

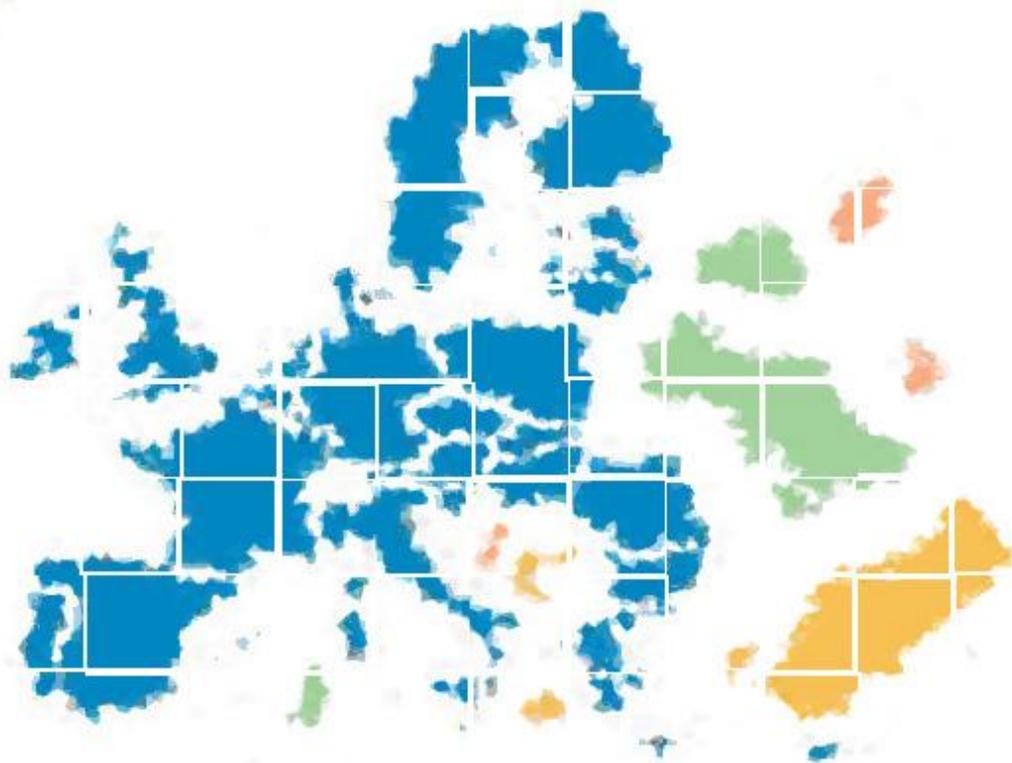
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Let's Talk Turkey

The Economic Impacts of Turkish Accession to the European Union

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Let's Talk Turkey

The Economic Impacts of Turkish Accession to the European Union

Introduction

No country's entry to the European Union (EU) has been more contested than Turkey's. Although Turkey applied for EU membership in 1987 and negotiations began in 2005, no end to the accession process appears likely within the next decade. Member State politicians and EU citizens frequently cite the supposed economic threat posed by accession as a reason to delay Turkish accession. But how much of an effect would accession have on the EU economy, given that economic integration between the EU and Turkey is already quite advanced? This essay seeks to answer this question by focusing on the likelihood of shifting trade and migration flows following Turkey's accession. This analysis will begin in the 2020s, as experts agree Turkish accession seems unlikely to occur sooner, and will consider the changes to the global trade patterns and political developments that are likely to occur before then.¹ This analysis will demonstrate that, because Turkey and the EU currently enjoy high levels of economic integration, the effects of accession on trade and migration flows will be minimal. Furthermore, the predictable growth of the Turkish economy and improvement of governmental institutions before accession will render Turkey less of an economic risk to the EU. Fears about Turkey's accession to the EU, then, are probably more directly related to perceived cultural threats of accession rather than economic concerns. This analysis will ultimately demonstrate that the economic risks that observers fear will materialize following Turkish accession are highly unlikely to occur.

