

# Italy and Turkey's Europe-to-Africa Commercial Corridor: Rome and Ankara's Geopolitical Symbiosis Is Creating a New Mediterranean Strategic Paradigm

A geopolitical symbiosis between Italy and Turkey is creating a Turkey-Italy-Tunisia transportation corridor that promises to reconfigure the patterns of trade between Europe, Africa, and the Middle East. Slicing across the center of the Mediterranean basin, the Turkey-Italy-Tunisia corridor forms an arc of commercial connectivity from the Maghreb to the wider Black Sea. The corridor's central hub is Italy's deep-sea port of Taranto, located on the Italian peninsula's southern tip in the strategic heart of the Mediterranean Sea. Managed by Turkish port operator Yilport, the Taranto port began servicing the Turkey-Italy-Tunisia corridor in early July 2020. The Taranto-Tunisia segment simultaneously forms the core link of the corridor's Europe-to-Africa transport route, by connecting North Africa's coast to the manufacturing centers of Italy, Germany, and northern Europe via Italy and Europe's high-speed rail systems. From Tunisia's ports, the corridor can also link via Algeria to the Trans-Saharan Highway, potentially extending Italy and Turkey's Europe-to-Africa corridor southward into West Africa as far as Lagos, Nigeria.

Incorporating Malta and Tunisia as key transit nodes, the corridor is also giving rise to a new Italo-Turkish-led geopolitical alignment anchored in the central Mediterranean basin. The new alignment is a geopolitical achievement for Italy's rebalancing toward the wider Mediterranean basin where Rome has exerted its strategic autonomy, particularly in its pivot to Africa. In challenging France's dominance in Africa, Italy has developed a mutually beneficial relationship with Turkey, which has concurrently sought to increase its influence in Africa. Creating a new strategic paradigm for Mediterranean geopolitics, the symbiosis between Rome and Ankara

has found its most robust expression in the effort to create Afro-Mediterranean connectivity via the central Maghreb – an effort now augmented by the entrenchment of Turkish hard power in Libya.

## **Italy's *Mediterraneo Allargato* Strategy and its Pivot to Africa**

While Italy maintains its traditional three foreign policy pillars – Europeanism, Atlanticism, and Mediterraneanism, Rome has been attempting to advance its global profile by becoming a central actor in the wider Mediterranean basin. Italy's strategic framework views the Italian peninsula as the centerline around which exists a horseshoe-shaped geopolitical continuum, termed *il Mediterraneo allargato* ('The enlarged Mediterranean'), formed by the Maghreb and the Horn of Africa on one side of the horseshoe and by the Balkans and Middle East on the other. Rome's strategic priority to expand its economic and political presence in the regions of the *Mediterraneo allargato* constitutes a central organizing principle for Italy's foreign relations.

Rome's rebalancing to the *Mediterraneo allargato* has resulted in Italy's pivot to Africa, with greater active involvement in the Maghreb, the Sahel, and the Horn of Africa.<sup>1</sup> In January 2018, when Italy reassigned troops deployed in Iraq and Afghanistan to missions in Libya and Niger, then Italian Defense Minister Roberta Pinotti famously explained Italian strategic priorities: "the heart of our interventions is the *Mediterraneo allargato*, from the Balkans to the Sahel, to the Horn of Africa."<sup>2</sup>

Placing Italy at the center of a nexus of Mediterranean commercial routes connecting Europe with Africa and the Middle East has been the primary driving force

of Italy's foreign policy reorientation and its exercise of strategic autonomy. For the past two decades, Italy's trade with the Mediterranean region has shown robust growth, with Italy's exports to Mediterranean markets outstripping Italian exports to the United States and China respectively.<sup>3</sup> Italy's strategic imperative, to expand and diversify its commercial connectivity in the *Mediterraneo allargato*, transcends the ideologies of the particular political parties in government. Noting the structural nature of Italy's *Mediterraneo allargato* agenda, leading Italian defense expert, Alessandro Marrone, observed: "The main issue is the maritime trade routes accessed by Italy's ports, an important avenue for the global import–export trade of Europe's second most important manufacturing economy and a crucial element in Italy's GDP."<sup>4</sup>

## **Italy and Turkey's Strategic Symbiosis in the Mediterranean**

Italy's *Mediterraneo allargato* orientation enjoys a strategic synergy with Turkey's own drive to develop inter-regional connectivity in the roughly overlapping geographical space defined by the former territories of the Ottoman empire. Italy has long been among the strongest advocates of closer EU-Turkey relations and the two enjoy a very robust trade relationship. After Germany, Italy forms the largest European market for Turkish exports, garnering Turkey \$9.53 billion in revenue in 2019.<sup>5</sup> With the exception of a conflict of interests concerning Cypriot offshore natural gas development, which the two countries have managed to compartmentalize, Italy and Turkey share a broad set of common interests across the wider Mediterranean basin, from the Balkans to North Africa and the Horn of Africa.

