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## C4 2026 – WG 3 – Position paper Sub-Topic

**THE INCREASING COMPETITION BETWEEN CHINA, RUSSIA THE UNITED STATES AND EUROPE IN NORTHERN AFRICA AND WESTERN MEDITERRANEAN FOR SECURITY, TRADE ROUTES AND RAW MATERIALS.**

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### 1. INTRODUCTION

This paper aims to analyse the complex interplay among key global actors in **North Africa and the Western Mediterranean**, a region encompassing Southern European countries—Spain, France, Italy, and Portugal—as well as North African states such as Algeria, Morocco, Tunisia, and Libya. While the geographical focus is clearly defined, the analysis also acknowledges that security dynamics, trade routes, and access to raw materials are deeply interconnected with developments in a wider strategic environment, particularly through maritime and communication corridors that extend beyond the immediate area of study.

Within this context, the growing rivalry among **China, Russia, the United States, and Europe** has intensified, shaping political influence, economic presence, military engagement, and access to critical resources across the region.

This competition is not isolated; rather, it forms part of a broader global realignment. Major powers are adjusting their strategic priorities in response to evolving energy markets, the reconfiguration of global supply chains, and the geopolitical consequences of conflicts, particularly those in Ukraine and the Middle East. These shifts reverberate across North Africa and the Western Mediterranean, where states face complex internal challenges and external pressures. The region's importance is rooted not only in terms of security and trade flows, but also in its function as a space where **the protection, monitoring, and potential disruption of maritime chokepoints and communication routes** can have far-reaching strategic effects. Access to essential raw materials—particularly **energy resources and uranium**—further reinforces the region's strategic relevance.

At the same time, persistent fragility in the Sahel, the emergence of new regional powers, shifting alliances, and the vacuum created by the withdrawal or diminishing influence of Western forces have opened opportunities for alternative actors to expand their presence. This expansion often translates into increased involvement in **infrastructure linked to ports, energy transit, and communication routes**, enabling influence over key nodes that are essential for both economic flows and security.

State and non-state actors exploit instability to project influence, while migration flows, terrorism, organised crime networks, and environmental pressures add further layers of complexity. Together, these factors directly affect European security and highlight the growing interdependence between **freedom of navigation, situational awareness, and regional stability**.

To provide a coherent analytical framework, this paper dedicates one chapter to each of the main actors—**China, Russia, the United States, and Europe**—examining their strategic posture, instruments of influence, and areas of competition in North Africa and the Western Mediterranean. Each chapter focus primarily on energy resources, uranium, maritime routes, ports, and critical infrastructures, while incorporating security and political factors where relevant, particularly those linked to control, surveillance, and protection of key communication routes.



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### 2. CHINA IN THE WESTERN MEDITERRANEAN AND NORTH AFRICA. and Competitive Dynamics

-Strategic Interests

The origins of Chinese strategic interest in Africa stem from the desire to obtain international recognition of its leadership among developing countries, to strengthen itself in direct confrontation with Moscow, and to begin outlining a model that would be an alternative to Western proposals and could support China's international ambitions: on one hand, Beijing allowed African countries access to financing to develop their industry and welfare system; on the other hand, China exploited these new alliances to support future cooperation also within international bodies, such as the United Nations and the WTO. In this sense, the key year was 1971, when the People's Republic of China received recognition as the sole recognized representative authority of China recognized at the international level, obtaining a permanent seat on the United Nations Security Council, at the expense of Taiwan.

A factor that strongly influenced the success of these relationships was that Beijing did not require the 'democracy and transparency clause,' unlike the World Bank and the International Monetary Fund, a clause that provided for the suspension of loans granted if fundamental civil rights were not guaranteed and it was not possible to accurately track the expenses carried out by the governments.

#### 2.1 A Multidimensional Presence in Service of Structural Interests.

The Western Mediterranean and North Africa constitute, for the People's Republic of China, a space of convergence between economic, energy, and geopolitical interests. Far from representing a primarily military theatre, this region is a critical link in Beijing's global strategy, structured around three axes: securing maritime commercial routes, accessing hydrocarbon resources, and projecting influence through pivotal states.

The southern Mediterranean corridor — encompassing Egypt, Libya, Tunisia, Algeria, and Morocco — has emerged as a zone of convergence between the continental and maritime corridors of the Belt and Road Initiative (BRI). Chinese investment in port infrastructure, industrial zones, energy projects, and telecommunications networks illustrates Beijing's intent to anchor itself within the maritime arteries linking Africa, Europe, and the Middle East. (*ref. 5*)

- On the energy front, the hydrocarbon wealth of the region, particularly the oil and gas reserves of Algeria and Libya, has made North Africa a central component of China's energy diversification and security strategy. This dependency on stable energy supply lines gives Beijing a direct structural interest in the political stability — or managed instability — of these states.
- Port strategy. China's port approach is the most visible vector of its regional footprint. The port of Piraeus in Greece now functions as China's maritime gateway into mainland Europe. On the southern shore, Morocco's TangerMed port is being positioned as a conduit for exports toward France and wider European markets. In Algeria, the El Hamdania deepwater port project — revived in September 2025 with a revised budget of \$4.7 billion in partnership with China's CSCEC — reflects Algiers's ambition to build a transshipment hub capable of competing with TangerMed, capitalising on anticipated post-conflict economic recovery.



