

Italy's Defence Policy and Possible Points of Contact with Norway

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ABSTRACT

Italy and Norway are located at the opposite ends of continental Europe, both playing crucial roles within NATO in the southern and northern flanks respectively. Under the surface of apparently diverging priorities, there are avenues for cooperation between the two countries. Rome is invested in European defence initiatives, being a driving engine of EU defence cooperation while participating in cooperative defence industrial programmes with the UK and the US. Italy is also one of the principal contributors to NATO operations and in general is keen to strengthen both NATO and the EU's defence outlook in order to enhance its own security. This peculiar position makes Rome an ideal interlocutor for matters tied to defence and defence industrial cooperation, especially for third countries wishing to retain access to the EU defence market, including Norway. The High North is a region of interest for Italy, as shown by multiple deployments of Italian forces as part of NATO exercises and operations. From an Italian perspective, then, a closer relationship with Norway would enable useful defence cooperation and exchanges of information and best practices.

European defence | NATO | Italian military policy | Norway

keywords

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Introduction

Traditionally since the end of World War II (WWII), defence and the role of the armed forces have struggled to take a prominent role in the Italian public and political debate. Even more so after the fall of the Berlin Wall, when the tangible threat of conventional war vanished along with the Soviet Union. Thirty years later, however, the Russian invasion of Ukraine has contributed to bringing defence matters to the forefront. So much so that, in the wake of the invasion, the Italian parliament voted overwhelmingly in favour of binding the government to gradually increase defence spending up to 2 per cent of GDP, though initially without a clear deadline.¹

To be sure, defence spending in absolute terms had been slowly but steadily increasing since 2015, a trend that sped up in 2021, despite the economic fallout of the Covid-19 pandemic.² As with many other NATO Allies, the willingness to gradually get closer to the 2 per cent NATO guideline was due to a number of issues. From Rome's perspective, the main driving factors (besides Russia's actions in eastern Ukraine and Crimea) were increasing instability in the wider Mediterranean region (in particular the Middle East) and Eastern Europe.

Rome has never reached the 2 per cent guideline since the Wales Summit in 2014, at times approaching percentages as low as 1 per cent of GDP.³ It has often argued

¹ Roberto Paolo Ferrari, "Budget Difesa al 2%. Il Parlamento vincola l'esecutivo. Il punto di Ferrari", in *Formiche*, 16 March 2022, <https://formiche.net/?p=1460638>.

² NATO, *Defence Expenditure of NATO Countries (2014-2022)*, 21 March 2023, https://www.nato.int/cps/en/natohq/news_212891.htm.

³ Michele Nones, "Difesa: spesa militare italiana all'1%, scherzando col fuoco", in *AffarInternazionali*, 16 February 2019, <https://www.affarinternazionali.it/archivio-affarinternazionali/?p=73007>.

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that the guideline is not a reliable measure of an Ally's contribution to collective defence within NATO. Italy holds that a better approach is one focusing around the so-called "cash, capabilities, contributions" (3Cs); while Italian defence spending (cash) has been insufficient, Italy's performance in terms of capabilities and contributions has been significant.⁴

The Russian invasion of Ukraine has certainly served as a facilitating factor for many of those NATO allies struggling to justify spending more on defence to an often-sceptical electorate; even in Italy the political debate – perhaps for the first time – focused extensively on the 2 per cent issue. Yet, this renewed attention still tends to swing toward hostility vis-à-vis increased defence spending.⁵ Indeed, the longstanding economic stagnation and woes affecting the country since the 1990s have left the Rome in a situation where even the slow and gradual increase in spending witnessed since 2015 has met considerable controversy.⁶

The German government's announcement in 2022 that it will reach the 2 per cent benchmark by 2024, whether realistic or not, arguably puts Rome under pressure both domestically and internationally, as Italy is the only major European NATO ally not planning to spend 2 per cent of its GDP on defence anytime soon. Indeed, in late March 2022 the former government led by Prime Minister Mario Draghi stated that while Italy would reach the 2 per cent mark, it would do so gradually and – crucially – by 2028 instead of 2024.⁷ Publicly, the Biden Administration has so far avoided expressing the sort of public criticism regarding uneven burden-sharing within the Alliance typical of the previous US Administrations. The fact that Italy is unable to be among the two-thirds of NATO members planning to reach or exceed the 2 per cent by 2024 might nonetheless expose it to some criticism behind closed doors.