Turkey-EU Relations in Historical Perspective

The history of EU-Turkey relations can be traced to 1959, when Turkey first applied to be an associate member of the European Economic Community (EEC). In 1963, the EEC signed the Ankara Agreement with Turkey, thereby paving the way for an eventual Customs Union and area of free movement of workers between the two entities. At this point, the EEC considered Turkey's economic integration to be a beneficial arrangement.² It was not until 1996 that a Customs Union between Turkey and the EU was established. This allowed for the duty-free movement of all products from

¹ Archick, *Enlargement*, 10; Philippidis and Karaca, "Economic Impacts," 1711.

² Uçak, "Population Dynamics," 180; İçduygu, "Demography," 59.

Turkey to the EU aside from agricultural goods.³ In 1999, twelve years after Turkey's application for EU membership, the EU recognized Turkey as a candidate for accession. Then, in 2005, accession negotiations officially began.⁴

Since the beginning of these negotiations, Turkey has been faulted for its numerous economic incompatibilities with the EU. De Vreese's recent studies on media framing of Turkish accession highlight that economic concerns are frequently reiterated by Member State news outlets, politicians and citizens. Media reports reference Turkey's low gross domestic product (GDP) per capita relative to the EU – one-sixth of the original EU Member States and one-half of the 2004 and 2007 accession States⁵ – as a potentially serious burden on the EU economy. In addition, low production costs in Turkey have led to fears of trade diversion from some of the poorer Eastern European states to Turkey following accession. Furthermore, the possibility of mass migration of Turkish workers to the EU in search of employment has been cited by politicians and trade union leaders as a possible threat of accession that may lower wages within the EU. De Vreese has noted that perceived economic risks are cited twice as frequently by news networks as economic benefits of Turkish accession.⁶ Negative framing of Turkish accession by politicians and media in various Member States appears to influence public opinion as well: Less than half of EU citizens participating in Kavas and Kavas's 2012 survey on public attitudes toward accession believed that Turkey's membership would benefit the EU economically, and many reiterated the same ideas presented by State media on why the Turkish economy was incompatible with that of the EU.⁷ Thus, economic integration, an issue which was presented as beneficial when the Ankara Agreement was signed in 1963, is currently portrayed as a threat now that Turkish accession has become a credible future scenario for the EU.⁸

Nevertheless, recent developments suggest that the Turkish economy may be stronger and more beneficial to the EU than is often acknowledged in public discourse. Turkey recovered from the 2008 financial crisis fairly quickly, while the effects of the crisis continue to reverberate throughout the EU. Furthermore, since the early 2000s, the Turkish GDP per capita has grown at impressive rates – some years as high as six to nine percent per annum.⁹ Indeed, this is part of an ongoing trend in the Turkish economy: between the 1980s and 2000s, Gross National Product (GNP) per capita increased fivefold from US\$1200 per capita to US\$6000. In addition, Turkey's external economic relations are particularly beneficial to the EU. Turkish soft power in the Middle East has grown in recent years partly in response to their improved political institutions and economic might.¹⁰ This has provided Turkey with more opportunities to trade with the region. Since the Middle

³ Sulamaa and Widgrén, *Membership*, 2.

⁴ Uçak, "Population Dynamics," 180.

⁵ İçduygu, "Demography," 63.

⁶ De Vreese et al., "Turkey in EU?," 87.

⁷ Kavas and Kavas, "Accession," 152; de Vreese, et al., "Framing Effects," 194–95.

⁸ İçduygu, "Demography," 59.

⁹ *Ibid.*, 63.

¹⁰ Barysch, *Can Turkey?*, 8.

East is a market that the EU continues to attempt to penetrate, Turkey's established relations with the region would be invaluable to the EU.¹¹ These considerations demonstrate that the Turkish economy is not only stronger than Member State media, politicians and society have recently suggested, but also that Turkey's economic might be strategically beneficial to the EU in the future as well.

The State of Geopolitics upon Turkish Accession

As has been mentioned above, Turkey is unlikely to enter the EU before the 2020s. Thus, any evaluation of the effects of accession should consider the state of the Turkish, EU and global economies at this time. While there is a certain level of imprecision inherent in any evaluation of future geopolitical interactions, there are nonetheless some likely developments that can be gleaned from current plans of the EU and global economic trends.

