

Italian–Turkish Economic Relations: An Overview

by Sinan Ekim and Nicola Bilotta

ABSTRACT

The historically stable relationship between Italy and Turkey is experiencing a moment of uncertainty. Italy's officials and businesspeople generally support a closer partnership, but the majority of political parties as well as the Italian public are increasingly wary of engaging Turkey as long as its political problems persist. The assumption is that, lacking a re-consolidation of Turkey's democracy, not much progress is in sight. Augmenting the problem are also several foreign-policy-related issues that may put Italy and Turkey at loggerheads. The expected failure to upgrade the EU–Turkey Customs Union may be a further complicating factor, as the arrangement provides the basis for Turkish–Italian trade.

Italy's foreign policy | Turkey | External trade | FDI | European Union

keywords

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Introduction

Turkey and Italy have traditionally enjoyed strong economic relations. The increasing volume of bilateral trade as well as the number of lucrative contracts Italian and Turkish companies have signed with each other suggest that there is potential for further growth. To this end, upgrading the customs union (CU) that has regulated Turkey's economic relationship with the EU, and thereby with Italy, since 1996 is being explored as one of the most effective ways of enhancing both the EU's and Italy's economic cooperation with Turkey.

The leadership and business communities on both sides are in favour of a closer engagement with Turkey as well as a CU upgrade, while the majority of political parties and the Italian public stand in opposition. In order to be able to move forward on either dialogue in any meaningful way, Italy will foremost want to see signs of change in the political situation in Turkey, including its backsliding in democratic norms and values. Added to this, a series of foreign-policy developments, in which Ankara plays a role and largely to the detriment of Italian and European interests, have also tarnished the lustre of working with Turkey; significant progress will therefore be needed in this regard also, if Italy is to further improve the quality and value of its economic partnership with Turkey.

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1. Economic partnership

1.1 Italy–Turkey trade

Italy was the eighth largest economy in the world in 2019,¹ and the third largest in the European Union, after Germany and France. According to the World Trade Organisation, Italy was the world's ninth largest exporter in 2018, with the value of its exports reaching 547 billion US dollars. Moreover, Italy imported goods valued at 501 billion US dollars in the same year, hence becoming the 11th largest importer globally. By comparison, Turkey currently ranks as the world's 19th largest economy. In 2019, its total exports in goods and merchandise were valued at 171 billion US dollars, while it imported goods valued at 203 billion.²

Furthermore, since 2000, the value of overall trade between Italy and Turkey has been increasing. In 2000, Turkey's trade with Italy comprised 1.8 billion US dollar worth of exports and 4.3 billion of imports. By 2018, Italian exports had jumped to 9.6 billion US dollars and imports to 10.1 billion, before decreasing slightly in volume to 9.3 billion US dollars and 8.6 billion, respectively.³

The four commodities that Turkey exported to Italy in the largest volumes in 2019 were road vehicles; iron and steel; textile yarn, fabric, constructed articles and related products; and fruits and vegetables.⁴ In fact, these four merchandise groups constituted 54 per cent of Turkey's total exports to Italy. The commodities Turkey imported from Italy the same year were general industrial machinery and equipment and machine parts; road vehicles; machinery for specialised industries; and power-generating machinery and equipment, corresponding to 31 per cent of Turkey's imports from Italy.

According to the International Monetary Fund, Italy has been a top-five destination for Turkish merchandise in this decade – except for 2012 and 2017, when exports dropped to seventh and sixth place, respectively.⁵ In 2019, Italy was the fourth most popular destination for Turkish exports, ranking behind Germany, the United Kingdom and Iraq. As the chart below lays out, the volume of exports to Italy has oscillated between 4 and 8 per cent of Turkey's overall exports in the past two decades, maintaining a consistent trend (see Figure 2).⁶

¹ World Bank Data: *Gross Domestic Product 2019*, <https://databank.worldbank.org/data/download/GDP.pdf>.

² Calculations based on datasets made available by Turkish Statistical Institute (TUIK).

³ Calculations based on datasets made available by TUIK and the World Integrated Trade Solution (WITS): World Bank, *Italy Export in thousand US\$ all countries between 2000 and 2018*, <https://wits.worldbank.org/CountryProfile/en/Country/ITA/StartYear/2000/EndYear/2018/TradeFlow/Export/Partner/BY-COUNTRY/Indicator/XPRT-TRD-VL>.

⁴ Calculations based on datasets made available by TUIK, using the SITC Rev.4 classification system.

⁵ See the interactive table on the IMF website: *Direction of Trade Statistics - Charts by Country*, and select Turkey as the exporting country, <https://data.imf.org/?sk=9D6028D4-F14A-464C-A2F2-59B2CD424B85>.

⁶ Calculations based on datasets made available by TUIK.

From an Italian perspective, Turkey has not been a top-10 trading partner in the last decade. Last year, it ranked as Italy's 12th largest export partner worldwide. Nevertheless, Turkey was still the fifth largest market for Italian products outside the EU, after China, the United States, Switzerland and the United Kingdom. Italy's exports to Turkey (or Turkey's imports from Italy) have furthermore ebbed and flowed since 2000. While they were valued at 13.5 billion US dollars in 2011, their value sank to 8.6 billion in 2019, hitting their lowest point since 2009 (see Figure 3).⁷ According to a report published by the Turkish Exporters Assembly (TIM), Turkey exported 4,729 differently coded products in 2018 – worth 168 billion US dollar.⁸ Italy imported 5,255 differently coded products in the same year, valued at 501 billion US dollars (499 billion, according to TIM's report). Out of these more than 5,000 different products that Italy imported, Turkey does not export 550 of them at all. Yet, Italy spends over 59 billion US dollars on these imports (which include raw petroleum and natural gas). By contrast, Italy imported 2,729 differently coded products from Turkey. The overall import of these 2,729 products (i.e., not just their import from Turkey) cost Italy 372.9 billion US dollars. Since Turkey's exports to Italy are valued at only 10.6 billion – a mere fraction of 372.9 billion US dollars – Italy clearly imports the same products from other countries.

Two points of clarification should be raised at this juncture, the first of which relates to the assertion made above regarding the strength of Italian–Turkish trade relations. While the monetary value of Turkish exports did increase over the past two decades, the value of exports to Italy as percentage of Turkey's total exports decreased. Although this value never decreased below 4 per cent, it still brings up the question of whether this could be interpreted as the loss of relative significance of Italian markets for Turkey's economy. Factoring in the fact that Italy still remained a top-five market while receiving a smaller share of Turkey's exports, one could also argue that Turkey's economy has become skewed towards its top three markets, namely Germany, the UK and Iraq.