As mentioned above, Rome believes it contributes its fair share to NATO's collective defence in other ways. For instance, Italy makes a large contribution to international operations relative to its general defence budget.⁸ Indeed, in recent years Rome has become one of the most eager troop contributors, not just in the NATO context. Italy until recently led NATO's peace support operation in Kosovo

⁴ Andrea Aversano Stabile, "Bilancio della difesa italiano: una chiave di lettura", in *Documenti IAI*, No. 19|07 (April 2019), <https://www.iai.it/en/node/10226>.

⁵ Pierangelo Isernia, Rossella Borri and Segio Martini, "How Italians View Military Spending", in *IAI Commentaries*, No. 22|20 (April 2022), <https://www.iai.it/en/node/15201>.

⁶ Ibid.

⁷ Barbara Fiammeri and Emilia Patta, "Spese militari: obiettivo 2% nel 2028. Tregua Draghi-Conte", in *Il Sole 24 Ore*, 31 March 2022, <https://www.ilsole24ore.com/art/sulle-spese-la-difesa-e-tregua-draghi-e-conte-AEgos2NB>.

⁸ For more information on Italy's current overseas deployments, see: Italian Parliament-Research Department, *Autorizzazione e proroga delle missioni internazionali nel 2023*, 6 July 2023, <https://temi.camera.it/leg19/provvedimento/autorizzazione-e-proroga-delle-missioni-internazionali-nel-2023.html>.

(KFOR)⁹ and assumed the leadership of the NATO mission in Iraq in May 2022 and the tactical command of AGENOR, the military component of the European Maritime Awareness in the Strait of Hormuz (EMASOH) mission in July.¹⁰ Italy's expertise in the field of stabilisation missions was recognised as Italy was chosen to host the NATO Stability Policing Centre of Excellence as well as the NATO Security Force Assistance Centre of Excellence.¹¹

In line with NATO and its allies, Italy is currently in the process of transforming its military and defence doctrine toward a multi-domain, joint operations approach. Rome's 2021-2023 Multiannual Planning Document officially named cyber and space as new full-fledged operational domains for the armed forces, alongside the traditional domains of land, air and sea.¹² A Network Operations Command (Comando Operazioni in Rete) has been operational within the Italian Ministry of Defence since 2020.¹³

Italy is also a very capable space-faring actor and is currently the second European state by number of assets operating in orbit and the third contributor to the European Space Agency. The country boasts a complete space value chain, including upstream and downstream capacities.¹⁴ The Space Operations Command (Comando Operazioni Spaziali – COS) was established in 2020 to further develop space operations and provide space services to the other domains.¹⁵

⁹ Leo Goretti and Irene D'Antimo, "Italy between the Draghi and Meloni Governments", in *Documenti IAI*, No. 23|03 (February 2023), p. 5-6, <https://www.iai.it/en/node/16562>.

¹⁰ Italian Ministry of Foreign Affairs and International Cooperation, *Mission by Ambassador Greganti in Iraqi Kurdistan*, 1 March 2022, <https://www.esteri.it/en/?p=73424>; Fabio Caffio, "L'Italia a Hormuz per la diplomazia navale nel Golfo", in *AffarInternazionali*, 18 July 2022, <https://www.affarinternazionali.it/?p=99435>.

¹¹ See the official websites of NATO Stability Policing CoE (<https://www.nspcoe.org>) and Security Force Assistance CoE (<https://www.nsfacoe.org>).

¹² Italian Ministry of Defence, *Documento programmatico pluriennale della difesa per il triennio 2021-2023*, 2021, <https://www.difesa.it/Content/Documents/20210804%20DPP%202021-2023%20-ult.pdf>.

¹³ Alessandro Marrone, Ottavia Credi and Ester Sabatino, "Italy and Cyber Defence", in *Documenti IAI*, No. 21|12e (September 2021), p. 12-19, <https://www.iai.it/en/node/14125>.

