation and registration of varieties for PRM, the approval and registration of basic material for FRM, official inspection and controls, testing and laboratory infrastructures, and the registration and supervision of operators.

Türkiye has not yet aligned its legislation on novel food and on **genetically modified organisms**.

Chapter 13: Fisheries

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**. The Fisheries Sector Policy Document (2025-2029) has been adopted. The scope of production planning has been expanded from 11 to 16 species, including a wider range of fisheries and aquaculture species. 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 implementing the monitoring, control and surveillance measures adopted by the International Commission for the Conservation of Atlantic Tunas and the GFCM. The fisheries control capacity was further strengthened with the establishment of the new fisheries monitoring centre. Within the context of international inspection schemes of regional fisheries management organisations, the collaboration with the European Fisheries Control Agency in onboard inspection campaigns further contributed to fisheries control capacity building.

On **structural action**, there were no significant developments in aligning with the EU *acquis*. Structural measures continued to support small-scale fisheries and women in fisheries.

On **market policy**, there has been no major progress. Türkiye continued providing **State aid** for aquaculture.

The GFCM decisions regarding **aquaculture** are integrated in the sectoral governance. The Regulation on the prevention and management of the introduction and spread of invasive alien species was published.

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On **international agreements**, Türkiye kept cooperating with the EU in regional and international platforms. Türkiye became an observer in the Indian Ocean Tuna Commission. Türkiye has also signed and ratified the Agreement on the conservation and sustainable use of marine biological diversity of areas beyond national jurisdiction (BBNJ Agreement). However, concerns exist regarding the BBNJ Agreement's requirement that it will be interpreted and applied in the context of, and in a manner consistent with, the United Nations Convention on the Law of the Sea (UNCLOS). Furthermore, Türkiye is not a Party to UNCLOS, while accession to the Convention 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 operates through a ''shared management' model between the Commission and EU Member States. This system applies an effective multi-level governance and partnership approach that is open to all regions, long-term, and strongly place-based. The implementation of cohesion policy programmes therefore 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.

Türkiye would benefit from further strengthening its **legislative and policy framework** for regional development by making greater use of evidence-based policymaking and systematic use of evaluations and impact assessments. Advancing reforms in public administration and public finance management would strengthen accountability, improve policy coordination and support effective multi-level governance. Further efforts are needed to strengthen the role and capacities of local authorities and ensure that local governance arrangements enable effective participation in decision-making and implementation of regional development policies.

The **institutional framework** for managing IPA III funding has strengthened, with improved supervision and intervention capacity by the National Authorising Officer, particularly in contracting and implementation. However, the capacity of the National IPA Coordinator (NIPAC) requires strengthening to ensure effective cross-ministerial coordination, strategic prioritisation of interventions, and rigorous results monitoring. While the institutional set-up for indirect management by the beneficiary country (IMBC) now aligns with IPA III requirements, additional reinforcement is needed to address project-specific challenges, including resource efficiency controls and long-term sustainability of EU-funded actions.

Ongoing efforts to enhance **administrative capacities** in programming, monitoring, and evaluation, as well as to strengthen the Audit Authority, have not yet resolved key deficiencies. A clear staff retention strategy remains absent within IPA structures, and recruitment procedures for senior civil service positions still lack objective selection criteria. The operational capacity of IMBC structures must be further developed to ensure timely and efficient contracting and implementation of IPA programmes. The project management capabilities require improvement to reinforce financial oversight and shift focus from compliance alone to performance-driven outcomes.

In **programming**, the NIPAC has maintained its coordinating role, overseeing implementation, monitoring and evaluation. While Türkiye has gained experience in regional policy programming and Interreg programmes, persistent structural weaknesses remain, particularly in local democratic governance and balanced regional development. To improve the effectiveness of EU support under IPA III, accelerated implementation remains a key priority.

On **monitoring and evaluation**, as part of the monitoring procedures applicable under IMBC, results-oriented monitoring missions continued. There was no substantial change regarding the improvement of the Management Information Systems to facilitate the tracking

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of project and programme progress through output and result. Even if the risks are partially addressed through outsourcing, the authorities should develop capacity for *ex post* controls. The monitoring, evaluation, and implementation tools for Türkiye's National Strategy for Regional Development and its Regional Development Agencies require strengthening, including more robust statistical frameworks.

IPA structures possess established **financial management and control systems**, though their implementation effectiveness requires further enhancement, particularly in the application of performance indicators and strict adherence to financial best practices. Audit procedures continue to comply with internationally recognised standards, as defined in the Financial Framework Partnership Agreement and associated framework agreements. However, additional strengthening is necessary to address long-term project sustainability issues and assessing the broader impact on the sound financial management of EU funds.

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

In the main policy areas pertaining to the functioning of the own resources system, Türkiye has already established the fundamental institutions and principles (*see Chapters 16 - Taxation, 18 - Statistics, 29 - Customs Union and 32 - Financial control).* For the own resources system to be administered effectively, Türkiye will eventually need to develop implementing regulations, strengthen management capacity and establish strong coordination mechanisms. 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. However, Türkiye has not yet adopted a draft customs law aligned with the Union Customs Code, which would further contribute to the preparation of **traditional own resources** (mainly customs duties).

There are currently no systems to accurately calculate the VAT base and the weighted average rate for the **VAT-based resource**. Concerns on VAT and customs duty fraud persist, as do concerns on the scale of the informal sector, despite the government's attempts to increase the tax base and voluntary tax compliance. Legislation on structure, exemptions, special schemes and the scope of reduced rates is not fully aligned with the EU *acquis.*

Regarding the **gross national income-based (GNI) resource**, Türkiye has undertaken attempts to fully align its national accounts and GNI calculations with the European System of Accounts (ESA 2010). Türkiye also needs to enhance the estimates' exhaustiveness to ensure that they take account of the non-observed economy. The GNI inventory is not fully aligned with 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 establish a fully functional coordination structure, with adequate administrative capacity and the implementing regulations needed to ensure that it can accurately calculate, forecast, account for, collect, pay, monitor and report own resources to the EU in line with the EU *acquis*.