However, analysing export figures on a country-by-country basis reveals a different conclusion. For example, Turkey exported 16 billion and 11 billion US dollar worth of goods and merchandise last year to Germany and the UK respectively, its two leading export partners. These amounted to 11 per cent and 6 per cent of Turkey's overall exports against the 5.47 per cent Italy received. While this is a noticeable difference, the difference is not wide enough to argue that the Turkish economy is being skewed towards certain markets. Instead, it makes more sense to see this percentage decrease in exports to Italy as a result of Turkey starting to export to a higher number of countries throughout the past two decades. The increase in the number of trading partners has therefore led to a decrease in the percentage of overall exports to a specific country, despite the fact that the overall volume of

⁷ Calculations based on datasets made available by TUIK.

⁸ TIM, *İtalya Hedef Pazar Ülke Analizi* [Italy Target Market Country Analysis], 5 September 2019, https://www.tim.org.tr/files/downloads/Analiz_Rapor/İtalya%20Hedef%20Pazar%20Ülke%20Analizi.pdf.

exports continued to grow.⁹

Figure 1 | Turkish exports to Italy (million US dollars)

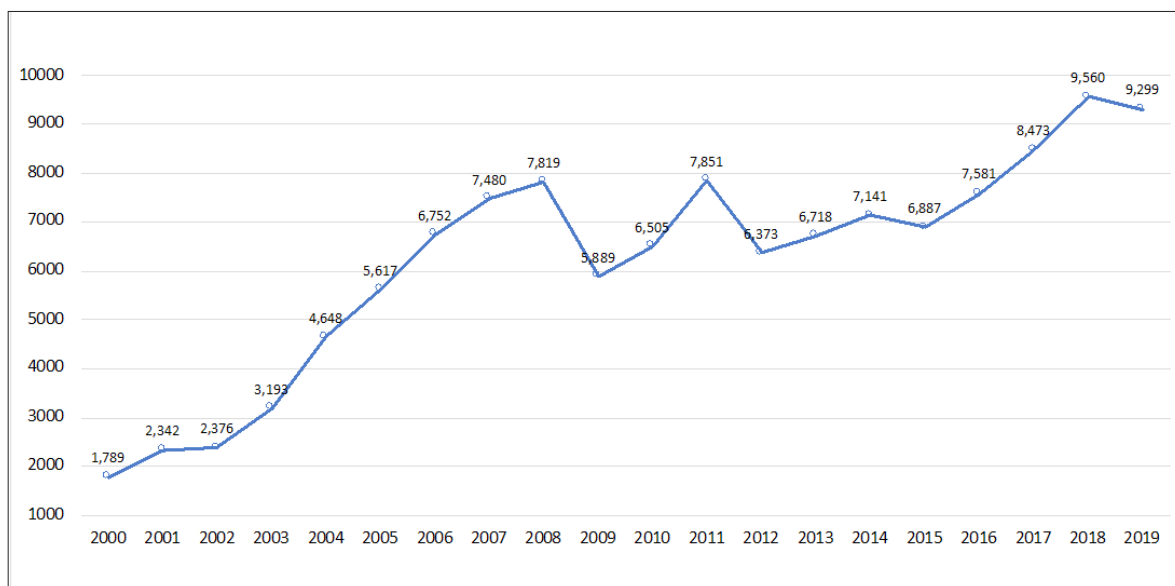
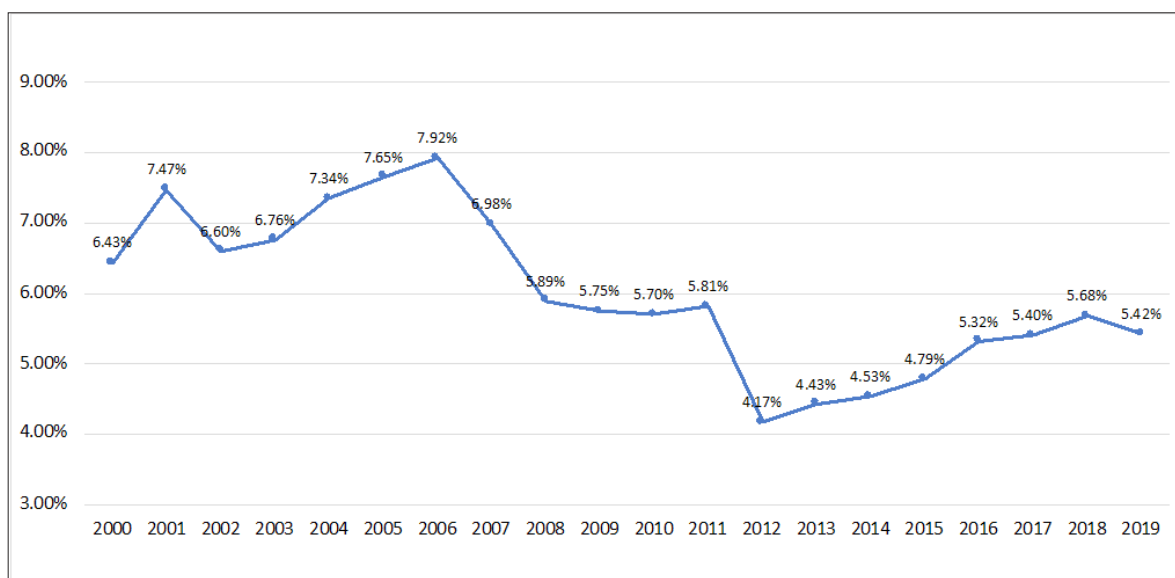


Figure 2 | Exports to Italy as a percentage of overall exports (million US dollars)