Within the Italian-Turkish symbiosis, commercial connectivity with the central Maghreb states Tunisia, Algeria, and Libya forms a core shared interest between Rome and Ankara as both seek to develop a greater economic presence in North Africa and the rest of the continent. Despite Italy's proximity to the North African coast, France remains the dominant foreign actor in the Maghreb, a region that is increasingly becoming an overland gateway for Euro-Africa commercial relations with the widespread expansion of high speed road networks across the continent. While Italy has surpassed France in becoming Europe's second largest manufacturer, whose value of sold production exceeds France's value by approximately one-third,<sup>6</sup> the development of Italy's economic relations in North Africa and the rest of Africa are constrained by France's outsized influence on the pattern of Afro-Mediterranean commercial connectivity.

French manufacturing value-chains dominate the emerging Morocco-based Africa-to-Europe commercial corridor.<sup>7</sup> Despite Italy's burgeoning trade with Egypt and the leading role of Italian energy major Eni in the development of Egypt's natural gas industry, Italy's influence in Egypt is constrained by France's strong security relationship with Egypt. France is Egypt's third largest weapons supplier<sup>8</sup> and maintains a naval base on the coast of Egypt's close strategic partner, the United Arab Emirates (UAE). Paris has also engaged in covert cooperation with Egypt and the UAE to support General Khalifa Haftar's forces in eastern Libya against the western Libyan Government of National Accord (GNA) supported by Italy and Turkey. The Franco-Emirati-Egyptian partnership was put on prominent display in late August 2020 with concurrent Franco-Emirati-Greek joint air force exercises and Franco-Egyptian-Greek joint naval exercises, in support of Greece in its eastern Mediterranean stand-off with Turkey.

Turkey faces an even more formidable challenge in the Mediterranean basin from its systemic rivals France and the UAE. From 2010 to 2016, Ankara opened 26 embassies in Africa as part of its push

to expand Turkey's economic and political footprint across the continent.<sup>9</sup> Despite making significant trade and investment inroads in Africa, Turkey's ability to establish its own inter-regional commercial connectivity via North Africa is stymied in the western Mediterranean by Morocco and in the eastern Mediterranean by Egypt – both of whom share deep economic and military ties with France and the UAE. Turkey's overt military intervention during the first half of 2020 to preserve Libya's GNA has created an important strategic beachhead for Turkey in the central Maghreb. By reversing the course of Libya's civil war through empowering the Tripoli-based government against opposition forces backed by Egypt, the UAE, France, and Russia, Turkey has cemented its status as a major power in North Africa. Ankara's considerable air force presence at the re-captured al-Watayah air base, located 27 km from the Tunisian border, and its developing naval presence in the GNA coastal stronghold of Misrata have increased Ankara's clout in Tunis as well as in Algiers. Turkey's new outsized military presence in Libya now serves as a platform from which Ankara can promote Afro-Mediterranean connectivity via the central Maghreb states in conjunction with Italy, which also backed the GNA and runs a military hospital in Misrata.

However, until Libya's security environment sufficiently stabilizes and the Tripoli-Ndjamena segment of the Trans-African Highway system's TAH-3 route is completed, Turkey and Italy's only option for creating a Europe-to-Africa commercial corridor through the Central Maghreb is via Algeria's segment of the Trans-Saharan Highway,<sup>10</sup> accessed via Tunisia's ports.<sup>11</sup>

Consequently, one month into Turkey's game-changing Libya intervention, Turkey's President Recep Tayyip Erdoğan visited Algeria on January 26, 2020 as part of a 3-country trip to Africa that included Senegal and Gambia, two of Africa's 'economic tigers' with which Turkey has been expanding its commercial relations. Ankara has already started to make a strong bid for a strategic presence in Algeria through Turkey's \$3.5 billion dollars of investments,

ranking Turkey as one of the country's top foreign investors.<sup>12</sup> Announcing a goal of raising Turkey-Algeria bilateral trade to \$5 billion and calling for a free trade agreement, Turkey's president declared Algeria as "one of our strategic partners in North Africa", explaining that "Algeria is one of Turkey's most important gateways to the Maghreb and Africa."<sup>13</sup>

