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The Enlarged Mediterranean as a Strategic Space

The Enlarged Mediterranean as a Strategic Space

Abstract:

This article analyses the enlarged Mediterranean as a strategic space that has become central for the European Union in a context of international fragmentation, great-power competition and growing European vulnerability. It argues that the Mediterranean can no longer be understood solely as Europe's southern border, but rather as a space where energy, connectivity, maritime security, trade routes, critical infrastructure and geopolitical rivalry converge. The article examines, first, why this space has regained strategic relevance for Brussels; second, how it is currently structured through three main vectors—energy, connectivity and competition for influence—and, third, what the new Pact for the Mediterranean seeks to correct and what its limitations are. The analysis also highlights the direct implications for Spain, both in terms of risks and strategic opportunities. It concludes that the key question is no longer whether the Mediterranean matters, but whether the EU is prepared to act in it as a genuine strategic actor.

Keywords:

Enlarged Mediterranean, European Union, energy, connectivity, geopolitics.

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Introduction

The European Union is once again turning its attention to its southern neighbours, not out of geographical nostalgia or a renewed Euro-Mediterranean vocation, but because an increasingly fragmented, competitive and adverse international environment has made it more vulnerable. For that reason, and because it needs to recover political weight in the region, the EU is seeking to launch a new phase in its policy towards the south, thirty years after the Barcelona Declaration was signed in November 1995. This is a space where, on the one hand, actors such as China, Russia and the Gulf states have been steadily gaining influence, and where, on the other, European interests are increasingly tied to energy and maritime security, connectivity and regional stability. As Tarek Megerisi of the European Council on Foreign Relations (ECFR) argues in "The full monty: Why the Mediterranean pact needs to offer the works", the southern Mediterranean is now "where Europe's prosperity, security, and geopolitical relevance will be won or lost".[1]

That political shift took concrete form with the launch of the new Pact for the Mediterranean, adopted on 16 October 2025. In its briefing *The Pact for the Mediterranean*, the European Parliament presented it as a new strategic framework designed to strengthen cooperation with southern partners and build a more integrated, stable and prosperous "Common Mediterranean Space". The same document also describes it as an "ambitious paradigm shift" in Euro-Mediterranean relations, grounded in co-ownership, co-creation and shared responsibility.[2]

The framework also has one important distinguishing feature: although it is aimed primarily at ten Mediterranean countries, the Mediterranean envisioned by this new approach also extends to the Gulf, sub-Saharan Africa, the Western Balkans and Turkey. The logic is clear. The Mediterranean can no longer be read merely as the European Union's southern border, but as an enlarged strategic space in which energy,

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[1] MEGERISI, Tarek. *"The full monty: Why the Mediterranean pact needs to offer the works".* European Council on Foreign Relations (ECFR), 2025. Available at: https://ecfr.eu/publication/the-full-monty-why-the-mediterranean-pact-needs-to-offer-the-works/ (accessed 27/04/2026).

[2] EUROPEAN PARLIAMENT. *The Pact for the Mediterranean*. EPRS Briefing, PE 779.223, November 2025. Available at: https://www.europarl.europa.eu/RegData/etudes/BRIE/2025/779223/EPRS_BRI%282025%29779223_EN.pdf (accessed 27/04/2026).

infrastructure, security, investment and geopolitical competition converge. It is also a space in which Europe's security, strategic autonomy, influence and external projection are at stake, with direct implications for Spain.[3] The European Commission itself presents it as an effort to build a Mediterranean area that is "more connected, prosperous, resilient and secure".[4]

That said, there is no room for naivety. As Richard Youngs of the Carnegie Endowment for International Peace argues in "The EU's Dead-on-Arrival Pact for the Mediterranean", today's Mediterranean is very different from the one of the Barcelona Process years: regional politics are now shaped much more heavily by non-Western powers and intra-regional dynamics, while the EU itself has become more dependent on regional governments in areas such as migration, energy and counterterrorism cooperation.[5] Added to that is the diversity of interests and positions among EU member states themselves. Against that background, the real question is whether this new European strategy truly represents a change of approach, or whether it is, in essence, a rebranding of neighbourhood policy.