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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 three new safeguard investigations. In addition. Türkiye initiated two reviews of existing safeguard investigations.

Coordination between the EU and Türkiye within the World Trade Organization (WTO), in the OECD and in the G20 needs to be improved. Türkiye has lifted its longstanding objection for legal incorporation of the Investment Facilitation for Development Agreement into the WTO rulebook. 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 2024 outcome nor is part of the group of members supporting its interim implementation. Türkiye continues to express scepticism about the meaning and scope of the commitment. Regarding the renewal of the moratorium on customs duties on electronic transmissions, Türkiye has systematically raised concerns about its scope but eventually signalled its readiness to accept the MC14 Chairman's compromise. Türkiye did not join the Multi-party Interim Appeal Arbitration Arrangement (MPIA). Türkiye has yet to align its legislation with the EU *acquis* on the screening of foreign direct investments (FDI).

A technical revision of the bridging legislation of the EU-Turkey Customs Union (Decision 1/2006 of the Customs Cooperation Committee) to align it with the new rules of the revised Pan-Euro-Mediterranean Convention is expected to be adopted soon. 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 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 85 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 is yet to be implemented. Türkiye continued to implement the free trade agreements that it concluded before the EU with Malaysia, Venezuela, the United Arab Emirates, and Qatar, thereby diverging from the common commercial policy under the EU-Turkey Customs Union. In addition, Türkiye continued to apply preferential trade agreements with Iran, Uzbekistan, Pakistan, and Azerbaijan.

As for **development policy** and **humanitarian aid**, Türkiye granted official development assistance in 2025 of EUR 6.37 billion (USD 7.52 billion), which is equivalent to 0.5% of its gross national income, down from EUR 6.87 billion (USD 7.48 billion) in 2024. It remains below the 0.7% target enshrined in Sustainable Development Goal 17. The assistance was largely directed towards humanitarian support for projects related to Syrian refugees 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 restrictive measures.

The **political dialogue** between the EU and Türkiye on foreign and security policy issues continued, both at high- and senior officials' level. A joint visit to Türkiye by HR/VP and Commissioners for Enlargement and Internal Affairs and Migration took place in June 2026, and the Presidents of the European Council and Commission and the HR/VP participated in the NATO Summit in Ankara in July 2026, where the Presidents met with President Erdogan. The EU and Türkiye held a new edition of the Political Dialogue at Political Directors' level in January 2026, informal consultations on security and defence took place twice (November 2025 and June 2026) and the counter-terrorism dialogue resumed in November 2025. Türkiye also actively engaged in consultations with the EU on a range of regional developments, and several EU Special Representatives visited Türkiye. In the reporting period, military advisors were mutually appointed to the EU Delegation in Ankara and the Turkish Permanent Delegation in the EU. In May 2026, the EU Special Envoy for the implementation of EU sanctions visited Türkiye and engaged on prevention of circumvention of sanctions against Russia. The Turkish Minister of Foreign Affairs participated in the Ministerial Meeting on Cross-Regional Security and Connectivity in Luxembourg (October 2025), where he also held a bilateral meeting with the HR/VP. The Turkish Vice-President participated in the video conference chaired by the Presidents of the European Council and Commission with the Leaders from Middle East countries on the war in Iran (March 2026), as well as attended the European Political Community summit in Yerevan (May 2026).

The institutional framework enabling Türkiye's participation in the **EU's common foreign and security policy (CFSP)** and **common security and defence policy (CSDP)** remains 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 1 September 2026 compared with 3% in 2025.

Türkiye maintained its position of not supporting sanctions adopted outside the UN framework and refrained from aligning with the EU's **restrictive measures** adopted as a response to Russia's war of aggression against Ukraine. However, Türkiye partially cooperated with the EU to avoid circumvention of sanctions via its territory. Since 2023, Türkiye banned the re-export of sanctioned goods transiting through its free trade zones/warehouses and has taken measures to prevent the re-export to Russia of EU origin Common High-Priority List (CHPL) items originating from the EU, the US, the UK and Japan. Türkiye's export to Russia of CHPL items of EU origin dropped significantly in 2025, with an 86% decrease compared to 2023 (prior to the introduction of the measures), but it remains higher than the pre-war volumes. Action remains insufficient and more efforts are needed regarding preventing the re-export to Russia of EU-origin Economically Critical Goods (ECG).

Türkiye is also expected to take concrete actions to address the 'false transit' of CHPL items to third countries, notably Central Asia, ultimately reaching Russia and on cases of 'falsification of origin' of Russian-origin sanctioned goods that are illegally entering the EU's single market. Further efforts are also expected on EU-sanctioned vessels still entering Turkish waters. In the energy sector, concerns persist over falsified certificates for refined petroleum products. Türkiye has also emerged as a major trading hub for oil products, providing substantial revenues to Russia.

Türkiye continued to operate flights to and from Russia. As of 1 September 2026, twenty-nine Türkiye-based entities were subject to tighter export restrictions, and five entities were

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subject to fully-fledged listings in the context of the EU's restrictive measures adopted following Russia's war of aggression against Ukraine.