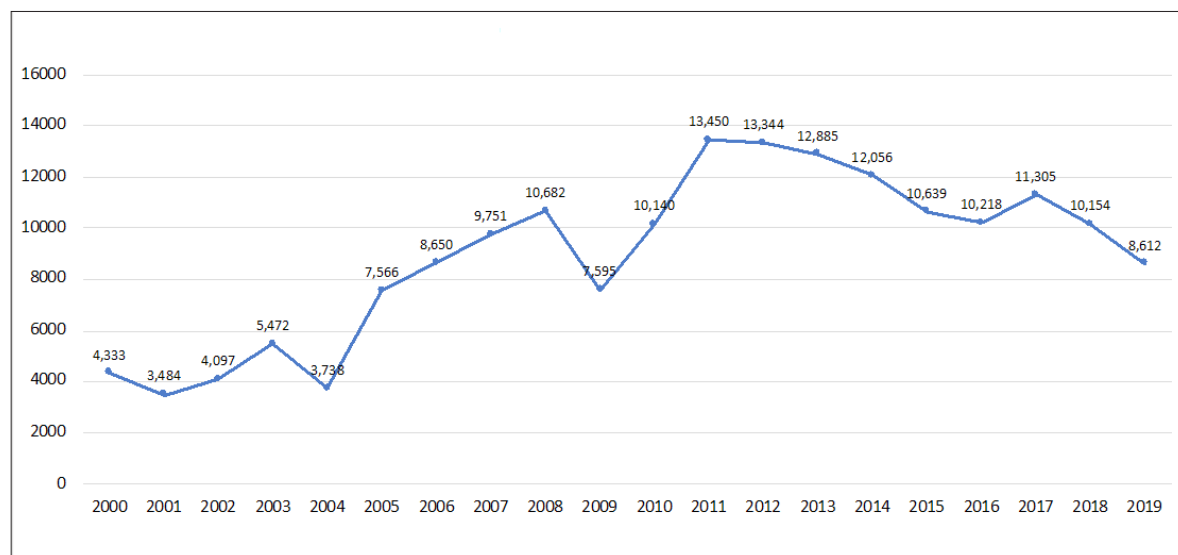


The second point revolves around how Turkey does not offer any goods or merchandise that Italy cannot already acquire from elsewhere. There is an element of truth to this, but what makes the bilateral trade relationship strong for both sides is its consistent and balanced nature. Indeed, trade officials on both sides point to the relatively narrow gap between export and import values, which has been a

⁹ Calculations based on datasets made available by TUIK.

consistent trend for much of the past two decades.

Figure 3 | Turkish imports from Italy (million US dollars)



Overall, Turkish–Italian relations are already strong. Yet, they could be stronger. One way of achieving this is by addressing the structural deficiencies of the CU that governs a significant part of Turkey’s economic relations with the EU and its Member States. Simply put, this CU has made Turkey an integral part of the EU’s internal market of goods, allowing Turkish manufactured products to be traded in the EU without any tariffs or quotas. It was also meant to align Turkey’s economy with the EU’s regulatory standards, as Turkey was supposed to transition from being an EU neighbour to an EU candidate and finally a fully fledged EU member. Given that almost 25 years have passed and Turkey’s membership prospect has faded, this CU now needs to be updated to a format that is more befitting the realities of the current global economic landscape. Several studies have put forward that modernising this arrangement would result in significant benefits for all sides. Some assessments project that the EU would gain 5.4 billion euro or about 0.01 percent of GDP, and Turkey would gain 12.5 billion euro or about 1.44 per cent of GDP.¹⁰ Another assessment puts the increase in Turkish GDP at 2.5 per cent, along with 95 per cent increase in agricultural exports to the EU and up to 430 per cent increase in the country’s services exports.¹¹ Correlatively, a more prosperous EU–Turkey trade would also mean a more prosperous Italy–Turkey trade.

¹⁰ European Commission, *Impact Assessment Accompanying the Document Recommendation for a Council Decision Authorising the Opening of Negotiations with Turkey on an Agreement on the Extension of the Scope of the Bilateral Preferential Trade Relationship and on the Modernisation of the Customs Union* (SWD/2016/475), 21 December 2016, <http://trade.ec.europa.eu/doclib/html/155238.htm>.

¹¹ Kemal Kirişci and Onur Bülbül, “The EU and Turkey Need Each Other. Could Upgrading the Customs Union Be the Key?”, in *Order from Chaos*, 29 August 2017, <http://brook.gs/2gnb4ZW>.

1.2 Foreign direct investment

Italy is not a leading investor in Turkey. Italian foreign direct investment (FDI) made up only 2.3 per cent of total FDI Turkey received in 2019. Since 2000, in fact, FDI from Italy has not accounted for more than 5 per cent of Turkey’s overall FDI intake; the only exceptions were 2003 and 2005, when Italian direct investment went up to 5.4 per cent and 5.6 per cent of total FDIs in Turkey. Italian investments have mainly focused on food, clothing, chemicals, electric and electronic supplies, machinery, furniture, and iron-steel and vehicle industries.

Figure 4 | Italian foreign direct investment in Turkey (million US dollars)

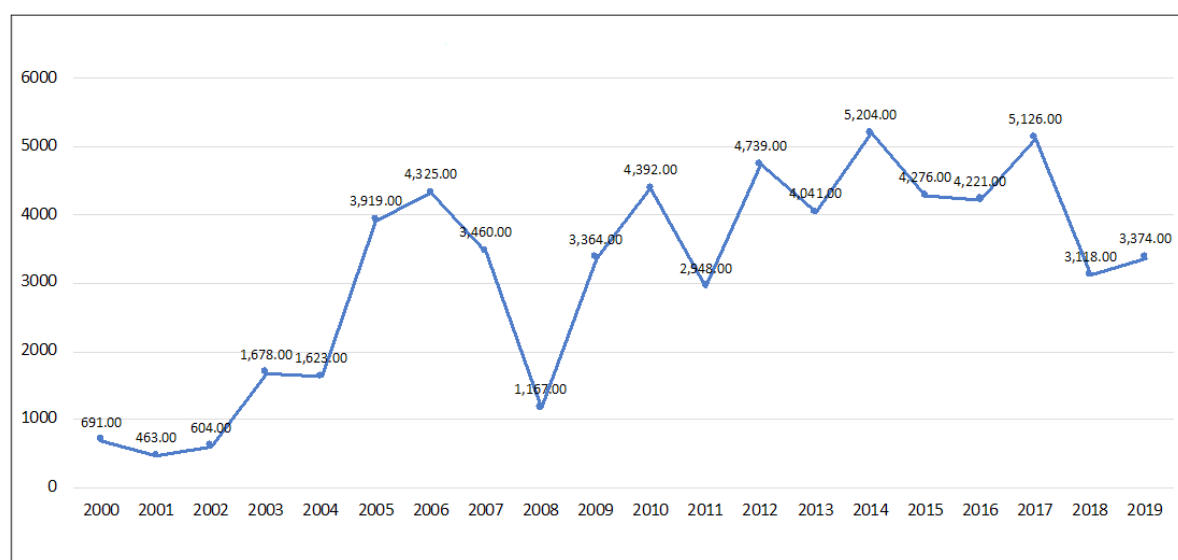
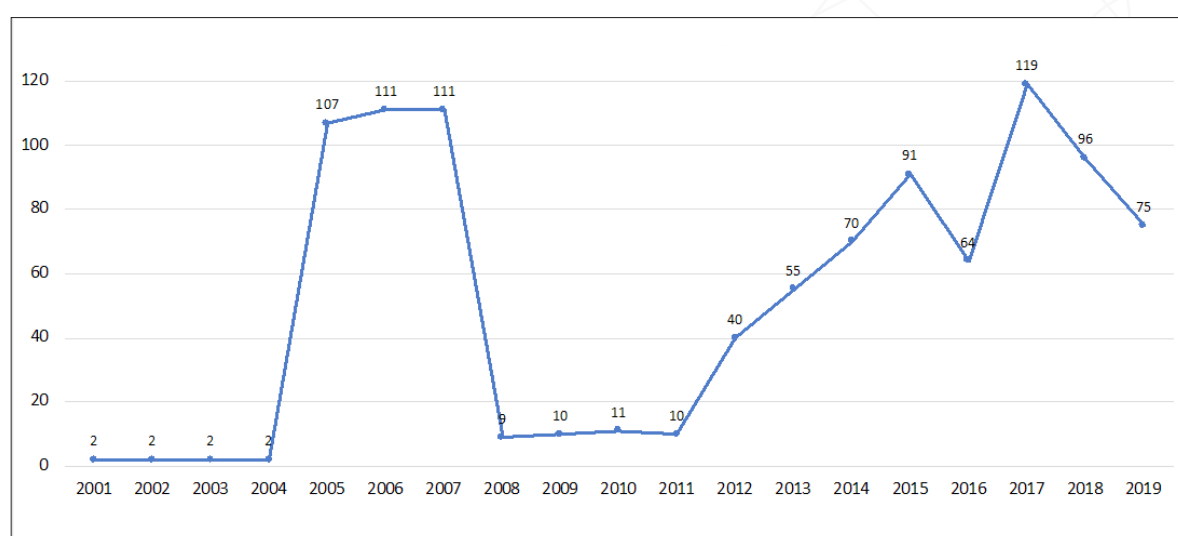


