

TÜRKIYE AND THE WORLD INITIATIVE

Strategic Autonomy as a Dynamic of Convergence in Türkiye-EU Relations

Sinan Ülgen, Sophia Besch, İlke Toygür

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Introduction

In a recent cabinet meeting in July, Turkish President Recep Tayyip Erdoğan stated, “in a period when our region is constantly on edge, establishing new equations in foreign policy is not just a choice but a necessity for Türkiye.”¹ This quote succinctly encapsulates the country’s impulse to pursue strategic autonomy under the Justice and Development Party’s (AKP) regime over the last decade. Characterized by endeavors to establish “flexible partnerships” and engage in hedging among them, to decouple from the West, and to act more assertively in the international field to advance its national interests, Türkiye’s foreign policy has been deemed by analysts as a “re-orientation” and rupture with the country’s diplomatic past.² Strategic autonomy, as both a doctrine and a goal, is perhaps best understood and defined by the London School of Economics academic Rohan Mukherjee, who views it in terms of positive and negative liberties.³ On the positive side, strategic autonomy ensures the freedom to pursue certain objectives and interests, and on the negative side, it provides the freedom to behave independently from external influences. In the case of Türkiye under the AKP, the pursuit of strategic autonomy is compounded by the desire to be a regional hegemon with certain ideological undertones that emphasize the country’s non-Western identity.

At a time of tectonic shifts in global power dynamics, strategic autonomy has also become a priority for the EU. To prepare for a future in which the United States is resetting its priorities, the EU recognizes the need to reduce its dependencies and increase its capacity to respond to geopolitical challenges. Hence, it has designed and launched a series of policy initiatives that aim to enhance its geopolitical and economic security.

This paper highlights the potential complementarities of Türkiye and EU efforts, as well as explores opportunities for cooperation as they seek enhanced strategic autonomy. But first, it analyzes the origins, drivers, and motivations behind this tenet of each actor’s foreign policy.

The Drivers of Turkish Strategic Autonomy

Strategic autonomy has emerged as a guarantor of sovereignty and national identity that aims to unite the polarized fragments of the Turkish political scene. It has manifested in various policies over the years, most notably taking shape with former prime minister Ahmet Davutoğlu’s “Strategic Depth” doctrine.⁴ Evolving in line with global developments and domestic prerequisites, it is now a major component of Erdoğan’s “Century of Türkiye” and vision for the country’s future.⁵ Whether it be Türkiye’s role as a NATO member, its relations with the United States and the EU, or its economic partnerships with China and Russia, the pursuit of strategic autonomy has wide scale implications. The pursuit has been an incremental process, occurring in tandem with changes in international, regional, and domestic scenes. The shifts at all three levels have reinforced one another, creating new or dismantling old alignments along the way.

Internationally, the shift toward multipolarity in the twenty-first century—propelled by the politico-economic rise of the group known as BRICS (Brazil, Russia, India, China, and South Africa)—has reconfigured power as it becomes more ambiguous and convoluted.⁶ The financial crisis in 2007–2008 signaled to the world the relative ineffectiveness of Western economic institutions and induced the emergence of new institutional structures, such as the Asian Infrastructure Investment Bank.⁷ Similarly, seeing the insufficient, or even selective, responses from the United States and EU toward repeated deviations from the rules-based and human rights-oriented norms of the international order, states have become emboldened to prioritize their self-interests over collective cooperation and security.

From Ankara’s view, underlying the disorientation of the global order is a diminishment of the role of the United States and EU in certain regions. The U.S.-instigated withdrawal from Afghanistan in 2021 could be seen as a symbol of this diminishment. The power vacuum created by the U.S. retrenchment and/or pivot to Asia is another feature of the changing constellation of state power. Against such a global backdrop, Turkish policymakers no longer feel beholden to a U.S.-led Western-dominated agenda. Although a NATO member, Türkiye has been looking to expand its list of non-Western partners, including but not limited to Russia and China. This reappraisal has also been facilitated by mounting frustrations over the evolution of bilateral relations with the United States and EU as Türkiye’s major and traditional partners.