¹⁴ Italy operates the COSMO-SkyMed dual-use earth observation satellites, among other national earth observation capabilities. It also operates, jointly with France the Athena Fidus telecommunication satellite. For more information, see: Mathieu Bataille and Valentine Messina, "Europe, Space and Defence. From 'Space for Defence' to 'Defence of Space'", in *ESPI Reports*, No. 72 (February 2020), <https://www.espi.or.at/?p=963>; Giancarlo La Rocca and Alessandro Marrone, "Italy and space, a strong position to enhance", in Alessandro Marrone and Michele Nones (eds), "The Expanding Nexus between Space and Defence", in *Documenti IAI*, No. 22|01 (February 2022), p. 62-82, <https://www.iai.it/en/node/14669>.

¹⁵ *Ibid.*, p. 66.

1. The Italian approach to EU defence: Between strategic autonomy and the Strategic Compass

Strategic autonomy has not yet found a unifying definition within the EU, as even the recently adopted EU Strategic Compass fails to provide a clear explanation for instance of which scenarios would call for autonomous EU military operations.¹⁶ However, a general view of what the attainment of strategic autonomy should entail would imply at a minimum the ability for the EU to:

- deploy military forces autonomously in order to deal with crises and conflicts;
- secure supply chains;
- develop an efficient decision-making process in times of crisis.¹⁷

On balance, Italy's position on EU defence integration has been consistent with its traditional drive to work along multilateral lines, including in the field of defence. Crucially, there is no doubt in Rome that the only way to keep up with the breakneck pace of technological advancements that the defence field has witnessed during the last two decades is to pool funds and technical know-how in order to optimise investments, operation and maintenance costs. However, some Italian quarters are wary of a European defence integration process that disproportionately favours France and Germany.¹⁸

Given the proliferation of EU initiatives and institutional actors in the field of defence, it is important to point out the evolving roles the EU Commission (through the Directorate-General for Defence Industry and Space – DG DEFIS) and the European Defence Agency (EDA) should play vis-à-vis each other and European defence in general. Italian stakeholders highlight that the EDA's role as the main forum in which the defence ministries and armed forces can shape EU defence industrial policy (to a degree) must be supported.¹⁹ This point is seen as relevant in view of the increasingly prominent role played by the European Commission through the European Defence Fund (EDF),²⁰ mainly due to its financial incentives – which the Permanent Structured Cooperation (PESCO),²¹ for which the EDA acts as a secretariat, currently lacks.²²

¹⁶ Nicole Koenig, "Putin's War and the Strategic Compass. A Quantum Leap for the EU's Security and Defence Policy?", in *Hertie School Policy Briefs*, 29 April 2022, <https://www.delorscentre.eu/en/publications/detail/publication/putins-war-and-the-strategic-compass-a-quantum-leap-for-the-eu-security-and-defence-policy>.

¹⁷ Alessandro Marrone, "European Strategic Autonomy between Ambition and Pragmatism", in László Andor, Ania Skrzypek and Hedwig Giusto (eds), *Progressive Yearbook 2022*, Brussels, Foundation for European Progressive Studies, 2022, p. 133-143, <https://feps-europe.eu/publication/841>.

¹⁸ Discussions with Italian defence stakeholders.

¹⁹ Ibid.

²⁰ The EDF, managed by DG DEFIS, is an 8 million euro fund aimed at incentivising defence-related cooperative research and development projects in Europe.

²¹ PESCO is a legal framework aimed at providing a forum for EU member states and third countries to jointly plan, develop and invest in joint capability projects.

²² Discussions with European defence stakeholders.

2. A bridge between the EU and NATO and open to third countries

While in government, Prime Minister Draghi defined strategic autonomy as the condition in which the EU is capable of strengthening the European pillar of the NATO Alliance.²³ Draghi's view was coherent with decades of foreign policy, during which Italy was put considerable effort to playing an important role in keeping the transatlantic and EU arenas together in matters of defence and security.

Italy has a clear interest in (and is one of the most outspoken proponents of) a sound and complementary relationship between the EU and NATO in matters of defence. Having suffered almost constantly since the end of WWII from an exceedingly unstable political system, with 68 governments in 76 years since the birth of the republic in 1946, Italian governments – and their foreign policy – have often been plagued by a lack of legitimacy and continuity necessary for decisive policies in both the defence and foreign policy fields. Thus, a prominent role in multilateral fora often allows Rome to justify otherwise domestically controversial decisions regarding defence spending and investment, or troop deployments abroad. The messaging from the new government, presided by Giorgia Meloni since October 2022, has so far been unequivocal in its support for NATO and Italy's role as a prominent ally.²⁴ While the Meloni government has a parliamentary majority that could theoretically grant Italy a level of stability seldom seen in recent years, junior coalition partners have not been quite so clear in their condemnation of Russia's invasion of Ukraine.²⁵ However, in light of Meloni's commitment to continue efforts in supplying Ukrainian troops with weapon systems, it is unlikely that coalition infighting would eventually force the government to radically change its stance with regard to NATO and Ukraine.

