

THE EVOLUTION OF TURKIYE'S AMBITIONS IN THE WIDER MEDITERRANEAN AND ITS POSSIBLE EFFECTS ON ITALY

Project Report

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THE EVOLUTION OF TÜRKİYE'S AMBITIONS IN THE WIDER MEDITERRANEAN AND ITS POSSIBLE EFFECTS ON ITALY

Türkiye's agenda in the wider Mediterranean has been experiencing unprecedented de-escalation with historical competitors since 2021. tRecently, from the MENA to the Caucasus, from Israel and Greece to the Arab Gulf, Ankara's strategic and national interest has been matching with normalization processes and regional stability. Its role as mediator in the war in Ukraine has also helped Türkiye regaining credibility at the Western eyes, while maintaining close relations with Moscow. This positive stance, meant at paying in term of diplomacy, trade, and economy could mark a new course both for the country strained by internal economic crisis and the whole region, by opening margins for new strategic opportunities and partnerships in which the EU and Italy could also play a significant role.

INTRODUCTION

Since 2021, key players in the wider Mediterranean have shown new regional and foreign policy dynamics. After the announced U.S. disengagement from the MENA region, negotiations, rapprochement, de-escalation, have become determining factors in bilateral and regional relations. Furthermore, Türkiye has entered a new phase of normalization with its historical competitors.

In the wake of the al-Ula agreement and after years of intense hostility with some Gulf countries, Ankara has normalized relations first with the UAE and then with Saudi Arabia. Recently, following the Arab League member states' decision to welcome Syria back into the organization and the increasing pressure of the refugee issue in Türkiye, a road map for normalization of relations between Türkiye and Syria has come to the agenda. Nevertheless, after years of crises in the Eastern Mediterranean, Türkiye has started negotiations with Israel, as well as it engaged in a constructive dialogue with Egypt. The twin earthquakes that hit the southeastern part of Türkiye last February, labeled as 'the disaster of the Century', led to the 'earthquake diplomacy' between Türkiye and Greece by easing tension between two countries as well as by accomplishing a full diplomatic rapprochement with Tel Aviv. Besides, as spillover of the Azeri-Turkish victory in Nagorno Karabakh, talks have resumed with Armenia.

In these *look-for-stability* dynamics, there is also the more recent role played by Ankara in the conflict between Russia and Ukraine. While condemning the Russian offensive toward Ukraine and granting defense support to Kiev, Ankara has been acting as a mediator, attempting to preserve its strategic interests. Although Türkiye, as a NATO member, has traditionally performed the function of containing Russia in the Alliance's southeastern flank to maintain regional balances, Turkish-Russian diplomatic and economic relations have increased in the last decades. Indeed, Türkiye and Russia have been working to transform their century long political disputes into a geo-economic partnership. From the 2000s onwards, there have been improvements in the diplomatic relations aiming at expanding trade volume; high level visits between leaders of both countries; energy cooperation agreements, also in the nuclear field. More recently, in situations of conflict and conflicting interests, such as in the Syrian, Libyan, and Caucasian chessboards, the cooperation between Ankara and Moscow has shown itself to be compartmentalized, proving a sort of diplomatic flexibility aimed at avoiding a direct confrontation while preserving the own legitimate interests.

Therefore, the current regional dynamics, from the war in the Black Sea, to the normalization processes in the MENA and the pending energy issues in the Mediterranean, prompt due reflection on the current and future role of Ankara within the West and European architecture, also concerning Italy's interest.

Indeed, Türkiye's close relations with Moscow as well as the strategic alliance - despite its ups and downs with the US-, pivot on the assumption of national interests' protection with bilateral connotation and specific regional effects. Hence, they must be read in a proportionally inverse logic: the closer Türkiye gets to Russia, the more the tensions with the West and Washington increase.

This research paper is mainly the result of a series of roundtables, which gathered prominent institution representatives, scholars and area experts aiming at discussing Turkish role in the current Russia-Ukraine War, by entangling the recent evolution of the Turkish ambitions in the wider Mediterranean and its impact on Ankara's relations with the main international players. A special focus has been dedicated to the crucial energy issue, as Türkiye aims at arising as an energy hub. Also, a session deeply analyzes Türkiye's normalization process in the region. The events had been held regularly behind closed doors during the first semester of year 2023, thanks to the financial support¹ of the Italian Ministry of Foreign Affairs and International cooperation- Analysis, Programming, Statistics and Historical Documentation Unit². The round tables took place under the roof of the project *The evolution of Turkish ambitions in the wider Mediterranean, between normalization processes, energy issues and the relations with Moscow. What are the impacts in the strategic partnership with Italy?*, carried out by CeSPI³ and the Department of Political Science and International Relations of the Haliç University⁴ of Istanbul.

¹ Funds are based on Article 23-bis of Presidential Decree N.18/1967.

² The contents of this paper are the sole responsibility of the authors and do not necessarily reflect the views of the Italian Ministry of Foreign Affairs and International Cooperation.

³ In 2019, CeSPI launched the Turkey Observatory (<https://www.cespi.it/it/ricerche/osservatori/osservatorio-turchia>), which aims to monitor and disseminate objective and detailed knowledge on Turkey and its regional and international relations. Thanks to a network of Italian and Turkish experts, the Observatory carries out regular updates on Turkey's domestic and foreign agendas through briefs, insights, and seminars.

⁴ The Department of Political Science and International Relations at Haliç University in Istanbul (<https://isletme.halic.edu.tr/tr/bolumler/hakkinda/siyaset-bilimi-ve-uluslararasi-iliskiler>) founded in 2011, aims to examine politics, ideologies, interstate relations and related processes, interacting with disciplines such as sociology, history economics. It also aims to bring different interpretations to current problems and offer original solutions through multidisciplinary expertise on different dimensions of history, politics and international relations.

1. A PLANE WITH TWO WINGS: TÜRKIYE'S APPROACH TO THE WAR IN UKRAINE

1.1 Türkiye's interests and balancing diplomacy

In the last year and a half of Russia-Ukraine conflict, Türkiye has been playing a delicate balancing act. Since the very beginning, Ankara classified the Russian invasion of Ukraine as a war, activating Article 19 of the Montreux Convention,⁵ hence closing the passage through the straits to both Russian and Ukrainian warships. Furthermore, Ankara, urged non-coastal countries -including NATO members- not to send warships to the Black Sea, putting into effect the restrictions outlined in Article 21 of the Convention,⁶ which states that in the event of perceiving a close war threat, the passage of warship is left to Türkiye's discretion.