Figure 5 | Turkish foreign direct investment in Italy (million US dollars)



Italy is even less popular as a destination for Turkish FDI, with only 0.18 per cent of FDI out of Turkey being invested in the country in 2019. This latest number is consistent with more than a decade of negligible investments made by Turkish entities in Italy; Turkish FDI in Italy went above 1 per cent of its overall FDI only twice – in 2005 and 2006 – in the past two decades, with 1.29 per cent and 1.25 per cent of total FDI being invested in Italy in those years.

1.3 Tourism

The Italian consulate in Istanbul issued the fifth highest number of Schengen visas of all Italian missions worldwide in 2018, after the Italian missions in Moscow, Beijing, Shanghai and Guangzhou.¹² Furthermore, the Italian consulate in Istanbul had the third highest number of visa applications lodged across all missions in Turkey that issue Schengen visas, after the German and French consulates in Istanbul.¹³ In purely numerical terms, Italy does not appear to be a popular travel destination for Turkish travellers, with 220,000 out of 9.9 million travellers (2.2 per cent of all Turkish travellers) selecting Italy as their holiday spot in 2019. However, these numbers should be read as the result of the strengthening euro against an increasingly weaker lira that has made European travel financially less feasible, and the fact that travellers to Italy are holiday-travellers and not on family visits, as is often the case with more “popular” European destinations like Bulgaria and Germany.¹⁴ Italians visiting Turkey are also noticeably fewer than those from other countries. Out of the 45 million foreign visitors to Turkey in 2019,¹⁵ only 377,000 were Italian nationals, corresponding to just 0.84 per cent of overall travellers to Turkey.

1.4 Italian companies in Turkey

Italy has been investing in Turkey since the 1960s, when KOÇ Holding established Tofaş in partnership with Italy’s Fiat Group.¹⁶ Today the Turkish companies with Italian partners, and Italian companies that maintain a presence in the country, number more than a thousand and are spread across various sectors. The list is extensive, but to name a few: agriculture (Barilla, Ferrero), banking (Banca Intesa, Banca Generali, Banca di Roma, UniCredit, Yapı Kredi), communication (Telecom Italia Mobile), defence (Leonardo), electronics (Omron Electronics), infrastructure

¹² European Commission Migration and Home Affairs website: “Visa Statistics for Consulates, 2019”, under *Complete Statistics on Short-Stay Visas by the Schengen States*, https://ec.europa.eu/home-affairs/what-we-do/policies/borders-and-visas/visa-policy_en#stats.

¹³ Ibid.

¹⁴ TUIK, *Citizens Visiting Abroad by Destination Countries, 2003-2019*, http://www.turkstat.gov.tr/PreIstatistikTablo.do?istab_id=1611.

¹⁵ Turkish Ministry of Culture and Tourism - Directorate-General of Investments and Enterprises, *2019 Yılı Genel Turizm İstatistikleri* [General Tourism Statistics for 2019], February 2020, p. 2, <https://yigm.ktb.gov.tr/Eklenti/69320,turizmistatistikleri2019-4pdf.pdf?0>.

¹⁶ Although Italian presence in Turkey dates back several centuries, the report will not focus on the history of relations during the Ottoman Empire.

(Astaldi, Caltagirone, Trevi), fashion (Ermenegildo Zegna), furniture and appliances (Chicco, De Longhi, Merloni, Scavolini, Veneta Cucine), pharmaceuticals (Menarini International) and the transportation and automotive industry (Iveco, Fiat, Magneti Marelli, Pirelli).¹⁷

There are many examples of collaboration between Italian and Turkish companies. Perhaps most importantly, the Turkish government has entrusted Italian companies with realising its mega-projects. For instance, Pininfarina has designed the Traffic Control Tower at Istanbul's new airport¹⁸ as well as Turkey's "first indigenously manufactured automobile".¹⁹ In addition, the Astaldi Group was part of the consortium that handled the construction of Istanbul's third bridge across the Bosphorus, the "Yavuz Sultan Selim" bridge. Astaldi has a history of undersigning lucrative contracts in Turkey, having also built the 116-km section of the Anatolian motorway between Gümüşova and Gerede as well as a section of the Istanbul metro system,²⁰ and invested 100 million euro in the Milas-Bodrum Airport.²¹

Collaborations also include smaller but still significant ventures. One such example is the agreement the Italian export credit agency SACE and the Turkish Eximbank signed in February 2017, which will have them jointly support companies on a global scale.²² Furthermore, the Şişecam Group invested 198 million US dollars in its second production facility in Italy's Puglia region in December 2019, the opening of which was attended by Prime Minister Giuseppe Conte.²³ In another example of cooperation, the Ionian Sea Port Authority reached an agreement with the Turkish port-operating company Yilport in December 2019, according to which Yilport will be investing 400 million euro for renovating the Port of Taranto and will be in charge of the port's management for 49 years.²⁴ Also noteworthy have been the funds extended by the Italian Trade Agency to help restore the Seyh

¹⁷ Valeria Giannotta, "The Extent of Italy-Turkey Partnership", in *Daily Sabah*, 30 January 2019, <http://sabahdai.ly/w9gt1N>; Turkish Ministry of Trade, *İtalya Ülke Profili* [Italy Country Profile], 2020, p. 12, <https://ticaret.gov.tr/data/5efc842913b876f898f3c36d/%C4%B0TALYA-%C3%9Cİke%20Profili.pdf>.