While at first glance Italy's unwillingness to subscribe to Germany's Sky Shield Initiative (ESSI), now involving over fifteen countries, may appear to signal a break from Rome's preference for a multilateral approach to defence, it is explained largely by defence industrial considerations. Italy and France operate and produce their own, jointly-developed air and missile defence systems (the SAMP/T), which Berlin has excluded from the initial discussion around the ESSI, naming instead the German IRIS-T, the US Patriot and the Israeli Arrow 3 systems as the main choices.²⁶ As a consequence, Italian, and indeed French, involvement in ESSI will

²³ Italian Government, *Prime Minister Draghi's Address at the NATO Summit in Brussels*, 14 June 2021, <https://www.sitiarcheologici.palazzochigi.it/www.governo.it/ottobre2022/www.governo.it/en/node/17165.html>.

²⁴ Italian Government, *Phone Call between President of the Council of Ministers Giorgia Meloni and NATO Secretary General Jens Stoltenberg*, 27 October 2022, <https://www.governo.it/en/node/20786>.

²⁵ Angelo Amante, "Method or Madness? Berlusconi's Russia Stance Hurts Meloni and Italy", in *Reuters*, 20 October 2022, <https://www.reuters.com/world/europe/method-or-madness-berlusconis-russia-stance-hurts-meloni-italy-2022-10-20>.

²⁶ Anton Hahn, "European Sky Shield Initiative and Its Impact on European Ballistic Missile Defence", in *ISPK Policy Briefs*, No. 12 (February 2023), https://www.ispk.uni-kiel.de/de/publikationen_neu/ispk-policy-briefs/Policy_Brief_European%20Skyshield%20Initiative_Final.pdf.

remain unlikely as long as the initiative does not involve the SAMP/T system.

Recent developments notwithstanding, the importance of multilateral action in the pursuit of important Italian national interests extends to both NATO and the EU in equal measure, and increasingly so since defence has begun to play a more important role at the EU level through PESCO and EDF. It is in the domain of industrial cooperation that the main drive for EU defence integration is occurring and, accordingly, Italy is one of the main driving forces behind this complex process. Rome's main goal is largely to facilitate EU defence cooperation while at the same time avoiding that EU initiatives end up harming Italian industrial cooperation links with third countries like the US and the UK. In addition, Italian stakeholders are not alone in Europe in wishing to make sure the benefits in terms of work share, technological and market gains are distributed among EU members hosting competitive industries.

An important factor from an Italian perspective is the position a bilateral Franco-German partnership would take in key segments of the EU defence market also in light of Berlin's 2022 shift toward increased defence spending.²⁷

Germany's pre-Ukraine stance on EU defence (as on all defence-related issues) was typically more timid than France's, though in general the two countries have made an effort to form a united front on a number of important systems, such as the Future Combat Air System (FCAS) and the Main Ground Combat System (MGCS). Italy (as well as other countries) have found it challenging to take part in these projects under favourable work share conditions.²⁸

To an extent, from the Italian perspective, a strong defence industrial relationship with the US and, by extension, NATO is a necessary condition in order to safeguard its position in the wider European defence market, making sure EU-incentivised industrial integration and consolidation does not result in a less open market. Indeed, Italy made substantial investments in the F-35 programme, joining the programme early and hosting the only assembly line in Europe, where aircraft purchased by the Netherlands (and soon possibly other countries) are assembled.²⁹

²⁷ Elio Calcagno, "Numeri e implicazioni della svolta tedesca sulla difesa", in *AffarInternazionali*, 30 March 2022, <https://www.affarinternazionali.it/?p=96067>.