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- Dual-use infrastructure. This infrastructure logic extends well beyond terminal facilities. The construction of rail corridors — including the Piraeus–Budapest link — aims to reduce shipping times, making Chinese products more competitive in European markets. Many BRI ports are built along a model integrating port facilities, industrial parks, and support industries, enhancing their potential military utility. The operational presence of Chinese state-owned enterprises in port management amplifies this dual-use dimension. The Digital Silk Road adds a further layer: Chinese technology firms such as Huawei and Alibaba are deploying broadband infrastructure and cloud computing networks across the region, extending Beijing's intelligence and data-collection capabilities alongside its physical infrastructure investments.

### 2.2 A non-interference diplomacy navigating multi-polar competition.

China's strategic approach in the Western Mediterranean and North Africa is fundamentally distinguished by its reliance on soft power instruments, setting it apart from its principal competitors. China prefers a comprehensive, soft power approach rooted in primarily economic ties, while Russia strategically chooses settings to display hard military power and defence diplomacy.

China's official policy of non-interference in political affairs contrasts sharply with the approaches of historical Western partners. This posture leads North African countries to increasingly view China as a viable alternative partner to Europe and the United States, extending cooperation with Beijing not only on economic and cultural matters, but also on diplomatic and defence issues. Public opinion data reinforces this trend: in Algeria, 68% of respondents viewed China favourably in 2022, compared to 46% for the United States; in Egypt, up to 64% of those polled preferred ties with Beijing — a shift that has deepened since 2023. (*ref. 8*)

- Mediation diplomacy. At the diplomatic level, Beijing has consolidated significant political capital. China hosted negotiations between Iran and Saudi Arabia in March 2023 and facilitated a landmark agreement between fourteen Palestinian factions in Beijing in July 2024. This mediation diplomacy reinforces Beijing's self-presentation as a stabilising, non-hegemonic alternative to Western-led order.
- Vis-à-vis the United States. A power vacuum left by a disengaged United States and a weakened Europe has created an opening for China and Russia to expand their influence across North Africa — most visibly in Libya's proxy conflict, but also in the broader soft power competition over trade, investment, and cultural influence. Washington's relative disengagement under successive administrations has inadvertently accelerated Beijing's entrenchment in the region.
- Vis-à-vis Russia. China and Moscow share an anti-hegemonic agenda that manifests in coordinated naval signalling. The annual trilateral "Maritime Security Belt" exercises, conducted since 2018 by Russia, China, and Iran, aim to strengthen military coordination in response to Western presence, though this alliance remains one of convenience rather than deep strategic alignment. In North Africa, the two powers occupy complementary but sometimes competing niches: Russia relies on hard security tools and mercenary forces — notably in Libya and the Sahel — while China operates through economic leverage and institutional diplomacy.



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- Vis-à-vis Turkey. Ankara and Beijing compete for influence in fragile states without direct confrontation, each exploiting distinct vectors: Turkey through military deployment and political Islam networks, China through infrastructure financing and commercial diplomacy.
- Vis-à-vis Europe. China seeks to consolidate its influence through the ports it already operates, securing alternative trade routes and faster transit corridors, protecting its economic interests and reinforcing the competitiveness of its Maritime Silk Road. Despite increased European scrutiny following Italy's exit from the BRI in 2023, little strategic realignment has occurred in the southern Mediterranean. For European and NATO planners, the core challenge now lies not in China's presence, but in the depth of its involvement and the costs of disengagement.

### 3. RUSSIA

#### 3.1 Strategic Posture.

Russia's approach in North Africa and the Western Mediterranean has been redefined since the loss of Syria as a reliable base of Russian operations. Evolving energy markets, the reconfiguration of global supply chains, the geopolitical consequences of the war in Ukraine, instability in the Sahel, and the emergence of new regional powers have made the strategic-operational environment both challenging and dynamic for the Russian Federation. Consequently, Russia is in a period of recalibration. Moscow is not trying to outspend the United States or China. Instead, it is working to secure leverage at relatively low cost, remain a strategic "frustrater" for Western nations, and remain influential with the regimes that control Europe's southern flank.

Russian trade, arms exports, and deployments in North Africa and the Mediterranean remain small compared with the U.S. and China, but Moscow still manages to shape outcomes, especially in Libya and the Maghreb. To do this Russia maintains multiple partnerships for access and basing in the region. Their strategic aim is to develop a distributed, access-oriented, anti-Western balancing posture with Libya and the central Mediterranean as hubs. The purpose of this new posture is to expand Russian influence, disrupt Western activity, and secure long-term access to the Mediterranean.