Türkiye actively engaged with **international organisations**, including the UN, the Council of Europe and the OSCE, while systematically obstructing the participation of the Republic of Cyprus in several organisations and arrangements. Türkiye's alignment to the EU positions in international organisations, including the UN General Assembly, remained very low. Türkiye continued playing a pivotal role in the Organisation of Turkic States (OTS) and the Organisation for Islamic Cooperation, using them as a platform to promote efforts to legitimise the so-called, internationally not recognised, 'Turkish Republic of Northern Cyprus', thus undermining efforts to foster an environment conducive to the resumption of settlement talks under UN auspices. Türkiye is not a State Party to some major UN treaties, including the Rome Statute of the International Criminal Court and the UN Convention on the Law of the Sea (UNCLOS). Türkiye does not have a national action plan for the implementation of UN Security Council Resolution 1325 on the Women, Peace and Security 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. Türkiye is a signatory to the Arms Trade Treaty but has yet to ratify and it does not align with EU statements in the framework of the Treaty on the Non-Proliferation of nuclear weapons, and within the Chemical Weapons Convention/Organisation for the Prohibition of Chemical Weapons. On arms export control, Türkiye does not cooperate with the EU to achieve alignment with the EU Common Position 2008/944.

On **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 continued to seek involvement in CSDP and EU defence initiatives, showcasing its claim to play a significant role in strengthening the future European security, while simultaneously maintaining its policy of excluding one EU Member State from cooperation with NATO. 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. Informal EU-Türkiye CSDP consultations continued (November 2025 and June 2026). Türkiye hosted the NATO Summit in July 2026.

On counter-terrorism, Türkiye remains an active participant in the Global Coalition against Da'esh and has been cooperating with the EU and MS to improve the exchange of information and cross-border investigations in this context.

On hybrid threats, foreign information manipulation and interference (FIMI) activities targeting Türkiye persisted. Türkiye has not imposed restrictions on the operations of Russian state-controlled media outlets leaving its information environment vulnerable to coordinated disinformation and influence campaigns. Russia-linked actors spread pro-Kremlin narratives in traditional and social media amplifying disinformation 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

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the same time seeking to consolidate its stance as a facilitator and mediator as well as provider of humanitarian aid.

On Russia's war of aggression against Ukraine, Türkiye maintained its support for Ukraine. Türkiye has voted for UN resolutions condemning Russia's aggression and supporting Ukraine's sovereignty and territorial integrity (including on 24 February 2026). Türkiye also participates in the 'Coalition of the Willing' initiative. Ankara has played an active role in mediation efforts, including facilitating prisoners' exchanges and hosting direct Ukraine-Russia talks and has continued enforcing the Montreux Convention. Türkiye repeatedly called for a moratorium on strikes against its vessels in Black Sea and conveyed its concerns to both Ukraine and Russia.

At the same time, Türkiye continued to maintain close relations with Russia through high-level contacts, regular consultations and robust economic ties. High-level contacts took place through phone calls between the two Presidents, who met in December 2025 and September 2026, the Ministers of Foreign Affairs, who met in June 2026, meetings in the margins of international fora, and through parliamentary diplomacy. In April 2026, Türkiye and Russia signed a Consultation Action Plan for 2026-2027 with the objective to of cooperating constructively on ongoing crises as well as on trade and energy. Türkiye remains dependent on Russia's energy supplies, despite US secondary sanctions on Russian oil companies, and on nuclear energy cooperation.

Türkiye remained both an important and a challenging partner for the **United States**. After the two Presidents' meeting in September 2025, high-level contacts continued, including within the NATO framework. Ankara continues to seek enhancing bilateral cooperation in the defence industry. In July 2026, the US President met with the Turkish President (in the margins of the NATO Summit in Ankara) and announced the lifting of (CAATSA) sanctions and readiness to consider sales of F-35 to Türkiye, linked to the latter possibly selling the Russian S-400 surface-to-air defence system to a third country.

Türkiye has increased its engagement with the **Gulf states** in the wake of the US-Israel-Iran war, supported by a growing strategic alignment and driven by shared interests in regional and economic stability, with a focus on investments and defence cooperation. The latter expanded with continued Gulf states' interest in Türkiye's defence industry and joint production arrangements

Cooperation with the Gulf states has been most visible on Gaza and Syria's stabilisation and reconstruction. The Middle East conflict also nurtured Türkiye's connectivity strategy toward the Gulf, motivated by Turkish ambition to become the main land bridge between the Gulf and Europe. Qatar remained Türkiye's closest partner in the Gulf, while ties with Saudi Arabia deepened while relations with the United Arab Emirates relied on pragmatic cooperation despite geopolitical disagreements. Regional diplomacy included regular talks between the Foreign Ministers of Türkiye, Saudi Arabia, Egypt and Pakistan, notably in the context of the Iran war, culminating in the signature of the Mecca Joint Defence Agreement on 7 August 2026 between Türkiye, Saudi Arabia and Pakistan.

Türkiye and **Egypt** continued to step up cooperation in several areas, including resuming military ties. A joint naval exercise in September 2025 marked their first military drill in 13 years.

Türkiye's relations with **Israel** continued to deteriorate. Türkiye issued arrest warrants for dozens of Israeli officials, including the Prime Minister and Defence Minister. Türkiye strongly advocated for the recognition of Palestine and supported the UN General Assembly Resolution on the 'Peaceful settlement of the question of Palestine' (December 2025). Türkiye supported the US's Gaza ceasefire efforts and, together with Egypt and Qatar, it continued to engage on the implementation of the Gaza peace plan. Türkiye continued to provide substantial humanitarian assistance to Palestinians and is a member of the 'Ad Hoc Liaison Committee' and the 'Gaza Contact Group'. On the **Middle East peace process**,

Türkiye aligns with the EU on the need to relaunch the political process towards the two-state solution and is a member of the 'Global Coalition' for its implementation.