¹⁸ Karissa Rosenfield, "AECOM and Pininfarina Selected to Design Istanbul New Airport's Traffic Control Tower", in *ArchDaily*, 24 December 2015, <https://www.archdaily.com/779422>.

¹⁹ "First 'Made-in-Turkey' Car Designed by Famed Italian Car Designer Pininfarina", in *Daily Sabah*, 11 December 2019, <http://sabahdai.ly/zw4bal>.

²⁰ Astaldi, *Astaldi, Third Bosphorus Bridge Completed*, 7 March 2016, <https://www.astaldi.com/en/node/332>.

²¹ Astaldi, *Astaldi Enters the Airport Concessions Sector in Turkey*, 28 April 2011, <https://www.astaldi.com/en/node/860>.

²² Valeria Giannotta, "Building Turkey-Italy Partnership Based on Mutual Interests", in *Daily Sabah*, 6 August 2019, <http://sabahdai.ly/hhzn66>.

²³ "Şişecam İtalya'daki ikinci üretim tesisini açtı" [Şişecam opened its second production facility in Italy], in *Hürriyet*, 1 December 2019, <https://www.hurriyet.com.tr/ekonomi/sisecam-italyadaki-ikinci-uretim-tesisini-acti-41386686>.

²⁴ "Yilport Holding Signs 49-Year Concession for Port of Taranto", in *Hellenic Shipping News*, 2 August 2019, <https://www.hellenicshippingnews.com/yilport-holding-signs-49-year-concession-for-port-of-taranto>. For more information on Yilport's investments in Taranto port and its development programme, see Michaël Tanchum, "Italy and Turkey's Europe-to-Africa Commercial Corridor", in *AIES Fokus*, No. 10/2020 (25 August 2020), p. 3, <https://www.aies.at/publikationen/2020/fokus-20-10.php>.

Suleiman Mescidi Mosque in Istanbul; as well as the collaboration between Turkish Aerospace Industries Cooperation and the Italian Leonardo in producing ATAK helicopters and Göktürk satellites.

2. Positions of different actors on relations with Turkey

2.1 Government level

The attitude at the government level is supportive of a closer engagement of and sustaining robust ties with Turkey. There have been a series of notable meetings in the past five years. In February 2017, then Italian Minister for Economic Cooperation Carlo Calenda and his Turkish counterpart Nihat Zeybekçi hosted in Istanbul the first meeting of the Joint Economic and Trade Commission to discuss how to increase investments, eliminate obstacles to trade as well as revamp ongoing collaborations in the fields of science, technology, culture and tourism.²⁵ Another example is President Recep Tayyip Erdoğan's meeting with Italian businessmen at an executive roundtable in Rome in February 2018 – organised by the Investment Support and Partnership Agency of Turkey (ISPAT), the Pirelli Group and the Institute for International Political Studies (ISPI) – during Erdoğan's first official trip to the Vatican City.²⁶ Furthermore, the Italian Minister of Economy and Finance Giovanni Tria had a meeting with his Turkish counterpart Berat Albayrak and the CEOs of leading Turkish industrial groups on 22 July 2019, when the two sides announced that they have agreed to strengthen economic cooperation.²⁷

More recently Italy's ambassador to Ankara, Massimo Gaiani, stated that PM Conte had tasked him with increasing the trade volume from around 20 billion US dollars to 30 billion.²⁸ At a forum organised by the Italian Chamber of Commerce in Istanbul, Gaiani furthermore emphasised that Turkey could connect Italy with the markets in its immediate neighbourhood and act as a bridge to Asia, Africa and the Middle East – which increased Turkey's importance as a trading partner above that of Russia, Brazil and China.²⁹ It is important to note that these meetings have not officially focused on upgrading the EU–Turkey Customs Union, as this would be a

²⁵ Italian Ministry of Foreign Affairs and International Cooperation, *Turkey - Istanbul Hosts First JETCO Meeting*, 24 February 2017, https://www.esteri.it/mae/en/sala_stampa/archivionotizie/approfondimenti/2017/02/turchia-a-istanbul-prima-riunione.html.

²⁶ Turkish Presidency-Investment Office, *President Erdoğan Meets Italian Investors, Calls For More Investment*, 7 February 2018, <https://www.invest.gov.tr/en/news/news-from-turkey/pages/president-erdogan-meets-italian-investors-calls-for-more-investment.aspx>.

²⁷ Handan Güneş and Enes Duran, "Bakan Albayrak ile İtalya Ekonomi ve Maliye Bakanı Tria bir araya geldi" [Minister Albayrak and Italian Economy and Finance Minister Tria met], in *Anadolu Agency*, 22 July 2019, <http://v.aa.com.tr/1538518>.

²⁸ Ergin Garip, "İtalya, Türkiye'yle ticaret hacmini 30 milyar dolara çıkarmada kararlı" [Italy, Turkey trade volume to 30 billion dollars], in *Anadolu Agency*, 15 December 2019, <http://v.aa.com.tr/1674180>.

²⁹ "İtalyanlardan Türkiye ekonomisi değerlendirmesi", in *Sözcü*, 28 November 2019, <https://www.sozcu.com.tr/2019/ekonomi/italyanlardan-turkiye-ekonomisi-degerlendirmesi-5478932>.

discussion for the EU as a whole. However, officials have remarked that Italy is an advocate for modernising the agreement and that these frequent interactions at the top levels of government should be taken as an indication of this stance.