#### 3.2 Strategic Means.

To achieve their strategic objectives in the region, Russia employs low-cost, hybrid capabilities that combine hard and soft instruments, often below the threshold of conventional conflict. They do this through military and security organizations such as private military contractors and proxies (e.g., Wagner legacy networks, "Africa Corps"). They also employ security assistance (training, weapons sales, air defense capability) to align with and obtain support from North African regimes. The reliance on proxies and local regimes also offers Russia deniability of its activity in the region. Perhaps the most powerful instrument that Russia employs is disinformation. Russia is heavily involved in influence operations and media control to amplify anti-Western narratives and legitimacy of partner regimes. It uses disinformation in diplomatic engagement as well, framing their presence in terms of "multipolarity" that preserves the host nation's sovereignty and plays to post-colonial sensitivities of African nations. The specific tools of influence Russia employs are a mix of state-to-state diplomacy,



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arms sales, energy and hydrocarbon deals, military advisers and private military forces, trade, and information operations.

### 3.3 Hub and Spoke.

Russia cannot sustain independent activity in Africa and the Mediterranean without a logistical base of operations. The key to Russian competition in the region is Libya. Russian presence there provides access to the rest of the Sahel and Central Africa and possible access to air and naval facilities on the Mediterranean coast. Accordingly, Moscow has been strengthening military and logistical access to Libya as it shifts away from Syria. Russia has built a network of five air facilities and one port in Libya, with the ability to accommodate submarines in Tobruk. Moscow has cultivated ties with Khalifa Haftar to secure access to eastern Libyan territory and military infrastructure. Wholistically, Russia's efforts in Libya appear to be focused on establishing a Mediterranean logistics hub for projecting power deeper into Africa.

### 3.4 Specific National Interests

- Energy: National interests for Russia in North Africa include energy, uranium, maritime routes, and key infrastructure. In Libya, the biggest prize is crude oil and associated gas. Reuters reported that Libya holds about 80 trillion cubic feet of natural gas, and it is trying to raise gas output and exports to Europe. Analysts have also said Moscow wants to revive stalled energy investments in Libya and is open new commercial opportunities. In Algeria, Russia pursues natural gas, especially gas that can flow into the European market through the Mediterranean export system. Reuters reported that Spain and Algeria are discussing the transmission of gas through the Medgaz undersea pipeline. Reuters also noted Algeria's Transmed link to Italy as part of the country's gas export network.
- Uranium: Russia's efforts to obtain uranium resources focus on the Sahel, notably Niger, reflecting a strategic emphasis beyond the Maghreb. In September 2025, Reuters reports that Niger wanted to build two 2,000-MW reactors with Rosatom, and it was also proposing cooperation with Russia to develop its uranium reserves. Russia is not overtly buying uranium in North Africa, but Moscow is building nuclear access and leverage. For example, Algeria signed a 2024 cooperation road map with Rosatom covering peaceful nuclear uses, including research reactors, nuclear medicine, and fuel-cycle technologies. This agreement is the result of years of nuclear cooperation talks between Russia and Algeria. In Morocco, the government signed a 2023 Memorandum of Understanding with a Rosatom subsidiary to explore nuclear-powered desalination; the arrangement is more about technology partnership rather than uranium acquisition. Establishing this exchange may prove fruitful for Russia because Morocco has one of Africa's largest uranium deposits. Algeria and Libya also have unexploited uranium reserves. Libya has an historical nuclear partnership with Russia and benefitted from Soviet-era assistance to its nuclear infrastructure. Russia is trying to gain uranium access most directly in Niger. In North Africa and the western Mediterranean Russia pursues nuclear cooperation, fuel-cycle influence, and future project access.
- Maritime Freedom of Navigation: When it comes to maritime presence and freedom of movement, Russia is focused on establishing areas to support, repair, refuel, and recover Russian shipping and military assets. Because of the loss of the port of Tartus on Syria's Mediterranean coast, Russia has struggled to sustain shipping in the Mediterranean. Reuters reported in March and April 2026 that



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a damaged Russian LNG tanker drifting off Libya had to be handled by Libyan authorities and towed toward a Libyan port. This example shows how relevant Libyan waters and ports are to Russian maritime operations in the Mediterranean.