In post-Assad **Syria**, Türkiye has increased its leverage, established close relations with the Syrian transitional authorities, including through diplomatic presence and military cooperation. Türkiye supports Syria's sovereignty and territorial integrity and aims to create the conditions for additional returns of Syrians under temporary protection abroad. In October 2025, Türkiye extended the mandate of its troops deployed in Syria for three years. Ankara is providing training and advisory activities to Syrian soldiers and police, but in March 2026, pulled its civilian administrators from the area of the 'Operation Olive Branch', after seven years of presence. Türkiye repeatedly urged the Syrian Democratic Forces (SDF) to comply with agreements with Damascus towards the integration process into the Syrian army and supported the military operations carried out by the Damascus forces since January 2026 against Kurdish-controlled areas in Aleppo and northeast Syria. Türkiye welcomed SDF's decision to dissolve in August 2026.

Relations with **Iraq** continued to improve, including cooperation in the fight against terrorism, energy and water management as well as the 'Development Road' project, that would create a new route from Iraq toward Türkiye and Europe. In September 2025, oil flows through the Kirkuk-Ceyhan pipeline to Türkiye resumed. In October 2025, Türkiye extended the mandate of its troops deployed in Iraq for three years, diverging from EU policy. In February 2026, Türkiye and Iraq reached an agreement on the return of Turkish nationals suspected of ISIS affiliation following their transfer to Iraq from Al-Hol and Syrian prison.

Relations between Türkiye and **Iran** remained complex, characterised by intense geopolitical competition alongside pragmatic cooperation. Türkiye strongly opposed the Israeli and US military intervention in Iran but also condemned Iran's retaliatory strikes on the region, primarily on the Gulf countries, as well as attempted ballistic missiles attacks on its territory. Türkiye liaised closely with Pakistan, Saudi Arabia, Qatar and Egypt in support of mediation efforts that led to the Memorandum of Understanding between the US and Iran in June 2026, and which are still ongoing. It also called for the re-opening of the Strait of Hormuz and for freedom of navigation to be guaranteed. Given its 530 km border with Iran, Türkiye is also concerned with the prospect of a potential wave of migration (it currently applies a visa-free regime for Iranian nationals), as well as the activity of Kurdish militant groups along the border in the case of a vacuum or collapse of power in Iran.

Türkiye remained a pivotal and active player in **Libya**, continuing to advocate for stability and supported the efforts to revitalise the UN-facilitated political process. While keeping formal relations with Libya's internationally recognised Government of National Unity (GNU) based in Tripoli, Türkiye also significantly strengthened its diplomatic, military and economic outreach and presence in eastern Libya, with strong expectations that Benghazi would approve the Memoranda of Understanding signed with the Tripoli authorities on the demarcation of maritime zones (2019) – which has been ratified by the House of Representatives on 20 October 2026 – and on research and drilling in the delineated areas (2022). Both are considered by the EU as an infringement upon the sovereign rights of third states, which do 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. Türkiye worked to enhance the cooperation in the field of oil and gas exploration. In February 2026, Libya's National Oil Corporation granted exploration license to Türkiye's state-owned oil company TPAO.

Türkiye also continued to assert 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, had no bearing on the GNU. The EU's efforts to implement the UN embargo on Libya continued to be challenged by Türkiye's scepticism towards Operation EUNAVFOR MED Irini. Türkiye conducted joint

military exercises with the Libyan National Army's naval forces and, in December 2025, extended the mandate of its troops deployed to Libya by 24 months.

Türkiye increased its presence in and strengthened its relations with the **South Caucasus** and **Central Asia**.

The normalisation of Türkiye-Armenia relations continued to advance, with **Armenia** consistently stating its readiness to progress and Türkiye taking steps but stressing the importance of balance with respect to the normalisation of Armenia-Azerbaijan relations. The Turkish Vice-President attended the eighth summit of the European Political Community meeting, hosted by Armenia in May 2026. On the sidelines, the two countries signed a MoU on the restoration of the historic Ani Bridge. Türkiye's further positive steps towards normalisation of relations include launching daily direct flights between Yerevan and Istanbul by Turkish Airlines since March 2026. Preparations have also started for the rehabilitation of the Kars-Gyumri railway line and for opening the land border between Türkiye and Armenia. Türkiye also advanced trade relations with Armenia by adopting a new regulation allowing Armenia to be listed as the final destination for goods exported from Türkiye. Türkiye and **Azerbaijan** continued to engage in high-level political dialogue and hold frequent joint military exercises. Trilateral cooperation between Türkiye, Azerbaijan and Georgia continued through meetings of Foreign Ministers (June 2026), Defence Ministers (October 2025) and a Parliamentary meeting of Foreign Affairs Committees (February 2026).

Türkiye remained an important actor in **Central Asia**, combining bilateral engagement with a broader push for regional connectivity and cooperation. It has consistently supported enhanced EU engagement notably in economy, energy transit and connectivity, in line with its broader goal of positioning itself as a bridge between Europe, the Caucasus and Central Asia. At the multilateral level, Türkiye continued to promote a stronger role for the OTS, reflecting an expanding 'Turkic dimension' in its foreign policy. The EU and Türkiye held consultations on Central Asia in September 2026.

Türkiye's relations with **Pakistan** further strengthened at strategic partnership level, with strong defence, security, and diplomatic cooperation, including in the context of the newly signed Mecca Joint Defence Agreement. Türkiye contributed to mediate, together with Qatar, the October 2025 ceasefire agreement between Pakistan and Afghanistan. Türkiye maintained a pragmatic approach on **Afghanistan**, withholding formal recognition of the Taliban administration, while expanding economic, trade and diplomatic ties (Turkish embassy in Kabul). Türkiye hosts Afghan political opponents, though, without facilitating the formation of a joint opposition or armed resistance.