After these developments, and almost throughout 2022, Ankara, based on its NATO membership and its bilateral relations with Moscow, adopted a facilitator discourse and approach. While Türkiye refrained in adopting the Western sanctions against Moscow and kept its air-space open to carrying passengers from and to Russia as well as for evacuating diplomatic and humanitarian crew from Ukraine, the contacts with both warring parties have never interrupted, also thanks to the personal relations of President Erdoğan's with his counterparts.

Erdogan's regular meetings and calls with Putin and Zelensky aimed at keeping the dialogue open as well as protecting Turkish interests and easing the mediations. These diplomatic efforts include both the initiatives and deals for the opening of humanitarian corridors and the prisoner swaps between Moscow and Kyiv. Moreover, bringing together Ukrainian Foreign Minister Kuleba and Russian Foreign Minister Lavrov within the framework of the Antalya Diplomacy Forum in 2022, as well as the meeting of Russian and Ukrainian delegations in Istanbul on March 29th, are the direct results of Türkiye's active mediation policy. Furthermore, the Grain Deal signed in July 2022, agreed to open a safe maritime humanitarian corridor in the Black Sea, was a step acknowledged by UN as 'international success made possible thanks to Ankara's leverage'⁷. Thus, so far Ankara has managed to pursue a balancing diplomacy regarding its relations with Russia and its Western allies.

However, Türkiye's mediator role lies on specific reasons. Indeed, Türkiye's support to Ukraine dates back to years before the conflict. Ankara has been supporting the cause of Ukraine's territorial integrity and independence since the occupation and annexation of Crimea in 2014. Those occupied lands are of great importance to Türkiye, both historically and symbolically, and still evoke a vivid memory in the social psychology of the country. Ever since the Ottoman Empire extended to the modern southern Ukraine, including the port city of Odessa, then known as Hacıbey, there is evidence of great tensions that culminated in the conquest by Imperial Russian forces in the Russo-Turkish War of 1787-1791. Although Crimea had already been conquered by the Russians in 1783, the defeat ushered in gradual decline of the Ottoman Empire. Historically, the Black Sea represents the scenario of the great rivalry between Turkey and Russia and in this context the strong bond of Ankara with the Tatar community of Crimea is inserted. In other words, this needs to be intended as a crucial

⁵ To the Convention in full see <https://cil.nus.edu.sg/wp-content/uploads/2019/02/1936-Convention-Regarding-the-Regime-of-the-Straits-1.pdf>

⁶ *Ibid.*

⁷ UN News, <https://news.un.org/en/story/2022/09/1126811> <https://www.dailysabah.com/business/economy/un-chief-thanks-turkiye-for-extension-of-ukraine-grain-deal>

factor in the support granted to Ukraine in the repeated crises with Russia. Indeed, the Tatars are a Sunni Muslim community who speak a Turkish dialect and which over the centuries, due to repression and mass expulsions, have been reduced to a minority. Türkiye, therefore, stands as guarantor of the Tatars and it has sheltered many of them from the eruption of hostilities.

Moreover, the ties between Kiev and Ankara strengthened over the past years, especially in terms of security and military cooperation. Already in 2019 Ukraine became the second customer of Turkish drones (following Qatar) and in 2020 Türkiye and Ukraine signed military cooperation agreements in Istanbul⁸. In a time when the Nagorno-Karabakh conflict was putting a strain on Türkiye's relations with Russia, the moves came as an effort to counterbalance Russia's dominance in the Black Sea region. Then, shortly before the war in Ukraine, along Erdoğan's visit to Kiev in early February 2022, Türkiye and Ukraine signed several agreements including the establishment of a factory and production facility in Ukraine aiming at transferring technology for the manufacturing of Bayraktar TB2 arm drones and incorporating it into Ukrainian industry. Hence, both Ukrainian army and navy used Turkish drones. Based on the statements of the Turkish Bayraktar officials, the company is still providing support to the existing TB2 fleet of Ukrainian forces making updates to the softwares, providing operational support. Both in terms of defense industry, foreign policy and at the psychological level, TB2 has become indeed a symbol of Turkish-Ukrainian cooperation.

At the same time, Türkiye has maintained working relations with Russia. Türkiye and Russia have been working to transform their century long political disputes into a geo-economic partnership. From the 2000s onwards there have been improvements in the diplomatic relations including expanding trade volume, high level visits between leaders of both countries, cooperation agreement in the nuclear fields. Over time, relations between the parts have been based on sectorial understandings that aim to protect mutual economic and strategic interests, without excluding competition or direct confrontation. Indeed, the political and security dimensions of bilateral relations have become inseparable from issues concerning Syria, Libya, the Black Sea, and, of course, the Caucasus.

These developments, which directly affects Türkiye's relations with Ukraine and Russia, as well as Türkiye's concerns regarding the Black Sea and energy security, has prompted Ankara to respond by condemning Moscow's actions and emphasizing Ukraine's territorial integrity and sovereignty. However, Türkiye did not participate in the economic/trade sanctions imposed on Russia by EU countries and the United States. This move reflects Türkiye's strategic approach, which takes into account its deepening relations with Russia in various fields, regional dynamics, and national interests. Also, as a notable topic in Türkiye-Russia bilateral relations was the increasing trade volume between the two countries. Türkiye's trade volume with Russia has nearly increased by 50 percent due to Ankara not being involved in the sanctions imposed by Western countries on Russia. Türkiye's energy imports from Russia play a significant role in this growth. The quantity of petroleum products imported by Ankara from Russia has doubled.⁹ This increase, mainly due to the sanctions imposed by Western countries, signifies Türkiye becoming an alternative market and supplier for Russia, which has faced significant limitations in trade with the West. While this is considered a success and a positive outcome for the Turkish economy, the potential political challenges it may create in relations with the West should also be considered. Indeed, since Türkiye is not a member of the European Union, Ankara claims that is not obligated to transpose EU sanctions into its local law and impose those sanctions.¹⁰

⁸ See VOA news, *Turkey, Ukraine Sign Military Cooperation Agreements*, October 2020. https://www.voanews.com/a/europe_turkey-ukraine-sign-military-cooperation-agreements/6197240.html

⁹ See Euronews, *Türkiye'nin Rusya'dan Petrol İthalatı Geçen Yıla göre İkiye Katlandı*, August 2022, <https://tr.euronews.com/2022/08/22/turkiyenin-rusyadan-petrol-ithalati-gecen-yila-gore-ikiye-katlandi>.