New Member States will undoubtedly have joined the EU before Turkish accession. Croatia is expected to join the EU in 2013. Iceland and Montenegro have also been predicted to become the twenty-ninth and thirtieth EU Member States.¹² Although the EU has recently resisted pressure to begin accession negotiations with Macedonia and Serbia subsequent to Croatia's accession, both have been recognized as candidate countries and may join the EU before Turkey.¹³ In addition, Albania, Kosovo and Bosnia and Herzegovina are currently recognized as potential candidates, but are not yet at a point politically or economically at which their applications for membership are likely to be successful.¹⁴ Nevertheless, the EU currently has bilateral trade agreements with both Bosnia and Herzegovina and Albania, which suggests that economic integration between these countries and the EU will have been strengthened before Turkey joins the EU regardless of whether these states enter the EU before Turkey.¹⁵ The inclusion of more Balkan states within the European Union will in itself change the face of Turkey-EU relations. As Balkan states such as Macedonia and Bosnia-Herzegovina have sizable Turkish minorities and have Turkey as one of their main trading partners, for example, the impetus to incorporate Turkey within the Union may be strengthened as a result of the inclusion of these states.¹⁶ Regardless of whether the accession of Balkan states to the EU creates a stronger sense of urgency of Turkey's incorporation within the EU, it is almost certain that it will enter as at least the thirty-first Member State.

¹¹ European Commission, *Where Are We?*, 4.

¹² Archick, *Enlargement*, 10.

¹³ EU Observer, "No EU Talks."

¹⁴ European Commission, "Enlargement."

¹⁵ European Commission, *Where Are We?*, 3–4.

¹⁶ Republic of Turkey - Ministry of Foreign Affairs, "Relations with the Balkan Region"; Simcoe, "Exports."

In addition to the changes within the EU before Turkey's accession, Turkey's economic situation will probably have improved. Primarily, political institutions will have changed before Turkish accession. Analysts have noted that there is considerable pressure on Turkey to reform its political institutions to decrease corruption and improve transparency before accession can occur.¹⁷ The most recent Commission Strategy Report stresses that this institutional reform is necessary before Turkey can join the EU.¹⁸ Thus, it seems unlikely that Turkey will be able to enter the EU without drastic institutional reform. In a 2005 study of the economic effects of Turkish EU membership, Lejour and Mooij posited that such reforms would cause investors and traders to be more willing to engage with Turkey, thus boosting to the state's GDP per capita. De Groot et al.'s 2004 study reached a similar conclusion, suggesting that greater regulation of institutions could increase Turkey's bilateral trade between 12 and 27 percent.¹⁹ Furthermore, if Turkey's GDP per capita continues to grow, wages may continue to increase while unemployment rates fall.²⁰ Turkey's economic situation is therefore likely to have improved prior to accession, especially in relation to the EU's economy.

The state of global trade relations in the 2020s is also important to consider when assessing the impact of Turkey's accession to the EU. A 2005 UNCTAD report suggested that trade with the Global South, especially with economic heavyweights China and India, will become increasingly important in the coming years.²¹ A 2012 Commission report seems to confirm this possibility, as it details the attempts of the EU to establish preferential trade agreements with ASEAN, Mercosur, various states within Central America and the African, Caribbean and Pacific countries.²² It is therefore clear that trade with the Global South will be of increasing importance when Turkey enters the EU.

The rest of this essay will detail the effects of Turkish accession on the EU, Turkish and global economies with these aforementioned developments in mind.

The Impacts of Accession on Migration

One dominant focus of discourse surrounding Turkish accession has been the question of whether an influx of Turkish migrants to the existing Member States will occur after Turkey joins the EU.²³ This concern is not new: similar fears over the possibility of the "Polish plumber" migrating to old Member States, lowering wages and increasing native unemployment

¹⁷ Tocci, *Conditionality*, 9–12.

¹⁸ European Commission, *Enlargement Strategy*, 21.

¹⁹ Lejour and de Mooij, "Turkish Delight," 101, 117.