Türkiye continued to expand diplomatic and economic cooperation in **Asia** through its 'Asia Anew' initiative, aiming to strengthen its role as a strategic connector between Asia and Europe. Türkiye also continued its cooperation with **ASEAN,** in line with its status as a dialogue partner and further deepened its engagement in the region through its membership in the Asian Development Bank. It pursued diversified partnerships across key sectors, including defence industry cooperation, while building on ties with Muslim-majority countries, such as **Indonesia** and **Malaysia**. In November 2025, the President of **Republic of Korea** paid a state visit to Türkiye focused on defence industry cooperation, economy, nuclear energy and renewables.

Türkiye continued to seek opportunities to strengthen its economic and investments relations with **China**, aiming to reduce its structural trade deficit while expanding bilateral trade volumes. Cooperation remained focused on connectivity and infrastructure (including the potential complementarity between the Belt and Road Initiative and the Middle Corridor) and broader discussions on supply-chain resilience. The two sides held bilateral talks on key regional and global issues, including the Middle East, Ukraine, and the Global South agenda – often on the sidelines of multilateral fora like the G20, the Shanghai Cooperation Organisation (where Türkiye is a dialogue partner), and BRICS.

In **Africa**, Türkiye further stepped up its engagement. Its approach has focused on strengthening ties in defence industry, energy, mining, trade, and investment, alongside a growing emphasis on regional stability through diplomacy. As a supporter of the Sudanese Armed Forces and its allies, Türkiye has also engaged in broader peace efforts on Sudan (including participation in the Berlin Conference) and in support for various diplomatic initiatives addressing regional tensions. Engagement in the Horn of Africa - notably in Somalia - deepened, with expanded security cooperation and energy exploration activities. Türkiye maintained a firm stance against the recognition of Somaliland, reiterating its support for Somalia's territorial integrity. More broadly, Ankara continues to provide security assistance and counter-terrorism support to governments across the continent, including in West Africa. In June 2026, the EU and Türkiye held consultations on developments in Africa, reflecting shared interest in regional stability, maritime security, and crises management as well as possible economic cooperation.

Türkiye maintained its political and trade relations with **Latin America**, including on defence cooperation. Relations with **Venezuela** remained strong and, in June 2026, the Venezuelan Acting President met with the Turkish President in Istanbul. Türkiye and **Brazil** approved a five-year agreement for defence cooperation in September 2025 and developed their agricultural trade.

ANNEX I – RELATIONS BETWEEN THE EU AND TÜRKIYE

Türkiye is a key partner to the EU in many areas of joint interest and a candidate country. 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 is progressing in a phased, proportionate and reversible manner, subject to the established conditionalities.

Work intensified in 2024 and 2025 with the launch of the new High-Level Dialogue on Trade and the resumption of the High-Level Dialogue on Economy (both held twice), meetings of the High-Level Dialogues on Security and Migration, Climate, Science, Research, Technology and Innovation, and the intensification of political consultations on foreign and security policy with a focus on regional developments. The Council **Conclusions of December 2024** stressed that Türkiye's own constructive engagement will be instrumental in advancing the various areas of cooperation identified in the Joint Communication.

In October 2025, the Ministerial Meeting on Cross-Regional Security and Connectivity with partner countries from the Black Sea region, South Caucasus and Central Asia launched the Connectivity Agenda, opening a new strand of cooperation between the EU and Türkiye aiming to foster regional connectivity. In June 2026, the EU and the regional partners, including Türkiye, launched the Connectivity Agenda Platform which will provide a framework for participating countries, international financial institutions and other stakeholders to coordinate investments and policy action across transport, energy, digital connectivity and trade sectors.

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's Conclusions reconfirmed the 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. On 13 July 2026, the Commission appointed Executive Vice-President Raffaele Fitto as the Commission's Special Representative 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 2025, 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 2026, with the annex empty. Türkiye has not engaged in any unauthorised drilling activities in the Eastern Mediterranean since the beginning of 2021.

In December 2024, in its Conclusions, the Council expressed its serious concerns about the worrying backsliding and continued deterioration in the areas of democracy, the rule of law and fundamental rights. It reiterated the previous conclusion 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 before 2018, 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 having regular meetings throughout the reporting period. The meetings of the Association Council remain suspended in line with the 2019 Council conclusions.

The Commission continued engagement with Türkiye to discuss the **functioning of the Customs Union**, including a High-Level Dialogue on Trade on 13 October 2026. Türkiye

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made progress on reducing trade barriers since 2021 and took measures to prevent the circumvention of EU restrictive measures against Russia imposed in reaction to Russia's invasion of Ukraine. The EU expects further efforts in both areas. The Joint Communication of November 2023, 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, while maintaining a broader environment conducive to the resumption of Cyprus settlement talks.

Türkiye was the EU's fifth largest **trading partner** in 2025, while the EU continued to be Türkiye's largest partner, with bilateral trade reaching EUR 218 billion in total.

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 2.3 million refugees (as of August 2026), 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. 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.

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 1.3 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, 196 new schools (out of a target of 319) and delivering over 5.13 million healthcare consultations.

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 enlargement fundamentals including support to civil society, people to people contacts, rural development, cross-border cooperation and areas of common interest, mainly related to the green and digital transition, connectivity and competitiveness.