¹⁰ Türkiye's accession negotiation to the EU was officially launched in 2005. However, the process is de facto frozen since 2016. To go into depth in EU-Turkey relations see Giannotta V. Ianni A., Açıkgöz M, *The refugee*

In this regard, the fatigue of accessing EU full membership directly affects the EU influence on Türkiye's decisions by lessening the European leverage.

1.2 Türkiye, Sweden & Finland's NATO accession

Other elements are under the “Western eye” monitoring, as the issue of NATO enlargement to Sweden. With the outbreak of the war in the Black Sea, Sweden, together with Finland, decided to abandon the non-alignment stance and apply for NATO membership. As a member of NATO for 71 years, Türkiye has always supported NATO's open-door policy and its enlargement with new members. Ankara has traditionally supported countries that now comprise the eastern flank of NATO, from Poland and Hungary to Albania and North Macedonia to enter the organization. Türkiye supports the NATO membership prospects of Ukraine, Georgia and Balkan countries and has also developed strong military partnership with some of these countries. However, this time Türkiye expressed its reservation, conditioning its green light to concrete steps to be taken by Scandinavian countries against PKK, which is listed as terrorist organization by Türkiye, the US and the European Union. In June 2022, Finland and Sweden signed a memorandum with Türkiye to address Ankara's security concerns, and from that time on various meetings have been held between officials and diplomats to discuss its implementation. In March 2023, Türkiye lifted its veto on Finland access to NATO, but Sweden's membership is still pending. While considering Sweden anti-terrorism law adopted in June 2023 to address Türkiye security concerns ahead of the NATO summit scheduled for mid-July, it is still unclear whether the move will be enough for Türkiye to ease Sweden's NATO bid. Beyond security, the issue is of utmost importance also for USA-Türkiye relations. Türkiye might have a way to get beyond the S-400/F35 crisis and potentially obtain the purchasing of F-16 from the USA. Indeed, in October 2021 Türkiye requested to buy \$20 billions of Lockheed Martin Corp F-16 fighters and nearly 80 modernization kits for its existing warplanes.¹¹ Moreover, one of the conditions added to the trilateral memorandum signed between Türkiye, Sweden and Finland at NATO Madrid Summit in 2022 was to lift direct and indirect arms embargo they imposed on Türkiye.¹² Both Finland and Sweden fulfilled this condition and made necessary regulatory amendments not to impose arms embargo on Türkiye. However, part of the US Congress linked the F16 sale to Türkiye with NATO accession bids of Sweden and Finland.¹³ Despite Biden administration supports to the F16 sale to Türkiye and the possibility of Türkiye's approval of Swedish membership at NATO leaders' summit in this July, Congress might continue its opposition to deal due to disagreements between Türkiye and the US over Russia and Northern Syria, pending issues between Türkiye and Greece and US concern on Turkish domestic sphere.¹⁴

issue in Turkey's relations with the EU, CeSPI Research Report, May 2021, https://www.cespi.it/sites/default/files/osservatori/allegati/the_refugee_issue_in_turkeys_relations_with_the_eu_-_may_2021.pdf

¹¹ See Patricia Zengerle, *Senior US lawmaker wants change from Turkey before F-16 sale approval*, Reuters, May 2023, <https://www.reuters.com/world/senior-us-lawmaker-wants-change-turkey-before-f-16-sale-approval-2023-05-31/>

¹² According to trilateral memorandum, “defence exports from Finland and Sweden will be conducted in line with Alliance solidarity”.

¹³ To go into depth, see Zanotti J., Clayton T., Parrish P., *Turkey (Türkiye): Possible U.S. Sale of F-16 Aircraft*, Congressional Research Service, June 2023. <https://crsreports.congress.gov/product/pdf/R/R47493>

¹⁴ *Ibid.*

1.3 *Two-chairs scenario*

Türkiye *sitting in the two chairs* attitude has paid off and it is likely to remain the high road for Ankara's agenda in the near future. However, some questions on the sustainability of this approach arise in the longer term, not only regarding Türkiye's policy approach and international stance, but also considering the internal political developments both in Russia and USA.

By now, Erdoğan's re-election can be an opportunity in strengthening ties for both Russia and the US, while considering Türkiye's relations with one-another and the bilateral frictions between US and Russia. On the one hand, Türkiye is counterbalancing Russian regional power; also, Türkiye's role in Ukraine's defense, Ankara's rapprochement with Israel and de-escalation with Greece, are signs that US can rely on Türkiye, if this positive attitude remains on track. Besides, Türkiye is a NATO member and a candidate country to the European Union. Ankara's strong political relations, proactive foreign policy, its defense cooperation, as well as Türkiye's mediation efforts in many regions from the Balkans to the Black Sea and Caucasus also means a greater consolidation of the Euro Atlantic community in these areas and a contribution to stability in the whole region. In turn, Ankara looks for security guarantees particularly concerning its southern border. While considering the thaw between Ankara and Damascus, marked by the high-level talks held in Moscow last April and May at the presence of Iran, Syria, Russia and Türkiye defense and foreign minister, many matters of concern remain open for Türkiye. The refugee issue, the military bases of Russia and Iran in Syria, and the PKK presence in both Northern Syria and Iraq are hot topics in Turkish neighboring agenda. On the other hand, Ankara maintains strong diplomatic, trade, tourism, and other relations with Russia, that go beyond mutual sympathy between the two heads of state and their national-populist rhetoric in politics. During last year, Russians opened more than 1,300 new companies in Türkiye.¹⁵ In addition, Russia is Türkiye's major energy supplier. With the operationalization of TurkStream in 2022, Türkiye's natural gas imports from Russia have continued to increase. Despite some delays in the construction of the Akkuyu Nuclear Power Plant, which is one of the main symbols of energy cooperation between the two, the commissioning of the first unit of the plant is expected to take place in 2023. Nowadays, Erdoğan needs to ail Türkiye's economy and the deepening of economic and energy ties with Russia is part of this effort. Thus, while considering the existence of different strategic interests and areas of competition, until now the two leaders have opted to find sectorial agreements in what can be defined as a compartmentalized relation.

¹⁵ See Stefanie Glinski, *Turkey's Balancing Act Between Putin and the West*, Foreign Policy, March 2023, <https://foreignpolicy.com/2023/03/06/turkey-elections-russia-erdogan-putin-nato/>

2. ENERGY ISSUES, AIMS AND POLICIES

2.1 Türkiye, the EU, and the issue of energy cooperation

Suddenly after the war in Ukraine the issue of energy security has become prominent not just for EU's needs, but also for Turkey's aspiration to become a leading actor in the sector. EU's commitment to diversification from Russian fossil fuels, and the efforts to rely on other energy suppliers, as the United States, Norway, Azerbaijan, Algeria among the others, have strengthened Türkiye's stance and pride on its potential future role as energy trade center.