Italy is Algeria's overall largest trade partner as well as Algeria's largest export market.<sup>14</sup> Rome has long promoted trilateral energy interconnectivity between Algeria, Tunisia, and Italy, the most emblematic symbol of which is the Trans-Mediterranean (Transmed) natural gas pipeline. Owned jointly by Eni and Algeria's state-owned oil company Sonatrach, the 2,475 km Transmed pipeline is one of the longest in the world, spanning Algeria, Tunisia, Sicily, and the Italian mainland.<sup>15</sup> Eni, Italy's largest company by revenue, has extensive oil and natural gas operations in Algeria in partnership with Sonatrach. In July 2020, the two firms signed a wide-ranging breakthrough agreement to expand joint exploration and development.<sup>16</sup> The electricity grids of energy-rich Algeria, Tunisia, and Italy similarly are scheduled to become interconnected in 2025 upon the completion of a 192 km-long, 600MW undersea cable between Tunisia and Sicily.<sup>17</sup>

Mirroring its efforts at creating Italo-Tunisian-Algerian energy interconnectivity, Italy has literally laid the groundwork for the expansion of the Turkey-Italy-Tunisia corridor's extension to Algeria. Over the past decade, Italy's leading construction firms have been deeply involved in the modernization of Algeria's road system, including the mega-project East-West highway traversing the entire length of Algeria parallel to the country's coast. Italy's Anas International and ITALCONSULT are building the 399 km eastern most segment that runs from Bordj Bon Arreridj to the Tunisian border.<sup>18</sup> The upgrade accounts for over half the 783 km distance between Tunisia's port of Bizerte, the Turkey-Italy-Tunisia corridor's African landfall, and Algiers, the northern starting point of the Trans-Saharan highway.

### Italy and Turkey's Europe-to-Africa Corridor

The Turkey-Italy-Tunisia commercial corridor is a multi-modal transportation arc that carries the potential to become an organizing principle for commercial connectivity between three continents. The core connectivity arc stretches from Turkey's major ports on the Aegean to the corridor's central node at Taranto and, from there, to Malta and the ports of Biserte and Sfax in Tunisia.<sup>19</sup> Leveraging the Italian peninsula's geographic position and Italy's high-speed rail system with its connections to the wider European rail network, the corridor has a north-south axis connecting North Africa to major manufacturing and commercial centers of Europe. Connected to five active rail platforms that link directly to Italy's national rail service, cargo delivered at Taranto can reach Milan within 9 hours and Frankfurt and Stuttgart within 17 hours.

The Taranto-Malta maritime link is also supported by the European Union as the southernmost link in the EU's own "Scandinavian-Mediterranean Corridor," one of the nine core network corridors of the European Commission's Trans-European Transportation Network, or TEN-T, program.<sup>20</sup> TEN-T's Scandinavian-Mediterranean Corridor is the central north-south transportation artery of the European Union, a route spanning the Scandinavian peninsula, Denmark, Germany, Austria, Italy, and Malta. Because the Turkey-Italy-Tunisia corridor's Taranto-Malta segment was previously designated as TEN-T's Scandinavian-Mediterranean corridor's southern terminal link, Italy and Turkey have become the gatekeepers of what may become the most prized Europe-to-Africa corridor. By interconnecting the EU's Scandinavian-Mediterranean Corridor with Africa's Algeria-to-Nigeria Trans-Saharan Highway, the Turkey-Italy-Tunisia corridor potentially forms the vital link for the creation of a mega-corridor spanning Europe and Africa from 60° N. latitude to 6° N. latitude.

The Turkish port operator Yilport is the commercial juggernaut that is assembling the transformative connectivity of the

Turkey-Italy-Tunisia corridor. Yilport is a subsidiary of the private family-owned group Yildirim Holding Inc. headed by its visionary chairman Robert Yüksel Yildirim. On July 30, 2019, Yilport entered into a 49-year concession agreement to operate the Taranto port. Although a thriving industrial center during the twentieth century, Taranto declared bankruptcy in 2006, staying in receivership for almost four years. The troubled port changed hands a few times<sup>21</sup> until Yilport's 2019 acquisition.

With a vision to transform Taranto's Container Terminal into "a gateway terminal and also a transshipment hub of tomorrow,"<sup>22</sup> Yilport has committed a total of €400 million for the terminal's renovation and expansion.<sup>23</sup> Although delayed by three months due to the outbreak of the COVID-19 pandemic, the container terminal's phase 1 development was completed in summer 2020. The terminal at Taranto is able to serve ultra large container vessels with -16.5 meters draft and offers 160,000 sq. meters of container freight station and empty container services area.<sup>24</sup> Yilport's development program envisions an ambitious expansion of Taranto's capacity to 4 million twenty-foot equivalent units (TEU) by 2028.<sup>25</sup> As Robert Yüksel Yildirim noted at the July 30, 2019 signing ceremony, "being able to enter Italy and work here in Taranto is like filling in the missing piece of a puzzle that we are building globally."<sup>26</sup>