²⁸ Some issues have been experienced also by Germany. For instance, the FCAS programme has recently stalled due to disagreements over France's Dassault's role as lead for the Next Generation Fighter element of the project. See Vivienne Machi, "FCAS Warplane Program Stalls, as Dassault and Airbus Fail to Reach Key Industry Deal", in *Defense News*, 4 March 2022, <https://www.defensenews.com/global/europe/2022/03/04/fcas-warplane-program-stalls-as-dassault-and-airbus-fail-to-reach-key-industry-deal>.

²⁹ Marco Battaglia, "La Finlandia sceglie l'F-35. Così l'aereo americano ha battuto la concorrenza", in *Formiche*, 10 December 2021, <https://formiche.net/?p=1439103>. Interestingly, Italy and Norway share the Norway Italy Reprogramming Lab (NIRL) for the F-35. The facility is located at the Eglin airbase in Florida and it provides the two countries' armed forces with mission data files. See F-35 Lightning II Joint Program Office, *Norway Italy Reprogramming Lab Formally Accepted*, 28 September 2021, https://www.jsf.mil/news_detail?id=151.

In the last half-century, Rome has relied increasingly on a solid defence partnership with the UK especially in the field of combat aircraft, starting with the Panavia Tornado programme, through the Eurofighter Typhoon and all the way to the recently-announced Global Combat Air Programme (GCAP).³⁰ Thanks to Leonardo's presence in the UK defence market through its local subsidiary, Leonardo UK, Italy has a major stake in the UK defence industry and thus an interest in ensuring unhindered industrial ties between the two countries.³¹ Furthermore, the fact that GCAP now also involves Japan as a fully-fledged partner demonstrates further the need for Italy to keep the European defence market favourable or at least not hostile to third countries' involvement in strategic programmes.³² Crucially, Rome values NATO as the only defence framework which includes all European powers (including the UK), as well as North America and Turkey, which is itself an increasingly influential actor in the wider Mediterranean. Notably, Rome wants to maintain a good working relationship with Ankara despite the inevitable frictions resulting from the ongoing disputes in the eastern Mediterranean.³³

More in general, Italian interests in the context of the NATO-EU relationship focus on:

- avoiding divergences and duplication between NATO and EU respective defence planning process, following the "single set of forces" principle;
- creating and safeguarding Euro-Atlantic defence environment, which benefits market competition and innovation;
- developing complementary toolboxes to deal with hybrid warfare on the eastern flank;
- make the best of NATO's and the EU's respective added value to deal with security challenges from the wider Mediterranean region.³⁴

3. NATO's Strategic Concept

Italy's most recent White Paper for International Security and Defence, published in 2015, identified NATO as the only body capable of ensuring the necessary levels of deterrence and defence capabilities from conventional threats in the transatlantic

³⁰ Ester Sabatino (ed.), "La collaborazione italo-britannica nel settore della difesa e sicurezza dopo la Brexit", in *Documenti IAI*, No. 21|09 (April 2021), <https://www.iai.it/en/node/13263>.

³¹ Ibid.

³² Douglas Barrie and Yuka Koshino, "Italy Japan and the UK Launch a New Combat-Aircraft Programme", in *IISS Online Analyses*, 13 December 2022, <https://www.iiss.org/online-analysis/online-analysis/2022/12/italy-japan-and-the-uk-launch-a-new-combat-aircraft-programme>.

³³ Dario Cristiani, "Mediare per necessità: l'Italia e le insidie del Mediterraneo orientale", in *AffarInternazionali*, 14 December 2020, <https://www.affarinternazionali.it/archivio-affarinternazionali/?p=86002>.

³⁴ Alessandro Marrone, "Continuity and Novelties in Italy's Outlook on NATO's Strategic Concept", in *Elcano Analyses*, 25 February 2022, <https://www.realinstitutoelcano.org/en/analyses/continuity-and-novelties-in-italys-outlook-on-natos-strategic-concept>.

space.³⁵ While the document's assertion that conventional threats were at the time of publication unlikely has been rendered outdated by the Russian aggression on Ukraine, its tenet about the centrality of NATO to the defence of Italy and the transatlantic space is still very much relevant.³⁶

Italy's commitment to NATO as the bulwark of its national defence is demonstrated in practice by the country's participation in NATO deployments, which recently saw Italian F-35 aircraft deployed in the Baltics and Iceland, Eurofighters to Romania and indeed its participation in the Cold Response exercise hosted by Norway.³⁷ Furthermore, in May 2022, Italian Navy flagship and aircraft carrier *Cavour*, along with its carrier group, was placed under the NATO command structure in the context of NATO's Neptune Shield 22 vigilance activity, in a first for Italy. Interestingly, this was also the first time a non-US carrier strike group has operated under the NATO flag.³⁸