First in October 2022, Minister Çavuşoğlu declared Ankara's readiness and capacity to be an energy hub for natural gas headed to Europe,¹⁶ which came as a response to Russian President's proposal for creating a gas base in Türkiye to redirect supplies and export them to the European market. Two months later, in December, Energy and Natural Resources Minister Fatih Dönmez said Türkiye aims to shape the project of making the country an energy hub within one year.¹⁷ In this framework lie several moves including the agreement between Türkiye and Bulgaria for the transmission of up to 1.5 billion cubic meters of natural gas a year within the next 13-year period, signed in January 2023,¹⁸ and the resumed talks with Turkmenistan to develop infrastructure for supplying Turkmenistan's gas to Europe.¹⁹

With its geographical position at the juncture of Europe, Caucasus, Central Asia, and the Middle East, Türkiye is already a transit country for the energy market, but transforming into an energy hub needs a lot of work, including "diversification of routes and suppliers; independence in decision-making through an independent institution; market demand and supply that determine prices; and political will of potential partners to get involved in the projects"²⁰. These pillars imply a high degree of liberal approach that seem far to be reached, as of today. Apart from the technical aspects, there are also two major issues to be dealt with, while considering the potential expansion of Türkiye's role in the energy market, namely its energy relations with the EU, and EU's pushing for diversification.

Energy has always been part of EU-Turkey relations, especially considering the EU energy dependency on Russia's gas and Türkiye's dream of becoming a corridor or energy hub. However, over the years, the Turkish-European cooperation on energy did not develop beyond TANAP. Before the war in Ukraine, indeed, the main possible investment from the EU side would have been the opening of the energy chapter in the accession process and, possibly, closing it. The move would have facilitated the process of reforms in Türkiye and anchored Ankara to Bruxelles, with a potential long-term impact. However, things went other way as tensions between the parts arose especially due to internal developments in Türkiye and the issues in the Eastern Mediterranean. Worth mentioning that the last ministerial meeting under

¹⁶ ANADOUL AGENCY, *Türkiye already has capacity to become natural gas hub: FM*, October 2022 <https://www.trtworld.com/turkiye/turkiye-already-has-capacity-to-become-natural-gas-hub-fm-12783533>

¹⁷ ÖZER D. A., *Türkiye aims to shape energy hub project within a year: Minister*, Daily Sabah, December 2022. <https://www.dailysabah.com/business/energy/turkiye-aims-to-shape-energy-hub-project-within-a-year-minister>

¹⁸ Hurriyet Daily News, *Türkiye on its way to become energy hub: Minister*, January 2023. <https://www.hurriyetdailynews.com/turkiye-on-its-way-to-become-energy-hub-minister-179922>

¹⁹ Museyibova N. A., *Turkmenistan Considers Sending Natural Gas Supplies to Europe*, The Jamestown Foundation, May 2023, <https://jamestown.org/program/turkmenistan-considers-sending-natural-gas-supplies-to-europe/>

²⁰ Yevgeniya Gaber, *Turkey can become an energy hub—but not by going all-in on Russian gas*, Atlantic Council, December 2022, <https://www.atlanticcouncil.org/blogs/turkeysource/turkey-can-become-an-energy-hub-but-not-by-going-all-in-on-russian-gas/>

the EU-Türkiye High-Level Energy Dialogue took place in January 2016.²¹ Now, after the Russian aggression and the regained importance of Türkiye for the stability of the region, dialogues could be resumed between Ankara and Bruxelles, bearing in mind, however, that despite the existing Türkiye-Russia cooperation on the TürkStream pipeline project, it is unlikely that Europe will waive its commitment to end its dependency from Russia's energy. In addition, while considering the relevance of the Southern Gas Corridor, it seems that the diversification of supply routes through a pipeline via Türkiye is no longer on the EU's agenda, when looking at the long-term. The EU continue to implement the 55 package and it is still on its way to reach climate neutrality by implementing the Green Deal.

2.2 Prospects for energy relations in the long-term

Both the EU and Türkiye, although for different reasons, are working on two levels, namely diversifying energy partners while continuing their transition into green energy.

While in the short-term there will be a huge need for fossil fuels still playing a strong role in the energy mix worldwide, relations between EU and Türkiye on energy must invest in the long-term perspective.

Thus, even considering that the capacity of TANAP could hypothetically be increased, energy cooperation based on fossil fuels is going to lose its importance and it does not seem possible for Türkiye to write a new page with the EU in the energy field without expanding cooperation on renewables. To achieve decarbonization, energy services currently based on fossil fuels must be replaced by climate-neutral alternatives, and electricity powered by renewables and hydrogen may be essential for this process. For the energy transition to be successful the EU need to meet increased demand for green energy and to do so it needs to rely on its neighbors, including Türkiye. On its side, Türkiye must expand the cooperation focusing on future energy, such as renewable energy and green hydrogen also because decarbonization would be an economic and strategic requirement for Türkiye in terms of trade relations with the EU. The introduction of the CBAM put the Turkish government in kind of urgency to implement the Green Deal Action Plan²², a roadmap to support the green transformation in all relevant policy areas.

However, Türkiye has excellent resources including above average sunlight hours and one of the best wind corridors in Europe, second to Scotland. In this regard, it might be the leading growth area for renewables in Europe and contribute cooperation in the development of renewable energies. Agreements that started with German firm Siemens Gamesa's consortium with Turkish partners that won the first IGW capacity wind tender in Türkiye in 2017 is a good example of political will to develop renewables with European partners and a potential for new FDI or joint projects for European partners.

Briefly, energy transition creates economic opportunities not only for operators, but also for the prosperity and development of the region. The Mediterranean, especially the Eastern Mediterranean, has great potential for green energy, such as wind and solar power, and can become a potential basin for green hydrogen. Also, the Mediterranean is a strategic route for cable data, electricity, together with natural gas. Although there have been many developments on the infrastructure side in recent years, there is still much potential for collaboration and

²¹ *Ibid.*

²² The Green Deal Action Plan of Türkiye published in the Official Gazette dated 16 July 2021, was developed to comply with the policies of combating global climate change and to support green transformation designed in alignment with the European Green Deal. See <https://www.trade.gov.tr/exports/green-action-plan>

cooperation between different countries and stakeholders to invest in energy infrastructure projects that would benefit the whole region, but existing challenges need to be addressed for that to come.