- Critical Infrastructure: Further west in the Mediterranean, Russia's visible interest is commercial and logistical, especially in Morocco. Reuters reported that Nornickel is considering port-infrastructure investments in Morocco to reduce reliance on European ports. Morocco is expanding major deep-water facilities such as Tanger Med and Nador West Med, with LNG and hydrocarbons terminals among the planned capabilities. These developments will make Moroccan ports useful as transshipment and supply-chain nodes for Russian vessels. Russia is also seeking access to energy terminals and port-adjacent logistics in the region. Libya has an ongoing effort to expand oil and gas export through the improvement of an oil pipeline and improved port infrastructure.
- Instability as a strategic tool: One of Russia's most cost-effective means of competing in North Africa and the Western Mediterranean is its ability to exploit and amplify political and social instability. By promoting anti-Western narratives, Moscow has contributed to shifts in alignment following coups in Mali (2021), Burkina Faso (2022–23), and Niger (2023), where anti-French sentiment and pro-Russian messaging spread rapidly through social media and public demonstrations. Similar narratives have circulated in Algeria and Libya. These efforts are reinforced through coordinated online activity, including false accounts and automated amplification in French, Arabic, and local languages, as well as expanded broadcasting by Russian state-linked media. When combined with visible military presence, resource agreements, and political backing of ruling juntas, this approach strengthens Russia's credibility and enables influence at relatively low cost by deepening instability and constraining Western engagement.

### 4. UNITED STATES OF AMERICA

#### 4.1 Strategic Reorientation.

Over the last decades, the United States has significantly altered its approach to North Africa and the Western Mediterranean. Previously, US policies for the region were designed and based in the prosecution of the Global War on Terror with a focus on counterterrorism, border control, intelligence coordination, and containing extremism. However, this approach is now being increasingly influenced by the Great Power Competition (GPC) (*ref. 28*), in which local and regional behaviours are part of a global geopolitical power scenario between major powers. This region has acquired renewed importance as an arena of geopolitical contestation, not only due to its proximity to Europe and its role in energy flows, migration routes, and maritime security, but also because it offers opportunities for revisionist powers, such as Russia and China, to expand their influence and interests.

US, as the principal actor in maintainin the Liberal International Order (LIO), has typically used a combination of security partnerships and policies to promote economic growth, cooperation and support for democracy in different regions. However, the growing influence of other powerful actors in these areas is a direct challenge to American ability to influence others and threatens the foundations of the LIO itself. The expanding influence of other global political actors represents a



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major shift in the global balance of power, and the US must adapt its policies and strategies to address this new reality. At the same time, this strategic reorientation has unfolded in what many analysts describe as an era of global disorder, characterized by the weakening of multilateralism, the erosion of liberal norms, the resurgence of power politics, and growing uncertainty about the coherence of Western leadership (*ref. 25*). Key challenges for the US include, preserving its relevance and influence in a changing world, maintaining strategic access to important areas and resources, preventing rival powers from consolidating their influence, balancing its own interests with broader requirements for stability and security—challenges that are particularly salient in the Mediterranean region and across the countries of North Africa, which constitute the core area of study of this analysis.

### 4.2 Security Architecture and Military Partnerships.

The cornerstone of U.S. engagement in North Africa is its institutionalized security network, managed primarily through USAFRICOM. Unlike its rivals, the U.S. leverages long-standing military-to-military relationships and a specialized diplomatic status to anchor its presence. The U.S. has designated Egypt, Morocco, and Tunisia as Major Non-NATO Allies, a status that provides these nations with prioritized access to defence equipment, training, and joint development initiatives (*ref. 31*). Morocco is the largest African purchaser of U.S. arms, with over \$8.5 billion in active foreign military sales (*ref. 31*). In the Sahel and North Africa, U.S. interests are traditionally defined by "peace and security, humanitarian and developmental activities, and counterterrorism" (*ref. 28*). However, in the last years U.S. is facing a scepticism and non-alignment approach from many African countries regarding their hegemony (*ref. 30*).

### 4.3 Protection of maritime trade routes.

The Western Mediterranean and the adjacent Red Sea transportation corridors are critical for global commerce, serving as the gateway for trade between Europe, Asia, and sub-Saharan Africa. The U.S. navy prioritizes the freedom of navigation through vital maritime bottlenecks, notably the Suez Canal and the Straits of Gibraltar (*ref. 28*). Camp Lemonnier in Djibouti remains the largest and most critical U.S. military installation on the continent. It serves as a primary hub for monitoring trade flows through the Bab al-Mandab strait into the Suez Canal (*ref. 28*). The establishment of a Chinese "overseas logistics support base" in Djibouti in 2017 is viewed by Washington as a direct challenge to U.S. maritime dominance in the region (*ref. 28*) (*ref. 31*). Energy and politics are closely tied when it comes to controlling the routes that oil and gas travel on. U.S. wants to make sure that these energy sources can move freely, especially since the Western Mediterranean is becoming a more important place for Europe to get gas. Right now, the way energy is distributed around the world is changing quickly because of wars in certain regions.