²⁰ Uçak, "Population Dynamics," 181–82.

²¹ UNCTAD, *Trade and Development*, vii.

²² European Commission, *Where Are We?*, 2–4.

²³ Glazar and Strielkowski, "Incidence," 219.

dominated accession discourse prior to the 2004 and 2007 enlargements.²⁴ In spite of the prevalence of this concern, very few recent studies confirm this threat for Turkey's accession. While Flam's 2005 study of migration scenarios suggested that 3.5 million Turkish migrants would enter the EU by the 2020s, Lejour and Mooij's 2005 estimate suggested the number would be closer to 2.7 million within the same time frame.²⁵ In contrast, İçduygu's 2010 study suggested that the maximum number of Turkish migrants entering the EU by 2030 would be 1 million.²⁶ Glazar and Strielkowski offered an even lower prediction, suggesting that immigration has already peaked and will continue to decline until 2030, at which point the rate of Turkish migrants entering the EU-27 will be marginal.²⁷

While analysts have presented divergent figures of Turkish migrants to the EU by the time accession occurs, mass migration following accession seems unlikely to materialize. First, there is no convincing historical precedence for mass migration following accession. Guimarães correctly notes that an influx of workers from the new accession states following the 2004 and 2007 enlargements resulted in some low skill sectors favoring migrants over native workers. She cites the loss of 26,000 German jobs to Eastern European migrants following accession as an example of this phenomenon.²⁸ However, Bucevska postulates that this occurred in Germany rather than other Member States because of the lack of minimum wage in this country, which allowed German employers to find low-skilled workers who were willing to work for lower salaries than natives would have accepted.²⁹ Furthermore, as Krings notes, migrants typically left the poorest Member States in search of work.³⁰ Although Turkish GDP per capita was one-quarter of the EU Member States in 2011, this gap could conceivably narrow prior to accession – not an unreasonable prediction considering that the Turkish economy has grown consistently since June 2010³¹ – making a similar scenario in Turkey less likely. Thus, it appears that the few scenarios that suggest any loss of jobs occurred following previous enlargements were a result of other factors that are not applicable to the Turkish scenario.

In addition, the growth of the Turkish economy, which is predicted to continue prior to accession, limits the impetus of Turkish migrants to enter other Member States. Turkish immigration to the EU fell by 50.62 percent between 1997 and 2007.³² Turkish European Affairs minister Egemen Bağış posited in June 2012 that this decrease in migration was due to Turkey's

²⁴ The threat of the "Polish plumber" was popularized in France during the EU Constitution Referendum in 2005. The reference was to the threat of cheap Eastern European labour entering Western Europe as a result of new policies that would allow for greater freedom of movement and access to employment as a result of the Constitution. (See BBC News, "Polish Plumber.")

²⁵ Uçak, "Population Dynamics," 192; Lejour and de Mooij, "Turkish Delight," 115–117; Flam, "Politics and Economics of Accession," 176–78.

²⁶ İçduygu, "Demography," 67, 69.

²⁷ Glazar and Strielkowski, "Incidence," 228, 233.

²⁸ Guimarães and Faria, *Market Integration*, 26:25.

²⁹ Bucevska, "Assessing," 131.

³⁰ Krings, "Race," 51.

³¹ Trading Economics, "Turkey GDP."

³² Bucevska, "Assessing," 135.

falling unemployment levels and increasing GDP per capita.³³ If this indeed reduces the motivation of Turkish citizens to immigrate to the EU, these trends are likely to continue both prior to and following Turkey's accession to the EU: The Commission confirmed its recommendations to infuse financial aid into the Turkish economy in the future, which should strengthen the country's economy, thereby increasing GDP per capita and lowering unemployment.³⁴ In addition, as was previously mentioned, Turkey's accession negotiations would necessarily result in a change of the country's institutional structures, which should increase the flow of foreign investment into Turkey. This would continue following accession as well, as foreign investors are likely to perceive Turkey as a more stable economy upon accession.³⁵ In sum, it seems credible that Turkey's continued economic growth will reduce the incentives for Turkish migrants to enter other EU Member States following accession.