3. TÜRKIYE'S REGIONAL NORMALIZATION: THE CONTINUITY OF AN AMBITIOUS PATH?

3.1 Normalization: the golden line of Turkish agenda

Erdoğan's re-election in May 2023 leads to questions about the future roadmap of Türkiye, especially in terms of foreign policy. Since the main contours of Türkiye's agenda in both the regional and international landscape have been based on Turkish national interests, strategic autonomy and balancing stance between the main international powers, it has to be seen what will become of Türkiye's regional normalization process in the near future, by bearing in mind that also the regional policy of the main international players, including USA, Russia, and Iran, can shape this path.

Starting from the end of 2020 and the beginning of 2021 the Middle East have witnessed unprecedented de-escalation among key regional rivals. After years of tensions Türkiye has been gradually re-approaching with several regional actors including Israel, the UAE, Saudi Arabia, and Egypt. In this regard, it is worth recalling that at the beginning of the Arab Spring Türkiye supported the democratic transformation in the MENA region through its active foreign policy and the West perceived Türkiye as role model for the countries of this region. However, Ankara's backing democratic transformation in the MENA region taking side of the newly elected governments of Muslim Brotherhood deteriorated its relations with the Gulf monarchies and Egypt, who opposed the Muslim brotherhood. The regional balance of power was thus reshaped and to avoid further isolation Türkiye has adopted a more assertive approach in the region.

Türkiye's advocating for regime change in Syria also tightened its relations with Damascus and its defense of the Palestinian cause froze relations with Israel. Türkiye had also long-time dispute with Armenia due to Yerevan genocide claims and its occupation of Nagorno Karabakh. Relations with Greece, traditionally very tense due to a lot of issues, including disagreements on delimitation of territorial waters; the continental shelf and airspace; Cyprus; the hydrocarbon exploration activities in contested waters between Athens, Nicosia and Ankara; the militarization of Greek Islands in the Aegean Sea near to the coastline of Türkiye - that according to Ankara should remain demilitarized according to the 1923 Treaty of Lausanne and the 1947 Paris Peace Treaty; and the mutual accusation of airspace violations, further worsened in the last decade. Moreover, the bilateral agreements signed between Greece and the Mediterranean countries at odds with Türkiye (i.e. Egypt and Israel), resulted in Ankara's isolation from the region and its exclusion from the Eastern Mediterranean Gas Forum.

In the last two years, however, a combination of domestic, regional and international factors has facilitated unexpected "Mediterranean" rapprochement, also involving Türkiye. The Abraham accords; the change in the US administration in 2020; the Al-Ula agreement ending the 2017 Gulf crisis; the economic impact of Covid19, the outbreak of the war in Ukraine and the two earthquakes hitting southeastern Türkiye are among the multifactors that have changed Ankara's foreign policy approach by facilitating the rapprochement with neighboring countries. Therefore, Türkiye did not fall behind the new trend, which is normalization process in the MENA region, as we have witnessed the final version of it when the decades old hostile states - Saudia Arabia and Iran – signed a China brokered deal to repair ties. In this, economic and geopolitical issues have played a crucial role as Türkiye seeks to diversify its economy and exploring new economic partnerships in both regional and international landscapes to ail its economy, to rehabilitate in the eyes of Washington and to improve its position in the Eastern Mediterranean and in the whole region.

3.2 Türkiye- Israel

Türkiye's rapprochement to **Israel**, started during Bennet-Lapid governments, should be read in this framework. Indeed, whether Türkiye-Israel relations have known numerous ups and downs during Erdoğan's power due but not limited to Israeli policies towards Palestinians, within the last two years dialogue was reopened, full diplomatic ties were restored and a boost in security, economic and energy cooperation is underway. Türkiye is important to Israel's security for allowing closer Israeli intelligence monitoring of Iran.²³ In addition, while energy cooperation still needs to be explored, including the chance for the setting of a natural gas pipeline carrying Israeli gas to Türkiye, Israel has proven to be a profitable partner in terms of economic cooperation. Indeed, according to the United Nations COMTRADE database on international trade, Türkiye export to Israel was US\$7.03 Billion during 2022, compared to US\$4.7 of 2020.²⁴ Furthermore, with regard to tourism, there has been a boost in exchanges with 632,000 Israelis visiting Türkiye in the period between January and September 2022, an increase of 448% compared to the previous year, according to Al-Monitor.²⁵ In this framework, it is of outmost importance the 2022 aviation agreement between the two countries, paving the way for Israeli airlines to resume flights to Türkiye.²⁶

While considering the future of Türkiye-Israeli normalization path with due caution under Netanyahu's leadership, the moves close to and after Erdoğan re-election suggest the process is still underway. By now and even after the Israeli operations in Gaza and the tensions around the holy places in Jerusalem during the last few months, relations have not deteriorated²⁷ and both President Herzog and PM Netanyahu were among the first leaders to congratulate Erdoğan's victory, expressing their hope for further deepening relations between the two countries.²⁸

3.3 Türkiye- Gulf Monarchies

With interdependence and stability becoming the basis of regional rapprochement, Türkiye has also nurtured relationships with other actors of the Middle East and Gulf chessboard.

As of the UAE, the two parties have been exchanging high level bilateral visits since 2021, soon after the resolution of the Gulf crisis. It is no coincidence that this happened not long after the UAE-Tel Aviv rapprochement, namely with the US-backed Abraham Accords, that also opened the UAE a window for potential opportunities in the Eastern Mediterranean. In the edge of US 'disengagement' from the region the bilateral agenda between UAE and Türkiye has thus been centered on the need to diversify partners and allies, and on the mutual advantages on trade, investments, and business relations. Both countries have signed a lot of agreements on defense and security, but most importantly cooperation strengthened on the economic ground. In 2022, trade between the two countries reached \$19 billion²⁹. In March 2023, Türkiye and the UAE agreed on a

²³ See Steven A. Cook, *How Israel and Turkey Benefit From Restoring Relations*, August 2022, <https://www.cfr.org/in-brief/how-israel-and-turkey-benefit-restoring-relations>

²⁴ See <https://comtradeplus.un.org/>

²⁵ See Rina Bassist, *Israel quick to congratulate Turkey's Erdogan, expects boost in ties*, Al Monitor, May 2023. <https://www.al-monitor.com/originals/2023/05/israel-quick-congratulate-turkeys-erdogan-expects-boost-ties>

²⁶ DAILY SABAH, *Israel ratifies aviation deal with Türkiye in 'strategic step'*, September 2022. <https://www.dailysabah.com/business/transportation/israel-ratifies-aviation-deal-with-turkiye-in-strategic-step>

²⁷ See Amos Yadlin, Pazit Ravina, Nimrod Goren, *Turkey-Israel Relations on the Upswing*, The Jerusalem Strategic Tribune, June 2023, <https://jstribune.com/turkey-israel-relations-on-the-upswing/>

²⁸ See Rina Bassist, op cit.