Divergence with Washington over its Middle East policy became especially accentuated when the United States began pragmatically cooperating with the Kurdish Democratic Union Party in battling the self-proclaimed Islamic State.⁸ In response to this cooperation, as well as the U.S. administration’s unwillingness to address Ankara’s grievances about the Fethullah Gülen movement in the post-2016 coup environment, the Turkish leadership and public at large have become increasingly disillusioned and frustrated with the United States’ being dismissive of Türkiye’s security anxieties. The Transatlantic Trends 2022 survey conducted by the German Marshall Fund indicated that 67 percent of Türkiye’s citizens believe the United States is playing a negative role in the international arena.⁹ Similarly, souring

relations with the EU after the failed membership accession process also have contributed to the growing anti-West sentiment permeating Türkiye. In addition to the dimmed possibility for membership, the EU has effectively categorized Türkiye as a “privileged partner” for trade and not a European “insider.”¹⁰ A watershed moment in their bilateral relations was Cyprus’s accession to the EU and the subsequent failure to resolve the Cyprus problem linked to the ongoing political division of the island. These compounding political issues have given rise to the transactional and issue-based cooperation that has defined EU-Turkish interdependence over the past few years.

Strategically positioned as a bridge between the East and West, Türkiye has historically aligned itself with the Western block as a NATO member and EU candidate country. Now, having adopted its version of strategic autonomy, it ostentatiously oscillates between powers.¹¹ In a more interdependent, “post-Western,” and nonbinary world, Türkiye is attempting to transform itself into one of the many poles of power.

It is important to underline that the instability that characterizes multipolarity is bolstering security-oriented thinking. The specific strategic culture of Türkiye, which shapes the way it projects itself into the international system, is largely influenced by its security discourse. Stemming from the century-long fear of foreign-induced fragmentation of the Turkish state—a phenomenon called the Sèvres Syndrome—a constant fear of being surrounded by hostile forces is ever-present.¹² The Arab Uprisings left in their wake collapsing states, civil wars, and proxy conflicts all across Türkiye’s borders, inevitably heightening this fear. The conflict in the Eastern Mediterranean over territorial waters, exclusive economic zones, and gas resources has also fed a similar sense of isolation. The 2019 border demarcation agreement with the Libyan Government of National Accord cannot be scrutinized without first acknowledging the sense of “diplomatic encirclement” fostered by Türkiye’s exclusion from the East Mediterranean Gas Forum.¹³ Rather than being irredentist and expansionist at its core, strategic autonomy must be understood as a response to changes to the status quo happening at and beyond Türkiye’s borders.

Domestically, the narrative of strategic autonomy has been useful in rallying voters around the flag. Erdoğan’s anti-West discourse has granted him the approval of Eurasianists and Islamists alike. His latest condemnation of the West for having double standards and of Israel for committing “genocide” in the war against Hamas evinces this.¹⁴ The political rhetoric has also allowed him to further portray himself as the leader of the global Islamic “ummah.” Accusing the EU of Islamophobia, consolidating ties with the Muslim Brotherhood in the post-Arab Uprisings landscape of the Middle East, and sending development aid and military assistance to Muslim-majority African countries such as Somalia are some of the visible articulations of this aspiration.

The narrative of strategic autonomy has also been complemented by a focus on populist techno-nationalist rhetoric echoed in campaign speeches and addresses to the nation. It was, for instance, remarkable to observe how much Erdoğan mentioned the country’s defense industry achievements in his 2023 presidential campaign. While campaigning,

he participated in the inauguration ceremonies of major defense industry projects, such as: KAAN, an indigenous fighter jet; TCG Anadolu, the largest of the Navy's ships; and the combat drone Kizilelma.¹⁵ By painting his foreign policy brinkmanship as the manifestation of national identity and interest, Erdoğan has been able to discredit the domestic opposition by labeling them as anti-nationalists.¹⁶ Interestingly, Türkiye's political opposition has been particularly inept in developing a political response to this framing. More often than not, they have opted to back this security-led foreign policy narrative.¹⁷ Finally, the erosion of democratic norms has also been a factor in stalled relations with Western nations, but it has not impeded the deepening of ties with non-Western autocracies.

Implementation of Strategic Autonomy

When analyzing Türkiye's strategic hedging toward Russia and its relations with China, it becomes all the more clear that pragmatic considerations are at the heart of foreign policy under the AKP. In its acts of balancing, Türkiye has fortified diplomatic ties with the two major non-Western powers.