A final reason why Turkish accession is unlikely to result in high levels of migration from Turkey to the EU is because of the fact that migrants are currently able to enter the Union relatively freely. Glazar and Strielkowski posit that the EU is already "saturated" with Turkish migrants who entered in previous decades. These authors suggest that those who had the incentive and means to enter the EU have thus already done so, and that those who have not done so are not particularly likely to migrate following accession.³⁶ This situation is likely to continue before accession as well. The Commission reaffirmed their commitment to reducing the barriers to Turkish migration in their most recent Strategy Report, and visa-free travel between Turkey and the EU is scheduled to be implemented by 2015.³⁷ Thus, migration from Turkey to the EU seems likely to have taken place before accession occurs.

While the scenario of mass Turkish migration following accession seems improbable, Turkish accession may result in more Middle Eastern migrants entering Turkey. In recent years, refugees, tourists and migrant workers from the Middle East have entered Turkey as a result of the country's economic performance and reduced travel restrictions on Arab countries. Subsequent improvements of institutions and the labour market prior to accession coupled with the growth in GDP per capita that would occur prior to and following accession may make Turkey even more appealing to migrants.³⁸ Policy analyst Barysch suggests that this pressure is likely to be more visible in Turkey than other EU Member States because of the relative cultural similarity between Turkey and the Middle East.³⁹ Although this scenario seems more likely than Turkish migration to other EU Member States, this will not necessarily impact the Turkish economy negatively. Bucevska has stated that, in the 2004 and 2007 enlargements, labour migration tends to occur primarily in countries where a labour shortage

³³ Rettman, "Turks."

³⁴ European Commission, *Enlargement Strategy*, 20–21.

³⁵ Glazar and Strielkowski, "Incidence," 219.

³⁶ *Ibid.*, 222.

³⁷ Rettman, "Turks"; European Commission, *Enlargement Strategy*, 21.

³⁸ Kirişçi, "Transformation"; Gökçek, "Arabs and Turks."

³⁹ Barysch, *Can Turkey?*, 6–8.

already existed.⁴⁰ As no labour shortage has been predicted for Turkey prior to 2030,⁴¹ a massive influx of Middle Eastern seems unlikely to pose a risk to the Turkish economy.

The Impacts of Accession on Trade

In recent years, numerous reports have focused on the impact of accession on trade flows between the EU and Turkey. Some reports, such as Lejour and Mooij's 2005 study and Sulamaa and Widgrén's 2007 report, suggest that trade will benefit Turkey significantly while having only marginal benefit to the EU. Their argument is based on the fact that trade between the EU and Turkey accounts for a relatively small portion of the EU's trade: while the EU is Turkey's primary trading partner, Turkey is the EU's seventh largest import and export market. Furthermore, these studies suggest that Turkish accession could have deleterious effects on smaller Eastern European economies. This may occur because Turkey and Eastern European countries export similar products, but Turkish goods are cheaper and thus have a competitive advantage against Eastern European exports.⁴²

However, it is unlikely that the effects predicted by these studies will materialize following accession. First, most imports and exports already move between the EU and Turkey without tariffs because of the policies enforced by the Customs Union.⁴³ Thus, the balance of trade between Turkey and the EU will probably not change dramatically as a result of accession. This fact also casts doubt on the argument that Eastern European markets will founder following Turkish accession. It is true that Member States such as Romania and Bulgaria, as well as some Balkan states predicted to enter the EU before Turkish accession, specialize in the same industries as Turkey.⁴⁴ Since there is already a Customs Union between the EU and Turkey, however, Turkey's comparative advantage will affect Eastern European markets prior to accession, if it has not already done so. This is also likely for the potential new Member States as well because Turkey already has preferential trade agreements with all the potential new Member States specializing in similar exports.⁴⁵ Accession is therefore unlikely to significantly alter EU-Turkey trade patterns.