²⁹ İbrahim Karataş, *The Gulf's Spirit of Rapprochement Grips Turkey and the UAE*, The Gulf International Forum, <https://gulfif.org/the-gulfs-spirit-of-rapprochement-grips-turkey-and-the-uae/>

trade deal aiming to increase their mutual trade volume³⁰. A commitment that was confirmed after Türkiye presidential election. At the beginning of June, the two governments ratified the Comprehensive Economic Partnership Agreement, with the goal of increasing bilateral non-oil trade to exceed \$40 billion annually over the next five years.³¹

The al Ula Accords as well as the full re-engagement between Türkiye and the UAE also paved the way to easing relations between Ankara and Riyadh, heavily worsened after the murder of Saudi journalist Jamal Khashoggi in the kingdom's Istanbul consulate in October 2018. After the halt of the trial in absentia of Saudi suspects accused of playing a role in the journalist's murder and the case transfer to the Kingdom³², Erdoğan visited Saudi Arabia for a landmark visit in April 2022, seeking financial support during a domestic crisis fueled by the collapse of its currency and soaring inflation³³. Then, in June 2022 Mohammad Bin Salman visited Türkiye to fully restore ties. The volume of bilateral trade between Türkiye and Saudi Arabia jumped from SR17 billion (\$4.52 billion) in 2017 to SR23 billion in 2022,³⁴ with key sectors demanding more attention such as trade, business, investment, tourism, energy, infrastructure, technology, and defense. Indeed, relations could be facilitated with Türkiye economic recovery and shared investments, also in the light of Saudi's diversification agenda 'Vision 2030'. Türkiye can thus play an important role for GCC economies across many sectors, from entertainment to tourism, food production and construction and for the transition from hydrocarbons.³⁵

Following these premises, in March 2023 the Saudi Fund for Development announced to deposit \$5 billion in the Central Bank of Türkiye to support Türkiye's efforts in boosting economy³⁶. Also, to cement ties, oil giant Saudi ARAMCO met with around 80 Turkish contractors to discuss \$50 billion worth of potential projects in the kingdom including planning refinery, pipeline, management buildings and other infrastructure construction.³⁷

3.4 Türkiye – Egypt

When it comes to **Egypt**, at odds with Türkiye since Sisi's raise to power in 2013, and for a variety of reasons from the Lybian dossier to the competition on the Eastern Mediterranean, recent high level bilateral visits have signed the path for rapprochement. On the one hand, Egypt is in deep need of economic support and Türkiye can play a role in rehabilitating its state budget considering Anakara's role as top importer of Egyptian gas. The trade exchange between Türkiye and Egypt stands at around

³⁰ AL MONITOR, *Turkey, UAE ink free trade deal in latest thaw*, March 2023, <https://www.al-monitor.com/originals/2023/03/turkey-uae-ink-free-trade-deal-latest-thaw>

³¹ Khatam Al Amir, *UAE, Turkey sign comprehensive economic partnership agreement*, Gulf News, June 2023, <https://gulfnews.com/business/economy/uae-turkey-sign-comprehensive-economic-partnership-agreement-1.1685564108191>

³² Giorgio Cafiero, *The Significance of Mohammed bin Salman's Trip to Turkey*, American Security Project, June 2022 <https://www.americansecurityproject.org/the-significance-of-mohammed-bin-salmans-trip-to-turkey/>

³³ AL JAZEERA, *Erdogan meets Saudi leaders in first visit since Khashoggi murder*, April 2022, <https://www.aljazeera.com/news/2022/4/28/turkeys-erdogan-to-visit-saudi-arabia-relations-warm>

³⁴ ARAB NEWS, *Saudi-Turkiye trade volume to reach \$10bn in coming years, says Turkish minister*, March 2023, <https://www.arabnews.com/node/2271536/business-economy>

³⁵ See Emily Milliken and Giorgio Cafiero, *What does Erdogan's re-election mean for Turkey-Gulf relations?*, Al-Jazeera, June 2023, <https://www.aljazeera.com/news/2023/6/6/what-does-erdogans-re-election-mean-for-turkey-gulf-relations>

³⁶ AL SHARQ STRATEGIC RESEARCH, *A Saudi Deposit and an Emirati Economic Agreement: Turkey Strengthens its Partnership with the Gulf States*, March 2023, <https://research.sharqforum.org/2023/03/14/a-saudi-deposit-and-an-emirati-economic-agreement-turkey-strengthens-its-partnership-with-the-gulf-states/>

³⁷ Jack Dutton, *With Saudi Aramco's \$50 billion deal, Turkey seeks less dependency on West*, June 2023, <https://www.al-monitor.com/originals/2023/06/saudi-aramcos-50-billion-deal-turkey-seeks-less-dependency-west>

\$9.2bn with concrete prospect for growing.³⁸ On the other, the normalization with Egypt might unlock challenges in Lybia and, according to some, Türkiye's positioning in the Eastern Mediterranean.

3.5 Türkiye – Greece – Cyprus

Some optimism for a kind of development in the traditional Eastern Mediterranean dynamics that isolated Türkiye into *a one against all* competition, has spread out following the regional response to the earthquake that hit Türkiye last February. So thus, in the so-called earthquake diplomacy, rivals extended their hand to Türkiye, including **Greece**, which was among the first to send aid, opening some hope for cooperation between the two. In his visit to Hatay in February, the then Greek Defense Minister Nikos Panagiotopoulos announced that Greece and Türkiye agreed to develop an agenda based on good neighborly relations³⁹ and this positive stance was confirmed by the decision to cancel their scheduled military exercises in the Aegean Sea to hold small-scale training instead. With earthquake diplomacy undoubtedly warming ties between the two traditional competitors and facilitate de-escalation, the issues troubling the Aegean, including but not limited to the Cyprus issue, the disagreements on delimitation of maritime waters, and the status of the Dodecanese islands, among the others, remain pending and a matter of concern for both the EU, which have two member States involved vis a vis a candidate country, and the USA who is NATO ally to both. For them to be solved indeed, together with the Parties' willingness, the issues around the Greece-Cyprus-Türkiye disputes need more than a bi/or/trilateral effort.