Russia, as a major economic partner, has offered a mutually beneficial relationship of competitive cooperation.¹⁸ From increased tourism, trade, and energy to diplomatic engagement in the Organization of the Black Sea Economic Cooperation, Türkiye participates in strategic hedging with Russia.¹⁹ Although Türkiye and Russia almost always support different sides of regional conflicts, such as in Syria, their peculiar relationship is marked by sympathizing with each other's interests and concerns. For example, Türkiye and Russia worked together in the Nagorno-Karabakh conflict of 2020, even though they have historically backed different sides. They also established a "conflictual camaraderie" while cooperating through the Astana Process, which was focused on managing the Syrian conflict.²⁰ Furthermore, Türkiye's bilateral trade volume with Russia increased by 198 percent in the first nine months of the Ukraine war.²¹ Bilateral trade was then curtailed under Western pressure.

Türkiye has also been seeking to significantly deepen its economic engagement with China. Massive infrastructure projects in Türkiye have been contracted out to Chinese firms, most notably the Ankara-Istanbul high-speed railway. More recently, the Turkish government signed an agreement with the Chinese electric vehicle maker BYD, which stipulates that China will invest in a \$1 billion car factory in Türkiye.²² Additionally, to attract foreign direct investment from China, Türkiye has joined Beijing's Belt and Road Initiative.²³ In the same vein, Ankara has expressed its desire to become a member of BRICS+ and the Shanghai Cooperation Organisation.²⁴

All of these endeavors lead to one unwavering conclusion: with its proactive pursuit of strategic autonomy and interactions with both Moscow and Beijing, Ankara is planning pragmatically. It is diversifying its alliances and balancing its East and West alignments. This rebalancing is also part of a domestic narrative infused with ideological undertones that emphasize Türkiye's non-Western identity; for Erdoğan, conducting a foreign policy that appeals to the masses is the key to staying in power.

Framing Türkiye as a transregional power that can bargain with the EU and United States as an equal and as a connectivity hub for the East and West remains the underlying objective of Turkish foreign policy. It is important to note, however, that the legacy of the Ottoman Empire and the nationalist self-conception of Türkiye as a potent regional actor remain important residues that contribute to foreign policy agenda-setting. The Turkish sense of insecurity has long permeated policymaking, given its strategic culture, and will continue to shape its engagements with regional neighbors and transnational alliances.

Strategic Autonomy's Pitfalls

It is clear that strategic autonomy, at its core, is about projecting Türkiye as a regional power capable of forging its own path in the international system, but the current policies aimed at attaining this autonomy have not accounted for their long-term implications.

While founded on the quest for limiting dependency, the foreign policy objective of strategic autonomy, as pursued by Türkiye's current political leadership, has arguably exacerbated dependencies—albeit on the East rather than the West. Ankara's ambiguous and nonaligned directives within the international order have raised suspicion around Türkiye's intentions, hindering its path toward a more effective autonomy. The world may now be multipolar, but international institutions are still dominated, to an extent, by transatlantic powers. The United Nations Security Council has not yet been reformed, and the EU exerts enormous weight on the trade policy that the Turkish economy is highly reliant on. Moreover, it is politically untenable for the Turkish regime to negate the Western institutional framework; anti-Westernization and a shift eastward imply abandoning democratic values and respect for the rule of law, which portends future political instability.

Also, economically, Ankara's form of strategic autonomy is unsustainable. The EU remains by far the biggest trading partner of Türkiye, with trade reaching the \$310 billion mark in 2023.²⁵ And, notably, Turkish exports were equal to \$153 billion, while the EU's exports to Türkiye amounted to \$160 billion, showcasing a symmetric distribution. By comparison, trade with Russia and BRICS countries skews highly in their favor, exacerbating an already severe trade deficit. For instance, in 2023, Türkiye's imports from China (\$43 billion) were twelve times more than its exports (\$3.5 billion).