### 4.4 Competition for Raw Materials.

As global demand for critical minerals and renewable energy resources intensifies, the United States has launched aggressive economic initiatives to provide an alternative to China's Belt and Road Initiative (BRI). U.S. policies are not limited to access to raw materials; they also include protecting energy corridors, port infrastructure, maritime routes, digital networks, and logistical links between Africa, Europe, the Atlantic, and the Middle East. From Washington's perspective, countries along



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Africa's Mediterranean coast like Morocco, Algeria, Tunisia and Egypt are relevant because they combine geographical position, energy potential, maritime access and political importance. Morocco is important because of its Atlantic and Mediterranean positions, renewable energy potential, role in logistics and phosphate resources. Algeria remains important as a natural gas supplier to European markets, while Egypt is central due to the Suez Canal, LNG infrastructure and access to the Red Sea. The US has some strategic plans to help Africa's economy grow; Programs like Prosper Africa and the African Growth and Opportunity Act are intended to make it easier for businesses to work together to stimulate profit and prosperity. The U.S. also focuses on the "renewables market," recognizing that Africa's power choices will have long-term implications for global security (ref. 27). Furthermore, the U.S. has warned African partners that adopting Chinese technological infrastructure (such as Huawei's 4G/5G networks) could have implications in national security and future intelligence cooperation (ref. 31).

### 4.5 Strategic Adaptation and the "Marketplace" of Influence.

The U.S. and their allies are confronting the rise of "illiberal" conflict management models supported by other international players. These models force America to adapt and alter its strategy based on the level of regional competition. For example, in areas of high competition like Mali, the U.S. has reduced its direct military footprint while attempting to maintain influence through humanitarian and development sectors. In other low-competition areas like Mozambique, the U.S. and its partners combine military equipment (via tools like the European Peace Facility) with long-term developmental aid to consolidate their role as the primary security provider (ref. 26).

## 5. EUROPEAN UNION- Main EU political, financial, commercial and migration instruments for North Africa

The European Union (EU) has developed an extensive web of instruments to engage with North Africa.

The **New Agenda for the Mediterranean** issued in 2021 defined five priority areas: Human development, good governance and the rule of law; resilience, prosperity and the digital transition; peace and security; migration and mobility; the green transition: climate resilience, energy and environment. It was backed by the **Neighbourhood, Development and International Cooperation Instrument – Global Europe (NDICI-GE)**, the main financial arm of EU external action that seeks *“to uphold and promote the Union’s values and interests worldwide”* (ref. 32). It mobilised €6 billion for the *“Southern Neighbourhood”* (which includes not only Morocco, Algeria, Tunisia, Libya and Egypt but also Israel, Palestine, Jordan, Lebanon and Syria).

A significant portion of the efforts focuses on migration control. €906m were allocated to migration-related goals between 2021 and 2024 (ref. 33).

In 2025 the EU proposed a comprehensive **Pact for the Mediterranean**: *“All relevant EU financial instruments will be mobilised to support the implementation of the Pact (...). The EU and the southern Mediterranean partners will work towards upholding human rights, good governance and fundamental freedoms, in line with the 2030 Agenda for Sustainable Development. They will simultaneously promote gender equality, non-discrimination and the rights of persons with disabilities.”* (ref. 34)



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The Pact explicitly packages security, migration and economic connectivity as a unified strategy. Existing civilian missions (like EUBAM Libya, rule-of-law and police cooperation projects) will be scaled and better linked to investment projects and regional forums. The expected operational effect is improved strategic coherence (*ref 34 bis*).

**The European Peace Facility** has become the EU's main financial backbone for African-led peace operations, marking a shift from a predominantly civilian crisis-management approach to a more geopolitical understanding of security partnerships with Africa (*ref 46*).

Until today, despite the massive amounts of development aid provided to southern neighbours to address the needs of their citizens, no fundamental changes have taken place (*ref. 35*).

The EU has concluded **Association Agreements** with Morocco (in force since 2000); Algeria (in force since 2005); and Tunisia (since 1998). They go beyond economic and commercial issues and contain provisions on political dialogue, regulatory approximation, services, investment and sometimes cooperation on justice and home affairs, including migration. A couple of issues that have come up highlight their importance.

Products from Western Sahara certified to be of Moroccan origin have been imported to the Union, benefiting from the tariff preferences laid down in the Association Agreement. But the Court of Justice of the European Union ruled on 21 December 2016 that it applied only to Morocco and not to Western Sahara. An amendment to the Association Agreement was approved to grant products originating in Western Sahara the tariff preferences (*ref. 36*).

In March 2024 the European Commission launched a formal dispute-settlement procedure against Algeria under the Association Agreement. The EU argues that a series of Algerian measures adopted since 2021 breach the Agreement's commitments on progressive trade liberalization and non-discrimination. From Algeria's perspective, the arbitration is a challenge to a structurally asymmetric agreement concluded in 2002, during a unipolar moment (*ref. 37*).