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 2025, with the EU contribution awarded to Turkish stakeholders since September 2025 exceeding EUR 67 million (the total EU contribution surpassed EUR 405.82 million over the first four years of Horizon Europe). The Turkey Investment Platform under the European Fund for Sustainable Development Plus (EFSD+) enables stronger EU support to investments through guarantee programmes in the three overarching policy priorities: the Green Deal, the Global Gateway as well as jobs and growth. It is expected to mobilise close to EUR 1.6 billion of investments in Türkiye. The European Investment Bank has re-engaged in Türkiye through two projects supporting SMEs in the area of energy efficiency, renewables and green industry totalling EUR 200 million, with the support of the EU budget guarantee.

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ANNEX II – STATISTICAL DATA

STATISTICAL DATA (as of 14/09/2026)

Türkiye

Basic data	Note	2013	2021	2022	2023	2024	2025
Population (thousand)		75 627 i	83 614 i	84 680 i	85 280 i	85 372 i	85 665 i
Total area of the country (km²)		780 272	780 270	780 270	780 270	780 270	780 270

National accounts	Note	2013	2021	2022	2023	2024	2025
Gross domestic product (GDP) (million national currency)		1 831 744	7 433 800	15 325 858	27 091 469	44 587 225	63 020 906
Gross domestic product (GDP) (million euro)		723 009	707 146	880 351	1 051 700	1 253 387	1 406 211
GDP per capita (euro)		9 480	8 050	9 930	11 860	14 140	:
GDP per capita (in purchasing power standards (PPS)		16 197	19 620	23 418	25 721	27 621	:
GDP per capita (in PPS), relative to the EU average (EU-27 = 100)		61.7	59.0	64.8	67.0	69.1	:
Real GDP growth rate: change on previous year of GDP volume (%)		8.5	11.8	5.4	5.0	3.3	3.6
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 (%)		:	:	:	:	:	:
Nominal unit labour cost index based on persons (3 year % change)		:	:	:	:	:	:
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 (%)		7.6	6.4	7.5	7.2	6.6	5.9
Industry (%)		22.5	28.8	29.0	25.6	22.2	20.5
Construction (%)		9.1	5.5	5.4	6.1	6.6	6.6
Services (%)		60.8 i	59.2 i	58.2 i	60.9 i	64.7 i	67.1 i
Final consumption expenditure, as a share of GDP (%)		72.9	65.1	65.0	67.3	68.7	68.6
Gross fixed capital formation, as a share of GDP (%)		28.8	28.4	30.5	32.9	31.3	30.6
Exports of goods and services, relative to GDP (%)		24.4	35.1	38.1	31.9	27.6	24.8
Imports of goods and services, relative to GDP (%)		28.7	34.6	41.8	33.8	27.0	25.1
Gross fixed capital formation by the general government sector, as a percentage of GDP (%)		:	:	:	:	:	:

Business	Note	2013	2021	2022	2023	2024	2025
Industrial production volume index (2015 = 100)		66.0	100.0	104.4	106.1	106.5	109.5

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Number of active enterprises (number)		2 906 413	3 513 272	3 706 578	3 788 414	:	:
Birth rate: number of enterprise births in the reference period (t) divided by the number of enterprises active in t (%)		13.8 i	16.4 i	16.3 i	15.5 i	:	:
Death rate: number of enterprise deaths in the reference period (t) divided by the number of enterprises active in t (%)		12.0 i	11.9 i	12.9 i	:	:	:
People employed in SMEs as a share of all persons employed (within the non-financial business economy) (%)		76.1 iw	74.0 iw	73.2 iw	72.6 iw	72.2 iw	:
Value added by SMEs (in the non-financial business economy) (EUR million)		96 328 iw	89 165 iw	143 240 iw	155 804 iw	233 180 iw	:
Total value added (in the non-financial business economy) (EUR million)		173 793 w	178 756 w	281 066 w	304 161 w	428 981 w	:

Inflation rate and house prices	Note	2013	2021	2022	2023	2024	2025
Consumer price index (CPI), change relative to the previous year (%)		7.5 d	19.6 d	72.3 d	54.0 d	58.5 d	34.9 d

Balance of payments	Note	2013	2021	2022	2023	2024	2025
Balance of payments: current account total (million euro)		- 37 178.1	- 5 110.6	- 43 928.5	- 38 722.1	- 12 243.5	- 27 598.5
Balance of payments current account: trade balance (million euro)		- 61 722.1	- 24 850.1	- 85 457.6	- 79 814.0	- 51 802.6	- 61 872.7
Balance of payments current account: net services (million euro)		30 099.3	27 960.7	50 559.5	51 468.3	56 594.4	55 501.9
Balance of payments current account: net balance for primary income (million euro)		- 6 517.2	- 9 016.8	- 8 719.1	- 10 889.4	- 17 106.8	- 20 743.7
Balance of payments current account: net balance for secondary income (million euro)		962.0	795.6	- 311.3	513.0	71.5	- 483.9
Net balance for primary and secondary income: of which government transfers (million euro)		342.2	355.2	- 583.1	- 762.6	- 159.2	- 464.9
*3 year backward moving average of the current account balance relative to GDP (%)		- 6.2	- 1.0	- 3.3	- 3.1	- 3.2	- 2.2
*Five year change in share of world exports of goods and services (%)		:	5.0	10.9	17.8	12.8	22.5
Net balance (inward - outward) of foreign direct investment (FDI) (million euro)		6 583.1 i	5 336.9 i	9 042.2 i	4 228.3 i	4 737.0 i	:
Foreign direct investment (FDI) abroad (million euro)		2 656.4	4 262.0	4 292.1	5 540.0	5 487.2	:
of which FDI of the reporting economy in the EU-27 countries (million euro)		:	1 805.9	2 197.9	2 650.3	2 358.3	:
Foreign direct investment (FDI) in the reporting economy (million euro)		9 239.5	9 598.9	13 334.3	9 768.3	10 224.2	:
of which FDI of the EU-27 countries in the reporting economy (million euro)		:	2 084.4	5 091.9	4 023.7	4 378.5	:
*Net international investment position, relative to GDP (%)		:	- 29.7	- 38.2	- 28.4	- 26.7	- 19.7
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