To advance its foreign policy interest in an ever more complex global and regional order and to reconcile the order's inherent dichotomies, the Turkish political leadership has permanently invested in efforts to enhance the country's strategic autonomy. However, the identified, mostly structural, pitfalls are set to hinder the effectiveness of these aspirations. It is, therefore, an opportune time to explore whether a closer partnership with the EU can help Turkish policymakers overcome these challenges. In other words, it is a good time to identify what forms of association and engagement with the EU could allow Ankara to shift toward a more realistic framework of strategic autonomy that would still nurture the goals of regional leadership, economic revitalization, and closer alliances.²⁶

The EU's Strategic Autonomy Aspirations

Geopolitics of Strategic Autonomy

The concept of strategic autonomy in the EU context has its early roots in the security and defense spheres. The EU has tried to bolster its independent military capabilities since the launch of its Common Security and Defence Policy in the late 1990s. The urgency of these efforts increased during U.S. president Donald Trump's time in office, when he clearly signaled that the European continent will no longer be a priority. The EU introduced several defense initiatives to enhance its military strength, including, in 2017, the Permanent Structured Cooperation (PESCO) framework that aims to deepen defense cooperation between EU members, and, in 2021, the European Defence Fund that was set up to finance joint defense research and development.

European strategic autonomy thus became a core umbrella concept to turn Europe into a more capable security and defense actor. The European Parliament and the European Council had adopted strategic autonomy as an objective years ago, but growing doubts about the reliability of the United States as an ally thrust the idea into the limelight. The 2016 Global Strategy for the European Union's Foreign and Security Policy acknowledged that the EU needs to complement the security umbrella of NATO and must be able to assume responsibility for its own security.²⁷ It proposed increased defense spending, an integrated defense industry, and the development of joint capabilities.

A year later, in his much-discussed Sorbonne speech, French President Emmanuel Macron reiterated his vision of an EU with a deeply integrated security and defense policy.²⁸ He became a spokesperson for a more independent EU defense and industrial policy over the course of the Trump presidency, but other EU member states remained divided on whether strategic autonomy was desirable. Many nations, such as Germany or Poland, voiced concern that it would undermine NATO by duplicating the alliance's efforts and alienating the United States.

Russia's full-scale invasion of Ukraine in 2022 unequivocally reaffirmed NATO's foundational purpose, dispelling previous assertions of the alliance's "brain death" (not coincidentally, perhaps, also a Macron-ism).²⁹ While NATO took the lead on shaping European defense, deterrence, and reassurance, Europeans looked to the EU for leadership in imposing sanctions on Russia, supplying training and lethal support to Ukrainian forces, and shaping Ukraine's future economic and political integration into the EU.

In this vein, the European Commission—acknowledging the huge capability gaps exposed by the Russia-Ukraine war and drawing on the EU's strength as a regulatory market power—adopted a range of new defense industrial tools, initiatives, and strategies. With these, the institution pursued dual objectives: to replenish European armament stocks and encourage more capability aid to Ukraine, while also pursuing the broader goal of bolstering European defense industries in the long term.

In the EU's Strategic Compass action plan, adopted one month after Russia invaded Ukraine, the union put an emphasis on partnership, declaring its intention to expand its relationship with numerous multilateral and regional organizations and to develop and tailor new bilateral partnerships. Since then, Brussels has established new security and defense dialogues with Iceland, Norway, and the United States. In May 2024, Moldova became the first country to sign a bilateral Security and Defense Partnership with the EU. One week later, the EU and Norway signed a similar declaration.

Geoeconomics of Strategic Autonomy

In parallel with the above efforts, EU policymakers started to apply the concept of strategic autonomy to the larger geoeconomic context as well. The trigger was geopolitically induced changes in the multilateral economic rules-based order. In the wake of Russia's annexation of Crimea in 2014, Brexit, and the first presidential term of Trump, a geopolitically as well as geo-economically resilient EU, became increasingly politically expedient. The COVID-19 pandemic and the 2022 full-scale Russian invasion of Ukraine increased the urgency for a resilience roadmap. While the pandemic underscored the pitfalls of a deeply globalized economy, the invasion brought interstate war back onto European soil and highlighted the vulnerabilities of member states' energy supply chains.

In response, EU member states extended the concept of strategic autonomy to encompass more chokepoints and dependencies in economic policy areas. This more acute backdrop of geopolitical tensions has further exposed additional geoeconomic vulnerabilities that the EU aims to address by promoting this foreign policy strategy. These vulnerabilities include access to enabling technologies, digital services, and the supply of raw materials and semi-processed goods across four vital sectors: energy, digital technology, healthcare, and food security.