Despite this rosy picture, officials do flag out several irritants. For one, Turkey has been increasing the number of trade barriers against goods coming in from the EU since at least 2010. Although trade officials do not describe these as fundamental problems, they nonetheless see them as a violation of the CU. One such irritant is the requirement for European exporters to present a certificate of origin. The CU stipulates that once a product is placed in the EU market, it enjoys free movement across the CU regardless of its origin. This, they claim, puts the request for a certificate of origin out of line with CU rules. Another is the unclear chain of command after Turkey's shift to a system of executive presidency following the 2018 constitutional referendum. Officials note that the onset of this new system has diluted the responsibilities of ministries, making it more difficult to identify the right counterpart and establish a line of communication. Even then, they resent that Turkish officials shy away from taking decisions, since ministries are no longer tasked with creating policy, but rather executing presidential orders.

Still, this frustration is not seen as a factor that could halt cooperation. As things stand now, the leadership is likely to continue advocating deepening economic relations with Turkey and would remain onboard a CU upgrade. Added to this, officials are confident that Italy and Turkey will not be looking at a completely different picture even if CU negotiations never materialise or ultimately fail. Of course, this will prevent the sides from reaping the benefits of a more robust framework of cooperation, but bilateral trade and economic relations will nonetheless remain strong, as they are now.

2.2 Political parties

The rise of right-wing parties has caused Italy's political establishment to project an increasingly critical view on Turkey. In February 2019, an Italian government document endorsing Turkey's status as a candidate for EU membership was rejected by key figures in the right-wing League party. League Matteo Salvini had declared in 2013 that "Turkey is not and will never be Europe", while Guglielmo Picchi, who was undersecretary of state at the foreign ministry in 2018–19, reaffirmed his party's opposition to Turkey's EU membership.³⁰ The League believes that Turkish society, however secular on paper, subscribes to an Islamic culture incompatible with Europe's Christian values.

Left-wing parties place a large premium on Europe demonstrating its identity as a multi-ethnic and multi-religious polity.³¹ As a result, they problematise Turkey's

³⁰ Jacopo Barigazzi, "Italy's Turkey Policy Rejected...by Italy", in *Politico*, 28 February 2019, <https://www.politico.eu/article/turkey-european-union-member-italy-turkey-policy-rejected>.

³¹ *Ibid.*

questionable treatment of its ethnic minorities and what they describe as an unacceptable human rights record. They argue that Turkey's membership would consolidate a "Europe of 'markets and capital'", and would go against the spirit of the EU as a political and social union.³² That said, these parties have added that, should Turkey align itself with EU values, they would also be more sympathetic to a closer engagement.

By contrast, centre-left and centre-right parties support the deepening of relations.³³ Turkey's Mediterranean identity is seen as ammunition for Italy's desire to pull the EU's centre of gravity to the south.³⁴ They also argue that Turkey's inclusion would make sense both politically and commercially, demonstrating that the EU is an open political project and securing an attractive market for trade and investment.

2.3 Business communities, including trade unions and chambers of commerce

Italian business communities have toed a line similar to that of the government. In a recent survey of 80 Italian companies in Turkey by the Centre for International Politics Studies (CESPI), 90 per cent of Italian companies operating in Turkey said that they were happy with their investments.³⁵ According to the survey, 87 per cent of them would recommend investing in Turkey, 85 per cent see Turkey as a safe business environment and 80 per cent identify Turkey's geopolitical location as a positive factor for investment. Indeed, according to Italian businessmen, culture is the reason why Italians and Turks often work well together. Many have remarked that they feel at home in Turkey, asserting that structures and processes create a familiar operating field.³⁶

Luca Cordero di Montezemolo, former president of Confindustria, had previously claimed that, from a business standpoint, "Turkey is already in Europe".³⁷ In a similar vein, the head of the Italian Chamber of Commerce in Istanbul, Livio Manzini, pledged his support to the CU's modernisation in December 2019.³⁸ In fact, most Italian businesses and trade unions are in favour of a CU upgrade,

³² Emiliano Alessandri and Sebastiano Sali, "Italian Perceptions", in Sait Akşit, Özgehan Şenyuva and Çiğdem Üstün (eds), *Turkey Watch: EU Member States' Perceptions*, Ankara, Center for European Studies-Middle East Technical University, November 2009, p. 47, http://ces.metu.edu.tr/system/files/turkey_watch_en.pdf.

³³ *Ibid.*, p. 46.

³⁴ Carl Bildt and Massimo D'Alema, "It's Time for a Fresh Effort", in *The New York Times*, 31 August 2007, <https://www.esteri.it/mae/tiny/7305>.

³⁵ "9 out of 10 Italian Firms Happy to Invest in Turkey, Survey Shows", in *Daily Sabah*, 21 January 2020, <https://www.dailysabah.com/economy/2020/01/21/9-out-of-10-italian-firms-happy-to-invest-in-turkey-survey-shows>.

³⁶ Based on the author's interview with several Italian businessmen living in Istanbul and Ankara, who asked not to be named.

³⁷ Emiliano Alessandri and Sebastiano Sali, "Italian Perceptions", *cit.*, p. 51.

³⁸ Ergin Garip, "Right Time to Invest in Turkey: Italian Business Leader", in *Anadolu Agency*, 4 December 2019, <http://v.aa.com.tr/1663791>.

as it could standardise regulations for Italian-owned companies that operate in banking, energy and infrastructure sectors, such as Unicredit and Telecom, and facilitate the free movement of workers in the services sector³⁹ – both of which would work to the benefit of Italian companies in Turkey.”

Maintaining a working *modus operandi* with Turkey is furthermore part of Rome’s “rebalancing” towards the Mediterranean basin and Africa.⁴⁰ Italy shares common economic interests with Turkey especially across North Africa, where both countries have been expanding their political and economic presence. As much as a strategic decision, this re-orientation towards the wider Mediterranean region is also the result of a certain EU fatigue, where Rome’s voice has been carrying increasingly less weight. Of course, Italy’s operations still take place within the framework of its commitments to the EU and Italy is not looking at the Mediterranean and its cooperation with Turkey as an alternative to the EU. That said, the coming years will see a sharp increase in Italian operations (as well as cooperation with Turkey) along the Mediterranean. This may channel some of the investment, capital and labour – normally devoted to the EU – towards North Africa and the Central Mediterranean, where Turkey will likely emerge as a partner.