The 2010 NATO Strategic Concept made crisis management one of the three core tasks for the Alliance. Accordingly, NATO would "engage, where possible and when necessary, to prevent crises, manage crises, stabilize post-conflict situations and support reconstruction".³⁹ Given the much-increased instability that has hit the Middle East and North Africa (MENA) region since right after the publication of the Strategic Concept, Rome have been maintaining this as one of the core tasks for the Alliance as a possible avenue for action and cooperation with Allies should future conflicts and crises pose a great risk to stability in the Mediterranean. The 2022 Strategic Concept did maintain crisis prevention and management as a core task, but this plays a secondary role with respect to deterrence and defence: a foreseeable development given the sense of insecurity brought about by Russia's invasion of Ukraine.⁴⁰

One of Italy's recurring arguments in discussions surrounding NATO and its future direction is that the Alliance should not forget the southern neighbourhood, which is the source of many different instability factors (terrorism, civil war, illegal migration, challenges to energy security and maritime routes to name a few). While it is clear that the new Strategic Concept has brought NATO's main focus

³⁵ Italian Ministry of Defence, *Libro bianco per la sicurezza internazionale e la difesa*, July 2015, http://web.archive.org/web/20230309090718/https://www.difesa.it/Content/Pagine/Libro_Bianco.aspx.

³⁶ Ibid.

³⁷ Alessandro Marrone, "Continuity and Novelties in Italy's Outlook on NATO's Strategic Concept", cit.

³⁸ Naval Striking and Support Forces NATO, *NATO Concludes Vigilance Activity Neptune Shield 22*, 1 June 2022, <https://sfn.nato.int/newsroom/news-archive/2022/nato-concludes-vigilance-activity-neptune-shield-22>.

³⁹ NATO, Active Engagement, *Modern Defence. Strategic Concept for the Defence and Security of the Members of the North Atlantic Treaty Organisation*, 19 November 2010, point 20, https://www.nato.int/cps/ua/natohq/topics_82705.htm.

⁴⁰ NATO, *NATO 2022 Strategic Concept*, 29 June 2022, https://www.nato.int/cps/ua/natohq/topics_56626.htm.

back to the Russian threat and by extension to the eastern flank, the document also gives more attention to the southern neighbourhood than its predecessor, in a welcome – albeit small – development for Italy. Indeed, the 2010 Strategic Concept only dealt with the southern flank insofar as it reiterated NATO's commitment to "the development of friendly and cooperative relations with all countries of the Mediterranean".⁴¹ By contrast, the latest Concept states that "fragility and instability in Africa and the Middle East directly affect [NATO's] security".⁴²

Nevertheless, it remains to be seen whether and to what extent NATO will, in the short and medium term, find the consensus needed to undertake out of area operations at a time of rising geopolitical competition with Russia and China, marked by their increasing involvement as systemic rivals (as seen in Syria and Libya in the Russian case). Furthermore, the Western (and NATO) retreat from Afghanistan will loom large on the current mission in Iraq and any further NATO missions outside of Europe. Within a NATO framework, however, training and capacity building missions are one area in which Italy can be expected to continue making a very substantial contribution.

4. Italy's wider Mediterranean focus

Rome's main strategic focus, as outlined in the MoD's "Security and Defence Strategy for the Mediterranean" document, is centred on the wider Mediterranean, which roughly encompasses the area between the Gulf of Guinea, the whole Mediterranean Basin including the Black Sea, the Red Sea and Western Indian Ocean, extending to all the contiguous regions (thus including the Sahel and the Horn of Africa).⁴³ It is no surprise then that Italy has been among the chief proponents of a NATO that also looks to the southern flank as a source of a wide array of threats and instability. The Mediterranean has historically rarely been a centre of stability, yet the 2011 so-called Arab Spring has ushered an exceedingly fraught decade in the region.

Among all the unsettled revolutions that have shaken the MENA, the one which most closely affects Italy is undoubtedly Libya. Massive migration flows, thousands of migrant deaths at sea and the loss of Italy's hitherto position in the country as the leading foreign actor in the field of fossil fuels have all been a considerable setback for Rome.