To address these vulnerabilities and strengthen its autonomy and economic security, the EU has introduced a series of nine lines of action aligned with its principles, goals, and values related to the environment, economy, social justice, competitiveness, and cohesion. These lines include fostering and securing the EU's internal production capacities of goods and technologies; the need to monitor and limit foreign ownership or control of non-like-minded countries over strategic sectors and critical infrastructures while encouraging the presence of foreign companies of like-minded countries; the establishment of contingency plans to respond to future shortages through strategic reserves and the upscaling of production capacities; the need to achieve autonomy and foster circularity in full alignment with the global environmental emergency; and the need to reduce foreign dependencies by making raw materials more accessible through supplier diversification.³⁰

Having said that, despite increasing internal capabilities, efficiency, and competitiveness, the EU will always rely on the global economy to prosper. In this sense, the strategic autonomy objective must also be understood as an effort to rebalance the EU's position in the global geoeconomic landscape, particularly regarding its economic relations with China. Protecting the EU's Single Market, de-risking and reducing dependence on Chinese imports, and

achieving a more level playing field are key characteristics of the strategy. This approach should allow the EU to cooperate and compete both with China and the United States rather than choose one over the other. This explains the conceptualization of “open strategic autonomy” by Spain during their presidency of the Council of the EU.

Implication of the EU’s Strategic Autonomy Aspirations

In the economic realm, strategic autonomy entails revamping the EU’s existing relationships and developing new ones with like-minded actors. It also involves the diversification of the EU’s engagements, the expansion of its trade ties, and the strengthening of its supply chains, including in critical raw materials, goods, and services. Yet to succeed in this endeavor, the EU needs to provide mutually beneficial opportunities for third countries. Championing the reform of multilateral institutions to help achieve greater inclusiveness and representation is a part of this strategy.

The EU’s overriding objective is to shape its foreign policy and relations with third countries in a way that not only yields benefits but also brings the added value of inherently enhancing its autonomous decision-making capacity. By building a wider and deeper network of international partnerships, the EU can avail itself (and its interlocutors) greater flexibility in action, while nurturing a level of interdependence with other players where it holds sway.

Efforts to provide third countries with an alternative to the bipolar order defined by U.S.-China power competition would resonate strongly with the Global South and strengthen the EU’s appeal as a like-minded actor.

The strategic partnership agreements the EU signed with Chile, Kazakhstan, and Japan are perfect examples of the smart practice of building synergies with third parties in a way that not only advances the EU’s sphere of interest, but also empowers the nations concerned.³¹ In each instance, the EU built a certain degree of interdependence with local industries in these countries, which offset mutual dependencies on China or Russia.

The EU’s Global Gateway initiative is another good example of how the EU is advancing its strategic autonomy.³² This effort promotes smart, clean, and secure links in the digital, energy, and transport sectors, as well as strengthens health, education, and research systems worldwide. This connectivity provides an alternative to China’s Belt and Road Initiative. The EU could therefore focus on the initiative’s deliverables and the high standards it offers in good governance, ownership, and sustainability. The India–Middle East–Europe Economic Corridor initiative launched during the G20 summit in New Delhi in September 2023 is another major infrastructure effort that offers similar opportunities involving both the EU and the United States.³³

However, the EU’s desire to manage its economic security through reducing geoeconomic vulnerabilities could, at times, come into tension with its strategic autonomy aspirations.

Risks cannot be mitigated without building alternative supply chains, which can only be achieved through a proactive geoeconomic approach emphasizing the EU's strengths in key sectors. Ultimately, the EU's strategic autonomy will depend on its ability to integrate Global South and third countries into more resilient and equitable relationships, while at the same time leveraging the EU's economic strengths.

In the field of security and defense, the EU's approach to cooperation with third countries is built around three tenets: membership brings special privileges, partnerships are built based on shared values and principles, and all partners should receive equal treatment. The path to closer security and defense cooperation is unlocked by entering into specific agreements: the establishment of bilateral security and defense dialogues, the signing of security of information agreements, or an administrative arrangement with the European Defence Agency.

In reality, politics and geopolitical interests determine the degree of cooperation between the EU and its partners. The evolution of the EU-UK relationship after the Brexit referendum demonstrates this clearly. A period of animosity and stagnation after UK prime minister Boris Johnson's government cold-shouldered the idea of developing a structured foreign, security, and defense partnership with Brussels was followed by a period of pragmatic cooperation when EU-UK interests aligned in the Russia-Ukraine war. The recent change of government in London has ushered in a fresh air of political goodwill, and clearly, the UK's defense capabilities make the country a valuable partner for the EU.