3.6 Türkiye – Armenia

With Türkiye's role in the Eastern Mediterranean remaining an open scenario, Ankara's positioning in the Caucasus, the other energy-rich area of the region, is improving. **Armenian** Prime minister Pashinyan attended President Erdogan inauguration ceremony is the latest sign of a thaw between the two. Already in December 2021, a year after Armenia's defeat in the Nagorno-Karabakh war, the two countries appointed special envoys to help normalize relations.⁴⁰ Moreover, in 2022, Türkiye and Armenia resumed their first commercial flights in two years.⁴¹ Reasons facilitating this rapprochement are many, including the outbreak of the war in Ukraine, which resulted into the collapse of any deterrence potential on the Russian side and in the deepest crisis between Yerevan and Moscow. The wider regional context might now be favorable and provide better chances of success for the normalization process as a win-win solution for all, with Türkiye deepening its regional influence and securing stability at its borders.

3.7 Türkiye – Syria

³⁸ See Mohamed Samir, *Turkey-Egypt trade exchange can rise to \$20bln within 10 years: Turkish Charge d'Affaires in Cairo*, Zawya, April 2023. <https://www.zawya.com/en/economy/north-africa/turkey-egypt-trade-exchange-can-rise-to-20bln-within-10-years-turkish-charge-daffaires-in-cairo-bv2ay5ct>

³⁹ Tasos Kokkinidis, *Greece and Turkey Cancel Military Exercises in the Aegean*, Greek reporter, May 2023 <https://greekreporter.com/2023/05/30/greece-turkey-cancel-military-exercises-aegean/>

⁴⁰ See <https://english.alarabiya.net/News/world/2023/06/02/Armenian-PM-to-attend-Erdogan-s-inauguration-Armenian-government>

⁴¹ *Ibid.*

Last 22 June in Astana, it was declared that the main goal of the Astana group, which in 2017 brought together Russia, Iran and Türkiye to find a solution to the long-standing Syrian war, can be considered achieved for what concerns the creation of de-escalation zones and the end to the bloodshed. A declaration which, albeit surprisingly, placed the emphasis on the importance of the stabilization process, on the constructive spirit of the parties and on the need for a road map for full restoration of Türkiye-Syrian relations⁴². However, nowadays not only divergent interests remain in Syria, but new pockets of tension are emerging. Although Damascus supports the need for Türkiye to produce a road map for its withdrawal from Syrian territories, there are many open challenges. Indeed, despite the rehabilitation of Syria in the Arab League and the recognition of Syrian territory sovereignty, the presence of Türkiye and the United States in the North and Northeast of the country make normalization process a slipper terrain, also for the much-debated issue of voluntary returns. While considering that Türkiye is a hosting country, with 3,7 million Syrians in its territory, in recent years the fragile economic situation and the growing problems of social inclusion increased intolerance episodes and tensions against refugees. That was a highly debated topic in the recent Turkish presidential elections, which brought to light not only the nationalist spirit of the country but also the willingness to repatriate Syrians as a way for appeasing internal tensions. According to estimates, Türkiye has already repatriated around 553,000 Syrians⁴³ but the sustainability of the voluntary returns in the long term is unfeasible without Syria's commitment for security guarantees to the returnees and without the building of a secure environment. By now, many doubts arise regarding the full stabilization of the country and normalization of relations. Russia is still controlling Syrian aerospace and there are still many Iran backed groups supporting Damascus military operations against the opponents. According to the Syrian Observatory on Human Rights (SOHR) escalations have been recently recorded in Idlib canton, where Russia and Türkiye created a buffer zone, along 2018 Sochi agreements⁴⁴. In other words, it seems that the hostilities have gained a new momentum with Russian air operations against some groups supported by Ankara against Damascus. Moreover, the Iranian militias are reinforcing their post around Deir az-Zor, where also US, that in Syria grants armed support to pro-Kurdish groups of the YPG, recognized by Ankara as a sister organization of the PKK and a threat to its own security- moved some patrollings. Syrian is therefore a chessboard with very fragile balances where the potential of conflict is still very high.

⁴² <https://www.aa.com.tr/en/middle-east/astana-meeting-on-syria-stresses-importance-of-turkiye-syria-normalization/2927879>

⁴³ <https://www.aa.com.tr/en/middle-east/more-than-550-000-syrians-returned-to-areas-cleared-of-terrorism-turkiye/2906905>

⁴⁴ V. Giannotta, 'L'accordo Erdoğan Putin dopo la crisi di Idlib', Osservatorio Turchia, CeSPI, https://www.cespi.it/sites/default/files/osservatori/allegati/brief_6_turchia-russia_idlib.pdf

4. SOME CONCLUSIONS AND POLICY RECOMMENDATIONS TO THE EU AND ITALY

4.1 *Rome, natural and necessary interlocutor*

Despite Türkiye-EU accession process seems at a deadlock, mainly due to the pending Cyprus issue and to the increasing concerns over Turkish governance and rule of law, there are several areas of cooperation. Some of these, such as the liberalization of entry visas for Turkish citizens in the European area and the modernization of the Customs Union, are well-known issues as they have already been set as conditions of the so-called 'Refugee Agreement' signed in 2016 and yet not satisfied. Indeed, it was that agreement which has opened the doors for transactional relations between Ankara and Brussels, as they concern very specific sectors.

However, the knot to unity is the nature of the future relationship between Türkiye and the European Union in the light of the military and technical support granted to Ukraine, above all through the supply of Turkish drones. On the other hand, the diplomatic action launched by Ankara aiming at mediating in the conflict should not be underestimated. In the light of a future European defensive architecture, the inclusion of Türkiye, which has already been EU candidate and NATO member, would therefore look appropriate. In this regard, remains unknown how sustainable Türkiye's *Two-Chairs* approach may be. Although it is justified by the defense of Turkish national interest, it does not always look compatible with multilateral logics and constraints.

Hence, due to the longstanding mistrust and sense of frustration affecting Ankara-Bruxelles relations, for a genuine dialogue and a healthy mutual understanding, Italy can play a crucial role. Italy-Türkiye ties are strategic as they pivot not only on a deep sense of friendship, but also on many complementarities. Over time Italy and Türkiye have always maintained good bilateral relations, not only in economic terms (Türkiye is the Italian main trade economic partner in the Mediterranean region), but also at political level. The contacts have been very frequent, and they have never been interrupted, despite the changes occurred in the Italian government in the past three years. Furthermore, Italy has appreciated Türkiye's mediation role between Russia and Ukraine and its important diplomatic action in the Grain deal that aims to prevent food crisis following the outbreak of the war in Ukraine. In this regard, Rome arises as a natural and necessary interlocutor in channeling Türkiye's demands on the tables of the EU as well the European requests towards the Turkish partner.