Turkey's accession to the EU will, however, alter agricultural trade flows. This is because accession to the Union will involve the removal of current tariffs on Turkish agricultural exports to the EU. According to Philippidis and Karaca, as well as Atıcı et al., Turkey's GDP per capita will only rise marginally as a result of this development: While Turkey is trade competitive in some agricultural sectors, such as sugars and vegetable oils,

⁴⁰ Bucevska, "Assessing," 140–41.

⁴¹ Uçak, "Population Dynamics," 184.

⁴² Lejour and de Mooij, "Turkish Delight," 94–95; Sulamaa and Widgrén, *Membership*, 3, 13; European Commission, "Trade."

⁴³ Sulamaa and Widgrén, *Membership*, 2.

⁴⁴ Simcoe, "Exports."

⁴⁵ Government of Turkey, "Turkish FTAs."

the EU is trade competitive with Turkey in areas such as vegetables, fruits, nuts and livestock. Thus, the reduction of tariffs will increase agricultural trade between these two countries, with exports flowing more freely in both directions.⁴⁶ Although the changes in agricultural trade between the EU and Turkey may be negligible, the fact that Turkey's agricultural market is within the EU will be particularly beneficial to both the EU and Turkey. As the European Commission has highlighted, Turkey's agricultural sector is structurally inefficient. The necessary institutional reforms that will occur before Turkey enters the EU will improve the country's agricultural output. In addition, inclusion in the EU's Common Agricultural Policy is predicted by Philippidis and Karaca to further increase GDP per capita by increasing subsidies to the large number of Turkish farmers while also diversifying the country's agricultural market.⁴⁷ Furthermore, since Turkey is already a dominant agricultural exporter to the Caucasus and the Middle East, accession will allow the EU to benefit from Turkey's penetration of these regions.⁴⁸ Accession will therefore expand both the EU's and Turkey's agricultural capabilities.

Finally, accession will create more opportunities for global trade for both the EU and Turkey. The EU aims to increase its exports to the Middle East, though its comparative lack of soft power in the region relative to Turkey has somewhat limited its success.⁴⁹ Conversely, Middle Eastern petroleum exporters have had similar difficulties penetrating EU markets. Turkey, in contrast, has extensive trade networks with both the EU and the Middle East. While trade between the Middle East and the EU currently relies on Turkey as a "bridge," where products are imported from one region and subsequently exported to the other, Saz anticipates that accession will increase the ability for these two regions to trade without Turkey acting as a mediator.⁵⁰ In addition, accession would allow Turkey to trade more freely with large regions that the EU currently maintains bilateral agreements with, such as Mercosur, ASEAN, the African, Caribbean and Pacific countries, and Central America. This is of particular importance considering that trade with the Global South is likely to increase in significance in the coming years. It thus appears that Turkish accession to the EU would strengthen the global penetration of both EU and Turkish exports, while allowing other global markets to access these two economies more easily as well.

Policy Recommendations and Conclusion

This study has so far shown that Turkish accession to the EU is not a cause for economic concern. Most of the threats suggested by state media, politicians, EU citizens and market analysts are either unlikely to occur

⁴⁶ Philippidis and Karaca, "Economic Impacts," 1718; Atıcı et al., "Agricultural Exports," 288.

⁴⁷ Philippidis and Karaca, "Economic Impacts," 1715.

⁴⁸ van Leeuwen et al., *Impacts*, iii; Grethe, "Challenge," 441.

⁴⁹ Barysch, *Can Turkey?*, 5.

⁵⁰ Saz, "Turkish Industry," 142–45.

following accession because of the high level of market integration that currently exists between Turkey and the EU, or because extensive institutional reforms which strengthen Turkey's economy will have been introduced in Turkey before accession occurs. Nevertheless, certain existing policies should be maintained to increase the likelihood of Turkish accession, and some new policies should be implemented to reduce the few threats that Turkish accession could bring.