There are concerns that over time an increased EU role in defense could gradually alter the nature of defense collaboration and also potentially exclude third countries, including at the industry level. But a singular focus on the EU's expansive list of initiatives in motion disregards a key point. Member states have so far been reluctant to cede any of their jealously guarded defense policy and procurement decision making authorities. Procurement from extra-EU countries has continued without any internal coordination. In fact, the war in Ukraine has exacerbated this dynamic. Meanwhile, the stronger transatlantic credentials of U.S. President Joe Biden's administration have somewhat dampened the EU's simmering aspirations for strategic autonomy that had been rekindled during the Trump era.

Of course, the specter of Trumpism remains, especially with structural trends pulling the United States away from Europe. Hence, the debate over the need to strengthen the European defense pillar—a concept from the 1990s—is seemingly here to stay.

The prospect of a lasting U.S. pivot away from Europe has succeeded in uniting member states previously unable to agree on an EU-led strategic autonomy in defense. But this unanimity comes at a cost: the idea of a European defense pillar does not clarify its starting premise, namely the likely future role of the United States in European defense. The pillar does not prescribe whether Europeans should (1) prioritize better burden-sharing and thereby keep the U.S. "in" or (2) invest their efforts in burden-shifting to effectively replace U.S. capabilities that Washington may be inclined to deploy in other theaters. Nevertheless, the pragmatic all-hands-on-deck framing of the European defense pillar allows for a more

constructive approach to defense that rises above ideological divides and focuses on bringing together European capacity at an international level, inside NATO, through the EU, and through intergovernmental coalitions—all in service of a collective continental effort. For instance, this more pragmatic framing enables the EU to facilitate Türkiye's involvement in European foreign, defense, and security policy matters, especially as a capable NATO ally.

The Quest for Strategic Autonomy as a Driver of Türkiye-EU Convergence

The panoply of novel policies enshrined within the EU's and Türkiye's strategic autonomy could foster the conditions for a new understanding of cooperation between the two. Their prevailing geopolitical and geoeconomic interdependencies allow for the creation of mutually beneficial avenues of cooperation. The robustness of this cooperation will very much depend on the political will on both sides. These opportunities can be categorized into separate economic and geopolitical baskets.

Deepening Economic Linkages

Given its well-developed, diversified industrial base and its endowments in critical materials, Türkiye has the potential to contribute to the EU's strategic autonomy objective of enhancing economic security and resilience. Türkiye already has a significant role in the international production and supply chains of EU-based multinational companies. As evidenced by a World Bank study, Türkiye is an advanced manufacturing country with a deepening participation in global value chains.³⁴ Meanwhile, the EU remains the destination for more than 50 percent of exports by Türkiye's domestic companies included in global value chains, demonstrating the robustness of linkages in manufacturing industries between Türkiye and the EU. A closer alignment on industrial policy objectives and instruments between the two partners could therefore significantly increase mutual resilience in supply chains at a time when the objective of ensuring economic security has acquired critical importance.

Türkiye is also an indispensable supplier of many critical raw materials for the EU. In a significant move, Ankara recently opted to join the U.S.- and EU-led Minerals Security Partnership Forum.³⁵ This institutional partnership is expected to benefit Turkish rare earth infrastructure through credit lines and tech transfers and offers a humble alternative to Beijing's BRI. More broadly, a deeper cooperation with the EU at all stages of the supply chain—from the exploration, extraction, and processing of such raw materials to their utilization—should mutually enhance economic resilience.

Regarding the green and digital transformations, the two parties could consider signing a digital economy agreement. Ambitious provisions could include paperless trade and e-payments to enhance end-to-end digital trade, ensure reliable data flows, increase trust in digital systems, and increase the participation of small- and medium-size enterprises in the digital economy. Similarly, Türkiye could be better integrated into the EU's green transition policies. The slated modernization of the 1996 Türkiye-EU Customs Union could provide the relevant institutional impetus for the achievement of these objectives.³⁶

As two partners facing similar geopolitical challenges, with high levels of interdependence between their economies and a vision of economic and political integration, the EU and Türkiye should also contemplate an agenda for joint action in trade and investment promotion policies toward third entities. From that perspective, the African continent is a significant theatre of potential cooperation given Türkiye's significant footprint there. The EU's Global Gateway program can be leveraged to incentivize African-centered modes of cooperation. More concretely, this instrument can be used to pave the way for Turkish companies that want to take part in large-scale projects in African countries to operate with EU financial support under schemes of effective trilateral cooperation.