Public finance	Note	2013	2021	2022	2023	2024	2025
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 (%)		:	:	:	:	:	:

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Financial indicators	Note	2013	2021	2022	2023	2024	2025
Gross external debt of the whole economy, relative to GDP (%)		41.9 iw	51.2 iw	48.6 iw	43.3 iw	38.1 iw	35.6 iw
Gross external debt of the whole economy, relative to total exports (%)		189.0 w	131.4 w	112.0 w	121.2 w	122.8 w	132.2 w
Money supply: M1 (banknotes, coins, overnight deposits, million euro)		78 128.6 w	143 842.8 w	156 740.1 w	145 708.9 w	171 564.1 w	198 962.6 w
Total credit by monetary financial institutions to residents (consolidated) (million euro)		320 629.4	365 676.5	459 427.4	489 230.0	547 073.9	589 868.1
*Annual change in financial sector liabilities (%)		19.2	43.1	80.9	53.1	29.7	29.7
*Private debt, consolidated, relative to GDP (%)		70.9	84.9	63.2	56.0	46.5	48.7
Interest rates: day-to-day money rate, per annum (%)		5.62	17.87	13.16	18.69	48.95	43.72
Euro exchange rates: average of period (1 euro = … national currency)		2.534	10.512	17.409	25.760	35.573	44.816
Trade-weighted effective exchange rate index, 42 countries (2015 = 100)		120.58	30.71	17.85	12.52	9.16	7.38
*3 year change (T/T-3) in the trade-weighted effective exchange rate index, 42 countries (2015 = 100)		- 0.21 iw	- 0.45 iw	- 0.64 iw	- 0.69 iw	- 0.70 iw	- 0.59 iw
Value of reserve assets (including gold) (million euro)		7 481.2	19 405.7	13 110.7	- 1 949.6	691.1	- 20 388.7

External trade in goods	Note	2013	2021	2022	2023	2024	2025
Value of imports: all goods, all partners (million euro)		189 784	219 224	324 441	311 586	296 606	304 057
Value of exports: all goods, all partners (million euro)		114 563	180 299	223 777	214 180	219 316	219 953
Trade balance: all goods, all partners (million euro)		- 75 222	- 38 925	- 100 663	- 97 406	- 77 291	- 84 104
Terms of trade (export price index / import price index * 100) (number)		92.5 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 (%)		35.7 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 (%)		34.3 iw	31.1 iw	25.5 iw	29.0 iw	32.0 iw	:

Demography	Note	2013	2021	2022	2023	2024	2025
Crude rate of natural change of population (natural growth rate): number of births minus deaths (per thousand inhabitants)		12.0	6.1	6.2	5.1	5.2	4.7
Infant mortality rate deaths of children under one year of age (per thousand live births)		10.8	9.3	9.2	10.0	9.0	:
Life expectancy at birth: male (years)		75.4	:	74.3	74.8	76.4 b	:
Life expectancy at birth: female (years)		81.1	:	78.4	79.8	81.7 b	:

Labour market	Note	2013	2021	2022	2023	2024	2025
Economic activity rate for persons aged 20–64: proportion of the population aged 20–64 that is economically active (%)		58.4	61.2 b	63.1	63.1	64.0	63.4
Employment rate for persons aged 20–64: proportion of the population aged 20–64 that are in employment (%)		53.4	53.9 b	56.5	57.3	58.5	58.1
Male employment rate for persons aged 20–64 (%)		75.3	73.6 b	75.9	76.5	77.5	77.1
Female employment rate for persons aged 20–64 (%)		31.8	34.2 b	37.0	38.0	39.4	39.1
Employment rate for persons aged 55–64: proportion of the population aged 55–64 that are in employment (%)		31.5	33.6 b	34.9	36.3	38.5	38.1

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Employment by main sectors							
Agriculture, forestry and fisheries (%)		22.9 i	17.2 bi	15.7 i	14.6 i	14.6 i	13.9 i
Industry (%)		19.4 i	21.4 bi	21.7 i	21.3 i	20.7 i	20.3 i
Construction (%)		7.0 i	6.1 bi	6.0 i	6.3 i	6.6 i	6.8 i
Services (%)		50.7 i	55.3 bi	56.6 i	57.8 i	58.1 i	59.0 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 (%)		8.8	12.0 b	10.5	9.4	8.8	8.4
Male unemployment rate (%)		8.0	10.7 b	9.0	7.7	7.1	6.9
Female unemployment rate (%)		10.6	14.7 b	13.5	12.7	11.8	11.4
Youth unemployment rate: proportion of the labour force aged 15–24 that is unemployed (%)		16.9	22.7 b	19.5	17.5	16.4	15.4
Long-term unemployment rate: proportion of the labour force that has been unemployed for 12 months or more (%)		1.9	3.7 b	2.5	2.0	1.7	1.5
Unemployment rate for persons (aged 25–64) having completed at most lower secondary education (ISCED levels 0-2) (%)		7.3	10.4 b	8.6	7.6	7.1	7.0
Unemployment rate for persons (aged 25–64) having completed tertiary education (ISCED levels 5-8) (%)		6.9	10.0 b	9.4	8.2	7.6	7.1