**Global Gateway** (2021) is the European Union's strategy to boost smart, clean and secure connections in digital, energy and transport sectors, and to strengthen health, education and research systems across the world. Global Gateway is explicitly aligned with the UN's Agenda 2030, as well as the Paris Agreement. The EU will mobilise €150 billion for Africa under Global Gateway (*ref. 38*). But these headline figures may be misleading: "(...) *The investments are expected to come largely from the private sector; with the EU securing the money through its investment guarantees.*" (*ref. 39*) One of the objectives of the Global Gateway is to promote nearshoring in the Mediterranean region, thereby shortening supply chains and reducing costs and dependence on Russia or China. Three projects related to regional connectivity between Europe and North Africa are worth mentioning (*ref. 40*).

1. The construction in Egypt of a high-voltage submarine power interconnection to transfer green energy to Greece (GREGY).
2. A power line running from the electrical substation in Sicily to the Tunisian peninsula of Capo Bon, with a total length of 220 km and a capacity of 600 MW (ELMED).
3. In Morocco, preparations are underway for the construction of a "Power-to-X" hydrogen plant. This term refers to the process of converting renewable energy into sustainable green products (the 'X'), such as green hydrogen. Given Europe's inability to produce within its own borders the green



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hydrogen it will need, the EU is expected to import between 25% and 50% from neighbouring North African countries. Thanks to its strategic geographic location and its vast potential for wind and solar energy, Morocco will play an essential role.

A notable example of the struggle for raw materials is Morocco's expansion of its claims not only over the waters adjacent to its own coast, but also over those off the coast of Western Sahara. This conflict encapsulates the tensions of the current international order (strategic resources, territorial disputes, migratory pressure, environmental sustainability and hybrid warfare) (*Annex II*).

### Less official objectives

While official documents frame EU policy in terms of partnership, shared prosperity and values, there are a set of less openly acknowledged objectives.

- Short term stabilisation and regime support. The European Neighbourhood Policy review after the Arab uprisings already shifted emphasis towards “stabilisation”, and NDICI programming often channels funds through state institutions rather than directly to civil society. ECFR notes that the leaders of Morocco, Algeria and Tunisia “*have turned energy assets, the threat of migration, and even the risk of economic collapse into tools to secure diplomatic goals, deflect international criticism, and extract financial support without burdensome conditions.*” (ref. 41)
- Migration control through externalisation of borders. The migration crisis in Spain and Greece triggered by Morocco (2021) and Turkey (2020), “*(...) must be understood in light of the externalization of migration control carried out by the EU and its member states over the past 30 years. (...) outsourcing the management and control of migration flows to countries of origin and transit in exchange for strategic resources and support. (...) The Rabat government's border blackmail would not have been possible if Spain had not ceded a significant portion of its responsibility for migration matters to Morocco.*” (ref. 42)

The policy of outsourcing means giving up the defense of one's own borders, and it paves the way for extortion.

- Consolidating EU influence and countering rival powers. The Global Gateway strategy is widely seen as a direct response to China's Belt and Road Initiative and as part of a *systemic rivalry* against increasing Chinese influence. EU infrastructure and energy projects in North Africa are allegedly designed not only to support development but also to anchor partner countries within EU-centric value chains, reducing space for China, Russia or Gulf actors. But reality doesn't always coincide with the figures and instruments: “*(...) since Russia's invasion of Ukraine in 2022, Brussels is looking more to the east than to the south, with all that implies in terms of political priorities and commitment of economic and human resources. As a result, the southern rim of the Mediterranean is largely perceived as a series of threats, and only rarely as an area of opportunities.*” (ref. 43).

## 6. CONCLUSIONS

North Africa and the Western Mediterranean have become a central arena of geopolitical competition, where strategic rivalries among China, Russia, the United States, and Europe are increasingly shaping security dynamics, economic dependencies, and political alignments. Control



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over maritime routes, energy corridors, ports, and critical infrastructure is no longer a secondary issue but a core determinant of regional and European security.

Within this competitive landscape, **China represents the most structurally transformative challenge.** Rather than pursuing direct confrontation, Beijing has adopted a long-term strategy of systematic positioning along the region's key levers of connectivity, energy supply, and digital infrastructure. Through sustained investment, the avoidance of political conditionality, and a discourse of non-interference reinforced by mediation diplomacy, China is consolidating durable influence over strategic nodes while minimizing the costs associated with traditional security provision.

This patient, multi-instrumental approach—explicitly framed by Beijing as an “all-weather community with a shared future for the new era”—allows China to accumulate strategic depth on a temporal horizon that contrasts sharply with Western political cycles. As Western engagement becomes more fragmented, this model poses a sustained challenge to European and transatlantic influence in the Mediterranean and North African space.

**Russia acts primarily as a spoiler power in the Western Mediterranean and North Africa.** Its objective is not regional leadership but the systematic erosion of Western influence through opportunistic and low-cost strategies. By exploiting political and social instability, relying on proxies, securing selective basing access—particularly in Libya—and deploying sustained information and disinformation campaigns, Moscow has demonstrated its ability to impose strategic friction despite its limited economic and military resources.