Connecting the pieces of the Turkey-Italy-Tunisia corridor is CMA CGM, the world's fourth largest container transportation and shipping company, in which Yilport chief Robert Yüksel Yildirim is a 24% stakeholder.<sup>27</sup> CMA CGM began service to the Taranto port on July 10, 2020, marking the resumption of container traffic at Taranto after a five-year hiatus. Taranto is poised to become the geographic crown jewel in CMA CGM's TURMED service that already links Turkey and Tunisia via Malta.<sup>28</sup> Eight years before Yilport's Taranto acquisition, the Turkish port operator acquired a 50 percent stake in Malta's Freeport Terminal at the Marsaxlokk port on the southern coast of the island.<sup>29</sup> Occurring within the same time frame that Yildirim acquired his share in CMA CGM, Yilport's 2011 Malta acquisition

was the Turkish company's first expansion beyond regional operations. Roughly equidistant between Taranto and Tunis, Yilport's Malta terminal forms an important logistics center for the Africa-to-Europe segment of the Turkey-Italy-Tunisia corridor.

### A Paradigm Shift in the Geopolitics of the Wider Mediterranean

Although still in its initial stages, the Turkey-Italy-Tunisia corridor has already begun to rewrite the geopolitical rules of the Mediterranean basin, as witnessed by the shifting positions of Malta and Tunisia. Located equidistant from Tripoli and Tunis, Malta has been drawn into a security partnership with Turkey as Ankara builds up its presence in Libya. In late January 2019, during the initial phase of Turkey's Libya intervention, a Turkey-Malta Business Council summit convened in Istanbul and called for boosting Turkey-Malta bilateral trade to \$1 billion.<sup>30</sup> While the summit highlighted the economic potential of Malta and Turkey's efforts to create Afro-Mediterranean connectivity,<sup>31</sup> Turkey's Vice-President Fuat Oktay also gave voice to the growing security dimension of the Turkey-Malta relationship, suggesting "the defense and security sectors in particular" were "strategic areas" for enhancing Turkey-Malta cooperation.<sup>32</sup> By May 2020, Malta withdrew from *Operation Irini*, the EU's naval effort to enforce the UN arms embargo on Libya, which can potentially impede Turkey's sea delivery of weapons to the GNA.<sup>33</sup> Subsequently, Turkey and the GNA have engaged in close security cooperation with Malta concerning illegal migration and illicit trafficking.<sup>34</sup>

While Tunisia has been careful to maintain a strict neutrality in the Libyan civil war, officially refusing to allow Turkey to establish operational facilities on its soil,<sup>35</sup> Tunisia similarly has been drawn into a deeper defense relationship with Ankara.<sup>36</sup> Although France wields considerable economic leverage as Tunisia's leading trade partner, particularly as a market for Tunisian exports, Italy does constitute Tunisia's second largest trade partner.<sup>37</sup> Augmenting Italy's trade and investment position, France's economic advantage is

being offset by the sizable investments in Tunisia by Turkey's strategic partner Qatar. Following a pattern witnessed elsewhere in Africa,<sup>38</sup> Turkey has been seeking to advance military cooperation with Tunisia while Qatar has focused on economic investment. With approximately \$3 billion of investments in Tunisia,<sup>39</sup> Qatar ranks as Tunisia's second largest investor, behind France and ahead of Italy and Germany, who rank third and fourth respectively.<sup>40</sup> Easing Tunisia's economic dependence on France has enabled Tunisia to exert more autonomy in its foreign relations.

The Turkey-Italy-Tunisia commercial corridor, with its central hub at Italy's Taranto port, may establish the developing Italo-Turkish-led alignment as a lasting feature of Mediterranean geopolitics. Italy's assertion of strategic autonomy in the wider Mediterranean and its developing partnership with Turkey occur within the framework of Italy's NATO and EU commitments. Taranto is both home to an important NATO naval base<sup>41</sup> and services the EU's own Scandinavian-Mediterranean transportation connectivity program. By creating a Europe-to-Africa commercial corridor through the central Maghreb, the geopolitical symbiosis between Italy and Turkey has achieved a paradigm shift in Mediterranean geopolitics that is reshaping the contours of NATO's and the European Union's strategic agenda.

*Prof. Michaël Tanchum is a senior associate fellow at the Austrian Institute for European and Security Studies (AIES) and teaches international relations of the Mediterranean and the Middle East at the University of Navarra, Spain. He is also a fellow at the Truman Research Institute for the Advancement of Peace, the Hebrew University, Israel, and at the Centre for Strategic Policy Implementation at Başkent University in Ankara, Turkey.*<sup>42</sup>



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Dr. Langweg 3, 2410 Hainburg/Donau  
 Tel. +43 (1) 3583080  
 E-Mail: [office@aies.at](mailto:office@aies.at)  
 Website: [www.aies.at](http://www.aies.at)

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