As Rome and Ankara face same challenges and opportunities coming from the region, for Italy it is important to keep the dialogue open and strong with Türkiye not only at bilateral level, but also in the European frame. Encouraging Türkiye and the other regional countries in the path for normalization is seen as beneficial for the stability of the entire region. This is not just matter of security concern, but it also entangles the need for sustainable and resilient global supply chains where Türkiye stands as a valuable actor in the logistic reshaping.

4.2 *A concrete positive agenda*

On its side, the European Union is called to engage with Türkiye in a Positive Agenda with concrete options that could be beneficial for all sides. Apart from keeping on track and strengthen bilateral relations, Italy can play a constructive role within the EU and for the improvement of EU- Türkiye relations. It should be noted that the positive impact of the Positive Agenda adopted in 2021 was quite limited. From time to time, efforts to revitalize the relations between the EU and Türkiye with a positive agenda on certain issues resulted in not achieving the desired level of progress in this process

where there was no full membership perspective. Briefly, Positive agenda might pave the way for improvement of stagnated relations between Türkiye and the EU, but the full membership perspective has a greater motivational effect. Besides entangling the issues of visa liberalization, updating the Customs Union and adopting shared and sustainable approach on migration, Italy may also propose the resuming of the negotiation process. This may pivot on the opening of some chapters of crucial importance, such as the ones related to the rule of law and democratic maturity of Türkiye (Chp.23;24), as well as Energy (Chp.15). This might stimulate the reform process in Türkiye and pave the way for improvement of the EU and Türkiye relations, which has positive impact on Türkiye and Italy relations as well as on Türkiye relations with the region, where the margin of cooperation rather than friction with EU are many.

4.3 Green energy cooperation

Considering that “the EU cooperates with Türkiye to enable the integration of the Turkish gas and electricity markets into its internal energy market and to support the country in reaching its 2053 net zero emission targets”⁴⁵, the EU should support the decarbonization process of the energy sector in Türkiye. Moreover, solid political relations between the two and an ambitious environmental policy for Türkiye will be necessary to achieve this. The distrust between Türkiye and the EU unfortunately is an important factor in affecting relations, especially when it comes to long-term projects and cooperation that create significant dependency. Establishing long-term political trust between the EU and Türkiye is, indeed, crucial before deepening relations and cooperation, also in the energy and environmental sectors. The Green Deal is an area in which the future relations between the EU and Türkiye could strengthen with decarbonization potentially become the central element of the debate on the EU-Türkiye Customs union and its potential and much needed modernization. Moreover, as Italy particularly welcomed Türkiye's decision to join the Paris Agreement, this opens margin for strenghtening the cooperation at any level, including through the resumption of High-level dialogue on energy. Indeed, the full potential of the excellent relationship between Italy and Türkiye depends also on the good relations between the European Union and Türkiye.

4.4 An Omni-comprehensive approach for the Eastern Mediterranean

Indeed, concerning Greece and Türkiye, anything that the EU can do to manage the Eastern Mediterranean disputes would be very helpful in an area where the US has been less effective. This implies an omni-comprehensive approach that do not exclude Turkish claims, but that addresses it in constructive way. This means encouraging bilateral relations, trying to avoid new escalations. Italy may act as *trust builder* among the parts. However, as Cyprus issue is one of the major Eastern Mediterranean disputes, a balancing act of Italy and the EU and the UN between Türkiye, Greece, Greek Cypriot Administration and the Turkish Northern one, seems necessary for the improvement of the EU-Türkiye relations as well as for developing the full potential of an area which is of interest of all the actors involved, both in terms of energy security and regional stability.

⁴⁵See https://energy.ec.europa.eu/topics/international-cooperation/key-partner-countries-and-regions/turkiye_en

4.5 Issue-based cooperation

Issue-based cooperation might be used in the Eastern Mediterranean as a way to build up trust between rivals. Indeed, recent history showed that states that officially do not recognize each other, as Lebanon and Israel, found space for cooperation on the energy field. However, for that to come, when it comes to Greece, Cyprus and Türkiye, obstacles are many and the efforts to build up cooperation and to make it sustainable needs a lot of work and commitment. Problems are not just circumscribed to the division of Cyprus but also to the fact that Northern Cyprus is not recognized at international level and that Türkiye's claims for the delimitation of maritime waters are not in line with the International Law of the Sea. Going beyond at least one of these issues is very difficult as of their interconnection. There is a need of multilateral efforts for them to be solved. In this regard, some negotiated openings from the EU to Türkiye might be taken into account. Furthermore, the EU and Italy could help trying to reunite the littoral States of the Eastern Mediterranean as a way to start opening dialogue, encouraging Mediterranean cooperation mechanisms for a joint use of resources and revenue sharing, especially in terms of renewables.

4.6 Balkans as part of the game

In the European frame, the Balkans should not be considered as a region out of the Eastern Mediterranean and East-Med related energy policies. There are special risks especially for states in the Balkans that locked in ethno-nationalist disputes in this region and vulnerable to Russia's meddling policies. Türkiye's stronger political relations and defense cooperation with Balkan countries and its mediation efforts in this region cannot only contribute to stability and peace in the Balkans, but also can serve to Europe and Italy's efforts for energy security.

4.7 The role of business

Italy-Türkiye economic and business complementarities are very strong. As has been shown by the surveys conducted by CeSPI Osservatorio Turchia on the degree of satisfaction of Italian investors in Turkey, relations are cemented on a deep trust in the business sector⁴⁶. This factor could act as a driving force for further coordinated actions in third countries as well. Italian companies are playing an important role in the Black Sea gas field project of Türkiye. This energy cooperation between Türkiye and Italy can be extended other areas such as renewables. It is worth noting that Türkiye has maintained a strong relationship with Italy in the energy sector, not only in terms of hydrocarbons but also in forward-looking renewable energies, new technologies, and innovation. Italy has specific expertise in renewable energy that could share; it may bring not only economic benefits but also political advantages for both countries. Moreover, as mentioned earlier, Türkiye competitive resources including above average sunlight hours and one of the best wind corridors in Europe. It means Ankara has potential to develop joint projects with Italy and Europe on renewable energy. Therefore, there is huge potential for developing more interdependencies by serving the needs of each market.

⁴⁶ IXE, *Indagine sulle imprese italiane che operano sul mercato turco*, CeSPI-Turkey Observatory, December 2021, https://www.cespi.it/sites/default/files/osservatori/allegati/ixe_cespi_turchia_dic21_def.pdf