Russia's ambitions in the region focus on frustrating Western activity while gaining access to key natural resources and energy assets, notably crude oil and natural gas in Libya and Algeria, alongside nuclear cooperation and technology partnerships in countries such as Niger and Morocco. These objectives are pursued through pragmatic partnerships with local regimes that provide access and political cover, combined with persistent media and online influence operations aimed at shaping public perceptions and reinforcing anti-Western narratives.

Although constrained by limited resources and structural weaknesses, Russia benefits from the declining presence of the United States and Europe and from China's parallel expansion. With minimal investment but a calibrated use of hybrid tools, Moscow is able to sustain influence, constrain European freedom of action, and maintain pressure along Europe's southern flank. In the foreseeable future, Russia is therefore likely to continue acting as a disruptive force that systematically frustrates European interests in the Mediterranean and North African region.

**The United States remains the primary security guarantor in North Africa and the Western Mediterranean,** particularly in the domains of maritime security and military cooperation. However, its gradual strategic reorientation and reduced political engagement have created openings for rival powers. As competition intensifies, Washington has increasingly shifted toward more transactional and pragmatic partnerships, reflecting an acknowledgement that influence in the region can no longer be taken for granted.

As a status quo power, the United States faces the challenge of sustaining its credibility while operating in a crowded and competitive regional marketplace. Although its security architecture—largely anchored in partners such as Morocco and Tunisia—continues to provide a significant



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advantage, future U.S. influence will depend less on military presence alone and more on its ability to compete simultaneously across security, development, and strategic infrastructure domains. Reconciling its democratic identity with the urgent developmental and security priorities of North African states, which now enjoy greater strategic autonomy and “more options than ever before,” (ref. 30,31) will be critical to maintaining U.S. relevance in the Mediterranean and North African area of study.

**Europe faces the most direct consequences of the evolving strategic competition in North Africa and the Western Mediterranean, yet remains the least coherent actor.** Persistent internal fragmentation, divergent national agendas in the Maghreb, and a predominantly reactive posture have significantly weakened the EU’s strategic leverage and credibility. As a result, European policy has often proved inconsistent and vulnerable to bilateral crises (ref 44), limiting its capacity to influence an environment shaped by actors pursuing clearly defined and sustained strategic objectives.

Instruments such as the New Agenda for the Mediterranean and Global Gateway provide a formal framework for action, but their effectiveness has been constrained by slow implementation, limited political unity, and questions regarding their added value over pre-existing tools. In North Africa, the impact of Global Gateway will ultimately depend on its ability to deliver visible infrastructure and energy projects that can compete with other external actors while adhering to social and environmental standards. The EU’s emphasis on advancing an agenda aligned with the 2030 framework distinguishes its approach from the power-centric strategies of its competitors (ref 45), but also places additional demands on delivery and coherence.

Ultimately, the Western Mediterranean and North Africa are no longer peripheral to great-power politics but constitute a frontline of strategic competition. In this context, outcomes will favour actors capable of combining political will, economic instruments, and long-term strategic vision. For Europe and NATO, safeguarding their interests requires moving beyond crisis management toward sustained and coordinated engagement that treats the southern neighbourhood as a strategic priority rather than a secondary concern.

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### ANNEX I

### Sources

#	Source & Title	Type	Date
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5	China Quarterly of International Strategic Studies — China in North Africa: The Algerian Pivot	Peer-reviewed journal	2025
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7	Asia Society Policy Institute — Weaponizing the Belt and Road Initiative	Think tank	Jul. 2021
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#	Source & Title	Type	Date
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16	The Washington Institute for Near East policy <a href="https://www.washingtoninstitute.org/policy-analysis/russias-growing-influence-north-africa">https://www.washingtoninstitute.org/policy-analysis/russias-growing-influence-north-africa</a>	Policy analysis	Feb.2019
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### ANNEX II

#### Interest about Mount Tropic

Through its domestic legislation of 1973, 1975, and 1981, Morocco defined its rights over the sea adjacent to its coast in a manner similar to how they would be regulated in the final text of the 1982 Convention<sup>1</sup>, albeit with clear excesses in the drawing of straight baselines. The original Moroccan law of 1981 stipulated that *the outer limit of the EEZ shall not extend beyond the median line*.

Let us cite some relevant facts. In January 2009, the Sahrawi Arab Democratic Republic (SADR) submitted a claim to the UN for a 200-mile EEZ for the coasts of Western Sahara.

In 2014, Spain submitted a proposal to the United Nations Commission on the Limits of the Continental Shelf to extend its continental shelf beyond 200 miles from the Canary Islands, arguing that the Tropic Seamount area is a natural extension of its continental plate.