Some worries persist, however. Advocating closer relations runs the risk of exposing businesses and unions to anti-immigration rhetoric, for example. Agricultural firms are also concerned that a CU arrangement that includes agricultural products⁴¹ would result in an influx of cheaper products, harming Italian farmers.⁴² Coldiretti, representing Italy’s agricultural entrepreneurs, has stated that Turkish products could introduce a range of health risks.⁴³ There are significant frustrations with Turkey’s business culture, too. A company needs proper planning and a well-structured investment plan – which, in return, requires time. But time often is a commodity that Turks are unwilling to invest in, some Italian businessmen contend. In fact, many seem constantly worried that EU–Turkey or Italy–Turkey relations could take a turn for the worse and that they would almost certainly not be protected by Turkish authorities. This prevents their partnership from maturing organically and limits what the companies could achieve together, these businesspeople complain.⁴⁴

Such nuisances are not deal-breakers, though, as Italian businesspeople are generally confident that the merits of retaining Turkey as a partner outweigh its demerits.

³⁹ European Commission, *Impact Assessment Accompanying the Document Recommendation...*, cit.

⁴⁰ For an excellent discussion on Italian activism along the Mediterranean, see Michaël Tanchum, “Italy and Turkey’s Europe-to-Africa Commercial Corridor”, cit.

⁴¹ European Commission, *Impact Assessment Accompanying the Document Recommendation...*, cit.

⁴² Emiliano Alessandri and Sebastiano Sali, “Italian Perceptions”, cit., p. 52.

⁴³ Coldiretti, *Turchia invade Ue con cibi pericolosi, no adesione*, 14 October 2019, <https://www.coldiretti.it/?p=84265>.

⁴⁴ Based on the author’s interview with several Italian businessmen living in Istanbul and Ankara, who asked not to be named.

2.4 The Italian public

The Italian public has an overwhelmingly negative perception of Turkey. One reason is that, as revealed by surveys, most Italians feel “threatened” by different cultures.⁴⁵ Many see being Christian as a definitive marker of being European, and in return, believe that European borders should not encompass a Muslim country. It is particularly this linkage with Islam that renders engagement with Turkey undesirable to the Italian public, as Islam and Turkey both suffer from an alarmist and ill-informed representation in the press.⁴⁶ The rise of Islamophobia after the migration crisis of 2015 has further tainted the perception of Turkey; as a result, the political issue of Turkey’s bid for EU membership has become connected to a cultural dynamic, in which Turkey is identified as a Muslim and hence an un-European country.

Turkey’s recent foreign policy manoeuvres have also tarnished the lustre of any closer engagement with Turkey, as they have reaffirmed in the eyes of the Italian public Turkey’s disregard for democratic practices and human rights. An SWG public opinion poll published in autumn 2019 revealed that the Italian public were alarmed by the policies against Turkey’s Kurdish communities as well as Turkey’s incursion into northern Syria.⁴⁷ Sixty-two per cent of Italian citizens considered this incursion a mistake, claiming that Kurds “are not terrorists” and the Turkish attack is “immoral”, with more than half of the voters of the League and the 5 Star Movement and almost all of those of the Democratic Party agreeing that Italy must prevent further Turkey’s operations in Syria. Furthermore, Turkey’s latest actions in the eastern Mediterranean will have blemished Turkey’s image, as the majority of Italians view Turkey’s actions in the region as symptomatic of those of an authoritarian state. The crisis is still brewing, and unless the sides can find a way to navigate out of the storm, it will likely keep chipping away at Turkey’s reputation.

The modernisation of the EU–Turkey Customs Union is still a technical issue and is seen first and foremost as a trade agreement, and therefore does not come up in public discussions on EU–Turkey relations. Nevertheless, its reach extends far beyond the economic sphere: this could be “packaged” as a solution to some of public’s concern vis-à-vis Turkey. The reforms that will be implemented as part of the upgrade process would extend the rule of law, first, into the economic sphere by, for example, necessitating the creation of a legal regulatory framework that

⁴⁵ Andrea Pitasi, Michela Marchionni and Maria Francesca Massoni, “Italian Multiple Identities: The Italian Perception of National and European Belonging”, in Richard Robyn (ed.), *The Changing Face of European Identity*, London/New York, Routledge, 2005, p. 145.

⁴⁶ Margherita Marcellini and Özgehan Şenyuva, “Turkey in Italian Media: Between Islam and Europe”, in *Perceptions*, Vol. 16, No. 1 (Spring 2011), p. 21-45, http://sam.gov.tr/pdf/perceptions/Volume-XVI/spring-2011/margherita_marcellini_ozgehan_senyuva.pdf.

⁴⁷ SWG, *La Turchia e i Curdi*, 22 October 2019, <https://www.swg.it/politicapp?id=mzjn>.

can operate without any undue government meddling⁴⁸ and thereby giving the EU some leverage on issues such as labour laws, human rights and dispute settlement. By prodding Turkey to implement democratising reforms in one area – economy – the CU would function as something “more than a framework for advancing economic integration”⁴⁹ and could start the process of channelling the relationship back into a rules-based framework. To increase public interest in the CU and start building up public support, the government and political parties could stress these non-economic aspects of the CU upgrade that hold the potential of setting Turkey towards a more democratic path.

2.5 Other political concerns that shape Italy's posture vis-à-vis Turkey

The CU negotiations will not develop in isolation. Both sides are likely to pull into the discussion matters that are not immediately connected to the CU. The pressing issues at the moment are the Libyan conflict that has become connected to the evolving crisis in the eastern Mediterranean, and migration.

Italy and Turkey both support the Government of National Accord (GNA) led by Fayez al-Sarraj in Tripoli against the leader of the Libyan National Army General Khalifa Haftar, who is supported by Russia, France, the United Arab Emirates, Egypt and Jordan. Due to a lack of coherent policymaking, the internal crises within the government, as well as the fear of having to deal with another wave of migration, Italy had initially resigned itself to a backseat.⁵⁰ This pushed the GNA into a closer partnership with Turkey. For example, whereas the GNA was unable to secure any military assistance from Italy, Turkey was keen to sign a deal in December 2019 that provided Tripoli with military training and weapons. In return, the sides also concluded a memorandum of understanding (MoU) that promises Turkey greater access to the oil and gas resources off the Libyan coast.⁵¹ In response, Italy's Foreign Minister Luigi Di Maio stated that the MoU violated international law and could not have any legal weight on other countries.⁵² Indeed, these developments are a threat to Italy's long-term interests in Libya and the region.

Most importantly, the current situation complicates Italy's energy interests. Jointly with Libya's National Oil Corporation (NOC) and Mellitah Oil & Gas, Italy's ENI drills for oil and natural gas in Libya, which are then transported to Sicily via the

⁴⁸ Beken Saatçioğlu et al., “The Future of EU-Turkey Relations: A Dynamic Association Framework amidst Conflictual Cooperation”, in *FEUTURE Papers*, March 2019, p. 24, <https://feuture.uni-koeln.de/en/publications/feuture-synthesis-paper>.