This study has highlighted the prime importance of continued institutional reforms prior to accession. Commitments to institutional reform need to remain a priority for both Turkey and the EU. Turkish governments of the past decade have already demonstrated their commitment to improving their institutions through such measures as the Agricultural Reform Implementation Program in 2001 and the recent Central bank Reforms.⁵¹ It is essential that the Turkish government expands its reform efforts not only to increase its likelihood of entering the EU, but also to increase its GDP per capita and reduce unemployment rates. Similarly, the EU should continue to infuse funding into the Turkish economy to provide the country with the necessary external support to implement reforms. Perhaps even more importantly, the EU must continue to present the opportunity of accession as a viable possibility for Turkey. As Schimmelfennig has mentioned, countries outside the EU are more likely to conform to EU institutional standards when accession is probable.⁵² At the same time, however, the EU cannot relent in its stance on the necessity of reform prior to accession. Continued pressure on the Turkish government to improve its institutions, coupled with the EU's affirmation that accession will occur within a specific timeframe, is the most probable way to ensure that reforms will be implemented.

The EU can also implement reforms within its borders to reduce the supposed threats posed by Turkish accession. Primarily, the threat that an influx of Turkish migrants may result in higher native unemployment and lower wages could be mitigated by developing a Union-wide minimum wage policy. This is not a particularly novel idea: Schulten and Watt proposed a similar policy in a European Trade Union Institute report in 2007.⁵³ Although such a policy would be controversial, it is nevertheless a possible way to reduce the threats posed not only by Turkish accession, but also the accession of other candidate and potential candidate countries as well.

Finally, perhaps the most important challenge – and yet also the most difficult one to successfully overcome – is to reduce the level of anti-Turkish sentiment within the EU. As this study has shown, the perceived economic threats of Turkish accession are unlikely to occur. This suggests that perceived dangers posed by Turkish accession are not primarily based on real economic trends, but have their basis instead in nationalist sentiment and cultural concerns within current Member States. Thus, it is imperative that the improbability of these risks be emphasized by European politicians. Nevertheless, it is difficult to combat Turkophobic stereotypes. Even

⁵¹ van Leeuwen et al., *Impacts*, iii; Global Insight, *Turkey Monitor*, 4.

⁵² Schimmelfennig and Scholtz, "Democracy Promotion," 207, 211–12.

⁵³ Schulten and Watt, *Wage Policy*, 8.

attempting to increase dialogue between Turkish immigrants and EU citizens may not help in this endeavour. Saz's 2011 study on European Turkophobia highlighted that anti-Turkish sentiment was highest in Member States with the largest number of Turkish migrants.⁵⁴ This of course begs the question of whether responses to Turkish accession are based on an ad hoc reaction to economic trends or whether they are based on deeply entrenched ideas about Turkey's position in relation to the EU. Whether the former or the latter is the case, more attention needs to be paid by Member States specifically and EU institutions more generally to combating dangerous and inaccurate depictions of the place of Turkish immigrants in the EU. EU politicians should nevertheless attempt to highlight Turkey's recent economic growth and institutional reforms as a first step to combating negative impressions of Turkish migrants. Because De Vreese's 2010 study on media framing suggests that repeated exposure to positive images of Turkish reform can in time change public opinion, the work of EU politicians to highlight Turkey's successes may serve as a crucial first step to combating negative perceptions of the country.⁵⁵

These policy recommendations may help to alleviate the few threats posed by Turkish accession to the EU. At the time of accession, both Turkey and the EU will look remarkably different from today. It is therefore essential that Turkey continue the positive reforms it began in recent years, and that the EU continue to offer support and maintain commitment to Turkey's eventual accession.

⁵⁴ Saz, "Turkophobia," 489.

⁵⁵ De Vreese, et al, "Framing Effects," 194.

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Let's Talk Turkey: The Economic Impacts of Turkish Accession to the European Union

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Let's Talk Turkey: The Economic Impacts of Turkish Accession to the European Union

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Content

Let's Talk Turkey: The Economic Impacts of Turkish Accession to the European Union

Roisin Berghaus

EU-Ukraine Relations after the 2012 Parliamentary Elections in Ukraine: The Road to Signing the Association Agreement

Veronika Czina

Prospects of EU Enlargement: The Case of Stabilization Conditionality in Serbia

Martina Dupáková

Establishing the Rule of Law in Kosovo: The Local Ownership and International Control

Bojan Elek

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Melinda Krajczár

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