In 2015 Morocco submitted a formal request to the United Nations to extend its territorial waters, arguing that its continental shelf extends far beyond 200 miles.

Two laws passed by Morocco in 2020 amend previous ones. They stipulate that the delimitation of the Exclusive Economic Zone (EEZ) in the area off the Canary Islands (without mentioning them) must take into account all relevant factors to achieve an “equitable” result. This reflects Morocco's opposition to delimiting its EEZ along the Atlantic coast using the equidistance principle, arguing that the same value cannot be given to “small” island territories as to an extensive continental shelf.

Regarding the continental shelf, it states that its outer limit extends to “*a distance not exceeding 350 nautical miles from the baselines...*”.

With these unilateral acts (alleged equity to extend the EEZ and alleged geological reasons to extend its continental shelf to 350 miles) Morocco intends to seize a large part of the EEZ

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<sup>1</sup>The 1982 United Nations Convention on the Law of the Sea recognizes the coastal State:

- (i) exploration, exploitation and regulation rights over the natural resources of the waters, seabed and subsoil of the *exclusive economic zone* (EEZ), which extends up to 200 miles from the baselines used to delimit the *territorial sea*;
- (ii) exclusive sovereign rights over the natural resources of the seabed and subsoil (not the waters) of the *continental shelf*, which extends to the outer edge of the continental margin, and at least 200 miles from the baselines (which may be extended to 350 miles in certain cases).

In the absence of an agreement between States facing each other, Articles 74 and 83 of the Convention give precedence to an “*equitable solution*”, a vague formula distinct from the more objective one of equidistance that governed the 1958 Convention and continues to govern for the *territorial sea*.



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rights generated by the Canary Islands, and of the rights that Spain aspires to for its own continental shelf.

But the most serious issue is that Morocco is already indicating, in its legislation and in public statements by its leaders, that the rights it claims originate not from its own coasts, but from those of Western Sahara, which it refers to as the Southern Provinces. This is, as is well known, a territory largely occupied by Morocco since the Green March of 1975, without the United Nations recognizing its sovereignty. The US did recognize it in December 2020, and Israel in July 2023, in exchange for the normalization of relations between Morocco and Israel (and most likely in exchange for commitments in favor of the US and Israel to participate in the strategic resources of the continental shelf that Morocco would appropriate). Spain has not properly reacted to these acts contrary to international law and seriously detrimental to its interests.

When Morocco declares its baselines along the coasts of Western Sahara through regulatory development, it will generate an EEZ south of the 27<sup>º</sup> 40' N parallel, where it will undoubtedly continue to apply the same principles and arguments to the detriment of the Spanish EEZ and continental shelf (current or eventually expanded).

This particularly affects Mount Tropic, located 250 miles southwest of the Canary Islands and part of a group of ancient submarine volcanoes geologically connected to the islands. Significant deposits of hydrocarbons and strategic metals such as tellurium, cobalt, rare earth elements, and nickel have been identified on its seabed.

In any case, disagreement will exist with the SADR if it ultimately asserts its rights over Western Sahara.

For Spain, these disputes are extremely serious. Any restrictions or legal uncertainty surrounding the waters around the Canary Islands affect fishing and tourism. The possibility of hydrocarbon exploration and exploitation near the archipelago poses an ecological threat. And the defense of the Canary Islands' maritime rights is key to national security.

For now, Spain's official response has been to diplomatically reject Morocco's unilateral actions, commit to bilateral dialogue, and a defense of *equidistance*.

Spain authorized hydrocarbon exploration activities east of the Canary Islands, prompting a formal protest from Morocco despite the fact that they were located within the 200-mile EEZ.

Morocco has granted exploration and exploitation licenses in areas off the coast of Western Sahara, such as the natural gas license to the Israeli company NewMed Energy. And there is a growing increase in Moroccan military investment. Support for Morocco from the US, Israel, and France is disrupting the strategic balance in the Atlantic, affecting access to trade routes, resources, and regional energy projects.



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Spain's legalistic and dialogue-oriented approach contrasts with Morocco's decades-long hybrid war, which, through unilateral legislation, physical presence in the disputed space, economic exploitation, information manipulation, and diplomatic ties with other powers, advances unchecked and without incurring proportionate reprisals.

This conflict affects the EU's strategic interests in the Western Mediterranean. However, the EU, which has assumed a significant portion of Spanish sovereignty and allocates vast amounts of money and aid to Morocco, turns a blind eye, claiming it is a bilateral matter between Spain and Morocco. ( [Parliamentary Question | Answer](#)) for question [E-000518/20 | E-000518/2020\(ASW\) | European Parliament](#) <sup>2</sup>.

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<sup>2</sup>Main sources used: Samuel Morales Morales , *“The maritime geopolitics of the Canary Islands: tensions between Spain and Morocco in the context of the Western Sahara conflict”*, [Naval Thought Notebook No. 41](#)  
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