Improving Defense Industry Collaboration

Türkiye could similarly add value to the EU's efforts to rapidly and effectively upgrade its defense industrial base. Unfortunately, this opportunity has so far been hindered by political obstacles and policy misalignments.

The EU often cites the low level of alignment between Türkiye's foreign policy positions and its own positions: in 2023, Türkiye maintained only a 10 percent alignment rate.³⁷ Türkiye's ambivalence toward Russia throughout the war against Ukraine (not implementing sanctions against Russia, while also investing in trade relations with Moscow); its geopolitical hedging (pursuing membership in the Shanghai Cooperation Organisation and the BRICS grouping); and bilateral political tensions with a range of other member states all are preventing closer cooperation with the EU.

These tensions have already had direct effects: Cyprus vetoed the EU-Türkiye agreement on the exchange of classified material—effectively vetoing participation in any European Defence Agency-led initiatives. Türkiye's formal request to participate in PESCO was denied due, in part, to Austria's objection. And Cyprus, France, and Greece objected to EU funds being used to finance Turkish-made Bayraktar drones for Ukraine and even the much-needed ammunition. Türkiye has so far been largely shut out of the EU's defense industrial efforts.

The absence of Türkiye in European defense cooperation is not new. For decades, consolidation and cooperation has taken place between Western European defense industries in France, Germany, Italy, Spain, and the UK. Except for some cooperation under the

Organisation for Joint Armament Cooperation (OCCAR) umbrella, Türkiye-Europe relations were tense after the end of the Cold War, leading Türkiye to pursue national defense industrial autonomy in order to increase its resilience against Western arms embargoes.

Today, the debate continues between those European countries looking to pursue further EU defense integration as a political objective and those looking to strengthen European defense by all means available. The latter camp is more open to Turkish participation in intergovernmental capability projects, such as the European Sky Shield Initiative coordinated by Germany, which Türkiye recently joined.³⁸ And even though the EU currently is not focused on the operational aspects of its Common Security and Defence policy, Türkiye has been a major contributor to EU-led security and defense operations in the past, and its battle-tested military would be an asset to any future European military coalition, particularly in the southern neighborhood.

Europeans face massive military manpower challenges, emptying armament and munitions stocks, a disjointed defense industrial base, and budgetary challenges that limit their capacity to rearm. Thus, Türkiye, with its thriving defense industry and robust military, could emerge as a valuable long-term EU partner.

On the geopolitical front, upheavals affecting the European continent—such as Russia’s invasion of Ukraine and the increasingly expedient structural transitions emphasized by former European Central Bank president Mario Draghi in his 2024 report on the EU economy—are opening up space for a constructive rethinking of cooperation with Türkiye.³⁹ Ultimately, these geopolitical realities, as well as the mutual aspirations of Türkiye and the EU for enhanced strategic autonomy, are increasing the relevance of a stronger Türkiye-EU partnership.

But this prospect depends on the emergence of a top-level political understanding that Türkiye-EU cooperation is fundamentally a positive sum game. And this understanding requires a reconceptualization of the operationalization of strategic autonomy. For EU policymakers, the task will be to embrace a global vision of its strategic autonomy that sees Türkiye as a strategic partner and not as a geopolitical rival like Russia or even China. For Ankara, the task will be to have a parallel discourse on its strategic thinking. In other words, the Turkish political and security establishment should also unambiguously recognize and acknowledge the value of a long-term partnership with the EU. Ultimately, as partners, both the EU and Türkiye need to demonstrate some political maturity to overcome the acrimony over Türkiye’s failed accession process. Only then can they realistically identify themselves as committed partners in an increasingly complex and unpredictable global and regional order, and at the same time, pursue their ambitions of strategic autonomy.

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This paper is part of a series of four publications in a project run by the Carnegie Endowment's Türkiye and the World Initiative, analyzing the forces at play in the Euro-Atlantic area since Russia's full-scale invasion of Ukraine on February 24, 2022. The project examines the European Union's geopolitical evolution, Türkiye's relations with Russia and China, and European and Turkish aspirations for strategic autonomy, and draws conclusions for the United States and the transatlantic partnership.



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