Social cohesion	Note	2013	2021	2022	2023	2024	2025
Average nominal monthly wages and salaries (national currency)		1 509 w	3 904 w	4 742 w	8 568 w	17 480 w	31 587 w
Index of real wages and salaries (index of nominal wages and salaries divided by the inflation index) (2016 = 100)		:	:	:	:	:	:
Gini coefficient		:	43	45	44	45	44
Poverty gap		27.9	27.0	24.8	24.7	24.3	24.8

Standard of living	Note	2013	2021	2022	2023	2024	2025
Number of passenger cars relative to population size (number per thousand population)		121.0	162.0	167.0	178.0	189.0	203.0 i

Infrastructure	Note	2013	2021	2022	2023	2024	2025
Density of railway network (lines in operation per thousand km²)		12.5 i	13.5 i	13.7 i	14.6 i	14.6 i	:
Length of motorways (kilometres)		2 244	3 532	3 633	3 726	3 796	:

Education, Innovation and Research	Note	2013	2021	2022	2023	2024	2025
Percentage of persons aged 30-34 with a tertiary education level (ISCED 2011 levels 5 to 8)		19.5	35.5 b	37.6	39.9	41.7	43.2
Percentage of persons aged 30-34 with a tertiary education level (ISCED 2011 levels 5 to 8), males		21.1	36.0 b	37.4	39.2	40.3	41.6

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Percentage of persons aged 30-34 with a tertiary education level (ISCED 2011 levels 5 to 8), females		17.9	35.1 b	37.9	40.5	43.1	44.8
Participation in early childhood education (children aged 3 and over)		27.7 w	31.7	48.6	54.9	55.0	:
Participation in early childhood education (children aged 3 and over), males		28.2 w	32.1	48.9	55.3	55.3	:
Participation in early childhood education (children aged 3 and over), females		27.2 w	31.3	48.3	54.5	54.7	:
Low achieving 15-year-olds in reading (%)		:	:	29.3	:	:	:
Low achieving 15-year-olds in mathematics (%)		:	:	38.7	:	:	:
Low achieving 15-year-olds in science (%)		:	:	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		37.5	23.1 b	21.2	19.5	18.7	17.9
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		35.0	23.9 b	22.2	20.1	19.6	18.7
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		39.9	22.2 b	20.2	19.0	17.8	16.9
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks)		4.5	6.5 b	6.7	7.4	8.0	7.5
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), men		4.6	6.5 b	6.4	7.0	7.3	6.7
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), women		4.5	6.5 b	7.0	7.8	8.6	8.2
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	:	31.5
Share of individuals having at least basic digital skills (% of population aged 16-74), males		:	34.0	:	36.8	:	34.1
Share of individuals having at least basic digital skills (% of population aged 16-74), females		:	26.2	:	29.4	:	28.9
Public expenditure on education relative to GDP (%)		:	:	:	:	4.0 iw	:
Gross domestic expenditure on R&D relative to GDP (%)		0.81	1.37	1.30	1.39	1.46	:
Government budget appropriations or outlays on R&D (GBAORD), as a percentage of GDP (%)		0.37	0.37	0.35	0.36	0.40	0.37 p
Percentage of households who have internet access at home (%)		49.1	92.0	94.2	95.5	96.5	96.2

Environment	Note	2013	2021	2022	2023	2024	2025
Index of greenhouse gas emissions, CO_2 equivalent (1990 = 100)		195.9 ew	251.3 ew	245.2 ew	242.5 ew	255.3 ew	:
Energy intensity of the economy (kg of oil equivalent per 1 000 euro GDP at 2015 constant prices)		163.5	157.0	146.8	142.2	144.3	:
Electricity generated from renewable sources relative to gross electricity consumption (%)		28.1 w	35.6 w	41.6 w	41.8 w	46.1 w	:
Road share of inland freight transport (based on tonne-km) (%)		95.2 w	95.6 w	95.7 w	96.5 w	96.6 w	:

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Energy	Note	2013	2021	2022	2023	2024	2025
Primary production of all energy products (thousand TOE)		29 092	46 208	50 484	48 870	54 543	:
Primary production of crude oil (thousand TOE)		2 370	3 518	3 663	4 206	5 454	:
Primary production of solid fuels (thousand TOE)		13 542	17 151	18 835	14 682	15 805	:
Primary production of gas (thousand TOE)		443	324	312	665	1 858	:
Net imports of all energy products (thousand TOE)		86 645 i	115 096 i	113 942 i	114 008 i	116 343 i	:
Gross inland energy consumption (thousand TOE)		114 029	161 774	159 458	162 366	170 163	:
Gross electricity generation (GWh)		240 154	334 723	328 379	331 149	354 570	:

Agriculture	Note	2013	2021	2022	2023	2024	2025
Agricultural output volume index (at producer prices) (2015 = 100)		:	:	:	:	:	:
Utilised agricultural area (thousand hectares)		:	38 038.0	38 450.0	38 563.0	38 596.0	:
Livestock numbers: live bovine animals (thousand heads, end of period)		14 532.9	18 036.1	17 023.8	16 583.0	16 986.3	17 709.0
Livestock numbers: live swine (thousand heads, end of period)		:	:	1.7 e	1.7	1.7	1.4
Livestock numbers: live sheep and live goats (thousand heads, end of period)		38 509.8 i	57 519.2 i	56 265.8 i	52 363.4 i	54 902.7 i	57 874.3 i
Raw milk available on farms (thousand tonnes)		:	:	:	:	:	:
Harvested crop production: cereals (including rice) (thousand tonnes)		37 129.4	32 602.0	39 562.1	43 176.3	39 922.3	:
Harvested crop production: sugar beet (thousand tonnes)		16 483.0	18 250.0	19 000.0	23 498.0	22 999.0	:
Harvested crop production: vegetables (thousand tonnes)		28 820.0	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 time series
d = definition differs
e = estimated
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

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