⁴⁹ Sinan Ülgen, “Trade as Turkey's EU Anchor”, in *Carnegie Papers*, December 2017, p. 18, <https://carnegieeurope.eu/publications/75002>.

⁵⁰ Mattia Giampaolo, “How Italy Was Marginalised in Libya”, in *ECFR Commentaries*, 17 January 2020, https://www.ecfr.eu/article/commentary_how_italy_was_marginalised_in_libya.

⁵¹ Carlotta Gall, “Turkey, Flexing Its Muscles, Will Send Troops to Libya”, in *The New York Times*, 2 January 2020, <https://www.nytimes.com/2020/01/02/world/europe/erdogan-turkey-libya.html>.

⁵² “Italy, Cyprus Say Turkey-Libya Maritime Deal ‘Unacceptable’”, in *AP News*, 29 January 2020, <https://apnews.com/3dae19f4097d0591478ec716831043b3>.

Greenstream pipeline. Italy is keen to keep ENI's operations up and running, as they control about 45 per cent of oil and gas production in Libya⁵³ and thereby "cover a significant part of Italy's energy demand",⁵⁴ having carried one million barrels of crude oil to Italy in 2018.⁵⁵ The NOC is currently being administered by the GNA; however, Haftar's militia is in a position to shut down several oilfields and block exports from Libyan ports. Such a manoeuvre in January 2020 resulted in grave disruptions to operations, costing Mellitah 9.4 million US dollars in revenue every day.⁵⁶ The oilfields were re-opened for a brief period in July, before they were shut off again.⁵⁷ Italy will want the blockades on oil fields and ports to be lifted as soon as possible to maintain a steady transport of oil and gas.

Turkey's actions in the region are making this difficult. Pushing back against the Turkey–GNA MoU, Greece and Egypt signed their own agreement on territorial waters and drilling rights. These developments have put Turkey and the GNA at loggerheads with Greece and other regional powers, and in turn, linked the resolution of the Libyan crisis to the resolution of a wider crisis in the eastern Mediterranean. The longer the crisis continues, the larger Ankara's influence on the GNA will be – which means that Libyan ports and airfields will likely remain under blockade, thereby jeopardising Italy's energy interests.

Italy is keen to put an end to the crisis in order to increase its freedom of movement within this Mediterranean space. However, in line with its traditional foreign policy, Rome is currently playing a balancing game without burning bridges with the EU and the US. This is why, despite the fact that recent developments have complicated Italy's interests in Libya, Italy has so far traced the middle line and maintained positive relations with all sides: while it has participated in the so-called EUNOMIA exercises in Cyprus with Greece, Cyprus and France, it also conducted a submarine drill with Turkey. Another reason for Italy's middle road is that it is sceptical of a more robust approach towards Ankara, as it is not convinced such a stance would push Turkey to de-escalate, regardless of how uncomfortable it is with the volatile rhetoric emerging out of several capitals. That said, Italy will not venture out of the larger diplomatic space created by the EU. This means that Italy will eventually align itself with the EU should it decide to adopt stronger measures vis-à-vis Turkey.

The migration portfolio will likely be fixed at the centre of CU negotiations, as it is a sensitive issue in Italian politics and will also be factored back into national discourses after the explosion in Beirut on 4 August. At the height of what became a

⁵³ Matteo Colombo and Valerio Vignoli, "Italy in the Eastern Mediterranean: Between Continuity and New Challenges", in *ISPI Publications*, 10 September 2020, <https://www.ispionline.it/en/node/27357>.

⁵⁴ Dario Romano Fenili, "Italy's New Approach to Libya", in *RUSI Commentaries*, 24 August 2020, <https://rusi.org/node/32429>.

⁵⁵ Observatory of Economic Complexity (OEC) website: *Libya*, <https://oec.world/en/profile/country/lby>.

⁵⁶ Carla Sertin, "ENI and Libya NOC's Joint Venture Is Losing 9.4mn USD per Day", in *Oil & Gas Middle East*, 2 February 2020, <https://www.oilandgasmiddleeast.com/node/35946>.

⁵⁷ Dario Romano Fenili, "Italy's New Approach to Libya", cit.

migration crisis in 2015, Italy had registered over 180,000 migrants and refugees,⁵⁸ most of whom had transited through Libya via the so-called central Mediterranean route of migration. This influx has caused many challenges for the country, including the surge in popularity of far-right parties supporting anti-immigration and often xenophobic policies. To prevent a similar situation from developing again, Italy concluded an agreement with the GNA in 2017 to fund training schemes for the Libyan coast guard, which has resulted in the interception of almost 40,000 migrants and their return to Libya.⁵⁹ In July, Italy renewed this immigration deal, according to which it will keep funding the training of the Libyan coast guard.

In order to allow for progress on CU negotiations, therefore, Italy will likely want to bring the connected crises in Libya and the eastern Mediterranean to a resolution that will have Libyan oilfields and ports resume operations as well as devising a more effective framework of cooperation that will contain future flows of migration through the central Mediterranean.

Conclusion

Italian–Turkish economic relations are healthy, with the countries cooperating on a range of projects and signing partnerships in diverse subjects. The opinion on Turkey, meanwhile, has varied greatly across the spectrum. The leadership, centre-right parties and business communities have been in favour of strengthening Rome’s economic and commercial ties to Ankara, including by upgrading the CU. Meanwhile, left- and right-wing parties, along with the majority of the Italian public, have been less interested. The leading concerns have mostly been linked to Turkey’s seemingly unstoppable backslide into authoritarianism.

Without the consolidation of Turkey’s democracy and the resolution of key foreign policy issues, a meaningful progress on CU negotiations will likely not be possible. Nevertheless, officials warn against an existentialist approach. Diplomats, trade officials and journalists who were interviewed for this report have contended that the economic relationship – which has been forged over decades of interactions – is too deeply rooted to be easily upended. Of course, an upgraded CU will make the relationship significantly more dynamic, with added economic benefits for both sides. Should the negotiations fall through, however, the current strong economic partnership will still hold.

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⁵⁸ Matteo Villa, “Italy Receives More Asylum Seekers from Germany than from Libya”, in *Politico*, 25 July 2019, <https://www.politico.eu/article/italy-migration-refugees-receives-more-asylum-seekers-from-germany-than-from-libya>.

⁵⁹ Human Rights Watch, *Italy: Halt Abusive Migration Cooperation with Libya*, 12 February 2020, <https://www.hrw.org/news/2020/02/12/italy-halt-abusive-migration-cooperation-libya>.

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