Furthermore, the last five years have seen increasingly bold attempts by Russia to exploit instability in order to gain a foothold in the Mediterranean, raising the alarm in Italy that the Mediterranean is once again a source of conventional threats

⁴¹ NATO, *Active Engagement, Modern Defence*, cit., point 35.

⁴² NATO, *NATO 2022 Strategic Concept*, cit., point 11.

⁴³ Italian Ministry of Defence, *Strategia di sicurezza e difesa per il Mediterraneo. Edizione 2022*, May 2022, https://www.difesa.it/Il_Ministro/Documents/Strategia%20Mediterraneo%202022.pdf.

too. Russia's Tartus naval base in Syria, while already in existence before the Syrian war, has been expanded considerably in recent years.⁴⁴ Moscow also stepped up its involvement in the Libyan civil war in 2019, which would have led to the demise of the UN-backed Tripoli-based government had it not been for Turkey's intervention.⁴⁵

While Rome's chief strategic concerns revolve around the Mediterranean basin, an unprecedented level of attention toward the Indo-Pacific is also emerging, first with the deployment of a modern, state-of-the-art offshore patrol vessel to the region and all the way to Japan, and then with an announcement that an Italian carrier strike group will sail to Japan by 2024.⁴⁶ While in a way the widening of the Italian Navy's horizons follows the example of other European powers with more global ambitions, such as the UK and France, these recent developments may be seen as a concrete attempt to make a strategic use of an important asset such as the aircraft carrier *Cavour*. A regular approach to showing the Italian flag in the Indo-Pacific, which contains a number of important export markets for the Italian industry, may bring benefits not only in terms of expeditionary and power-projection training for the involved military personnel, but also in terms of strengthening partnerships with regional actors – especially Japan.⁴⁷

5. Takeaways for Norway and potential avenues for cooperation

Norway and Italy find themselves at opposite flanks in NATO only geographically. Both highlight NATO's role as the pillar of their own as well as European security. Indeed, for Italy – also a leading EU member state – NATO takes precedence over the EU as a defensive framework. Among the most militarily capable EU-member NATO Allies, Italy stands out as the most committed to the transatlantic relationship not only in words but in practice too, with industrial partnerships with the UK and important ties with the US. An exchange between Norwegian and Italian stakeholders on the northern and southern flanks, could help the respective capitals better understand each other's operational challenges vis-à-vis Russian conventional and hybrid threats.

Italy, like Norway, has a deep interest in an open European defence market which can prevent a continental defence environment characterised by scarce competition. It is against this backdrop that Italy pushed hard for third-country

⁴⁴ Henry Foy, "Russia to Invest \$500m in Syrian Port of Tartus", in *Financial Times*, 17 December 2019, <https://www.ft.com/content/f52bdde6-20cc-11ea-b8a1-584213ee7b2b>.

⁴⁵ International Crisis Group, "Turkey Wades into Libya's Troubled Waters", in *Europe Reports*, 30 April 2020, <https://www.crisisgroup.org/node/13440>.

⁴⁶ Gabriele Carrer and Emanuele Rossi, "Crosetto a Tokyo e Nave *Cavour* verso il Pacifico. Le mosse italiane", in *Formiche*, 15 March 2023, <https://formiche.net/?p=1540648>.

⁴⁷ IAI argued for a re-think regarding how Italy could deploy its aircraft carrier beyond just pure deterrence. See Alessandro Marrone and Elio Calcagno (eds), "Naval Combat Systems: Developments and Challenges", in *Documenti IAI*, No. 23|01 (January 2023), <https://www.iai.it/en/node/16476>.

access to PESCO and EDF projects, an access which has benefitted Norway too.⁴⁸ Thus, Rome is arguably an ideal partner to bridge gaps between the EU and NATO, a fact that might be useful to Oslo.

Italy can be expected to continue pushing for increased NATO attention to the southern flank, but this position should not be seen in Oslo as potentially detrimental to Norway's focus on the High North. Indeed, this policy in Rome is mostly geared toward keeping the southern flank high on NATO's agenda and, in the framework of the new Strategic Concept, trying to carve an added value, even if limited, for NATO for the stability of this region. Specifically, Italy's southern flank focus should not be seen as exclusive and in conflict with Norway's High North policy for two reasons:

1. the Italian armed forces are committed to all NATO's flanks, as demonstrated recently by their participation in the Cold Response exercise, which was important not only from a quantitative standpoint but also a qualitative one, as the Italian aircraft carrier Garibaldi operated as the amphibious task force flagship;⁴⁹ moreover, in spring/summer 2023 three Italian ships were deployed to the Baltic Sea simultaneously, with a frigate taking part in the NATO exercise Formidable Shield, a destroyer aiming to bolster Polish anti-missile defences, and an amphibious landing ship taking part in NATO's Littoral Expeditionary Group.⁵⁰ Meanwhile, the Italian army's Alpine troops are well trained and equipped to operate on difficult terrain like the Alps, in very low temperatures and snowy conditions;
2. with Russia's recent forays into the Mediterranean and its coasts (and its invasion of Ukraine), conventional threats have again taken centre stage in the region, meaning that there is less distance between the ideal tasks the two countries envisage for the alliance in the coming years. In other words, the Russian threat from the East is challenging NATO on both southern and northern flanks, and needs a comprehensive response by allies.

Rome and Oslo share an interest in NATO and the EU developing complementary toolboxes to face hybrid threats. This may be a field in which the two countries could work together, making sure the declaration – which will set the tone for future cooperation between the two blocs at a time of great geopolitical uncertainty – sets the right tone and establishes a clear work-sharing agenda.

⁴⁸ The results of the 2021 EDF calls showed that more Norwegian companies were represented in winning consortia than companies from the US or even Poland. See European Commission, *Factsheet - EDF2021 - Results of the Calls for Proposals - General Overview*, 25 January 2023, https://defence-industry-space.ec.europa.eu/system/files/2023-01/Factsheet%20-%20EDF2021%20-%20Results%20of%20the%20Calls%20for%20Proposals%20-%20General%20Overview_UPDATE_GA.pdf.

⁴⁹ Italian Ministry of Defence, *NATO: conclusa esercitazione Cold Response 22*, 1 April 2022, https://www.difesa.it/SMD_/Eventi/Pagine/Conclusa_esercitazione_NATO_Cold_Response_22.aspx.

⁵⁰ "La forza navale italiana da record: 11 navi italiane all'estero", in *Infodifesa*, 26 May 2023, <https://infodifesa.it/la-forza-navale-italiana-da-record-11-navi-italiane-allestero>.

Oslo has had a long-standing interest in taking part in EU Common Security and Defence Policy (CSDP) missions and operations.⁵¹ Given Italy's traditional role as a prominent contributor to EU missions (with nearly a thousand personnel currently deployed), Rome could be identified in Norway as a crucial interlocutor among EU member states.⁵²

Recent Russian naval deployments off Italy's territorial waters have gained a lot of attention in the Italian media and public sphere, in part because the public is not used to this sort of posturing by an adversarial state. An exchange between Norway and Italy on conventional threats at sea, based on Norway's longstanding experience dealing with Russian naval presence and posturing near Norwegian territorial waters, may be a useful starting point on an exchange regarding how to best deal with this specific challenge.

Furthermore, joint naval exercises when Norwegian and Italian ships are deployed in the respective principal theatres of operations would help increase the exchange of best practices and enhance interoperability at a time when the Russian threat transcends the eastern flank.

Finally, at a time of fast-paced technological change and multiplying challenges, where multi-national consortia represent a significant opportunity for optimising investment while avoiding duplication, an exchange involving stakeholders from the respective defence establishments (MoD, industry, think tanks) might provide a useful platform to explore possible avenues for cooperation at the industrial level. The good results scored by both Italy and Norway on 2021 EDF first wave of calls is an important element in this regard.

Updated 17 July 2023

⁵¹ EU Delegation to Norway, *The European Union and Norway*, 28 July 2021, https://www.eeas.europa.eu/node/410070_en; Norwegian Ministry of Foreign Affairs, *Cooperation on Foreign and Security Policy*, last updated on 7 January 2022, <https://www.regjeringen.no/en/id684931>.

⁵² Italian Government, *Deliberazione del Consiglio dei ministri in merito alla partecipazione dell'Italia a ulteriori missioni internazionali per l'anno 2023, adottata il 1° maggio 2023*, <https://www.senato.it/service/PDF/PDFServer/BGT/1375817.pdf>.

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