Why the Mediterranean Has Once Again Become Central for the EU

The Mediterranean can no longer be understood simply as a space for cooperation, neighbourhood policy or interregional dialogue. For the European Union, it has become a zone in which many of its core strategic priorities converge: energy security, migration, regional stability, climate adaptation, trade routes, connectivity, great-power competition and political influence. The European Commission itself presents the new Pact for the Mediterranean as an initiative aimed at building a "more integrated, resilient and secure" common space in a region it acknowledges is marked by "complex global and regional challenges".[6]

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[3] EUROPEAN PARLIAMENT. *The Pact for the Mediterranean*. EPRS Briefing, PE 779.223, November 2025. Available at: https://www.europarl.europa.eu/RegData/etudes/BRIE/2025/779223/EPRS_BRI%282025%29779223_EN.pdf (accessed 27/04/2026).

[4] EUROPEAN COMMISSION. *Pact for the Mediterranean: enhancing jobs, energy and security*. European Commission, 16/10/2025. Available at: https://commission.europa.eu/news-and-media/news/pact-mediterranean-enhancing-jobs-energy-and-security-2025-10-16_en (accessed 27/04/2026).

[5] YOUNGS, Richard. "The EU's Dead-on-Arrival Pact for the Mediterranean". Carnegie Endowment for International Peace, 2025. Available at: https://carnegieendowment.org/research/2025/09/the-eus-dead-on-arrival-pact-for-the-mediterranean (accessed 30/04/2026).

[6] EUROPEAN COMMISSION. *Pact for the Mediterranean: enhancing jobs, energy and security*. European Commission, 16/10/2025. Available at: https://commission.europa.eu/news-and-media/news/pact-

Russia's invasion of Ukraine accelerated this shift. Before the full-scale invasion, Moscow was a key energy supplier for the EU. According to the European Commission, Russia accounted for 45% of European gas imports in 2021. That dependence had fallen to 12% by 2025, but the shift forced the Union to rapidly reconfigure its supply sources and look more closely to the southern flank for gas, electricity, interconnections and renewable energy. By 2025, North Africa already accounted for 13% of EU gas imports, behind only Norway and the United States. In this new context, the Mediterranean has ceased to be a periphery and has become part of Europe's response to a dual challenge: energy security and decarbonisation.[7]

Yet the transformation is not only about energy. The region has become far more contested, and Mediterranean governments now have more options than they did a decade ago. China is the clearest example: trade between Beijing and the Arab League countries reached roughly $393.75 billion in 2023, according to figures from China's General Administration of Customs reported by Xinhua.[8] Its presence no longer revolves solely around buying Gulf hydrocarbons; it now extends to infrastructure, ports, energy, technology and financing linked to the Belt and Road Initiative, with a particularly prominent role in economies such as Egypt, Algeria, Saudi Arabia, the United Arab Emirates and Morocco.

Russia, for its part, retains influence on several fronts despite the wear and tear of the war in Ukraine. In Syria, its military and energy presence remains a source of leverage; in Libya, it continues to operate through military, diplomatic and security networks; and in the Sahel—Mali, Burkina Faso and Niger—it has sought to fill the space left by France and other Western actors through the former Wagner ecosystem and its successor, Africa Corps. The European Parliament has warned that Russian influence in Africa also operates through informal channels, including private military companies and information operations.[9] PISM, for its part, describes Africa Corps as a tool increasingly subordinated

mediterranean-enhancing-jobs-energy-and-security-2025-10-16_en (accessed 27/04/2026).

[7] EUROPEAN COMMISSION. *In focus: EU energy security explained*. European Commission, 20/04/2026. Available at: https://energy.ec.europa.eu/news/focus-eu-energy-security-explained-2026-04-20_en (accessed 03/05/2026).

[8] XINHUA. *China-Arab trade booms over two decades*. Xinhua, 30/05/2024. Available at: https://english.news.cn/20240530/f933624bf5bd4e7b8b4426ee9d2b3498/c.html (accessed 03/05/2026).

[9] EUROPEAN PARLIAMENT. *Discharge 2024: EU general budget – European Parliament*. European Parliament legislative resolution, 29/04/2026. Available at: https://www.europarl.europa.eu/doceo/document/TA-10-2026-0081_EN.html (accessed 27/04/2026).

to the Russian Ministry of Defence and used to expand Moscow's military footprint in Africa.[10]

Turkey has also strengthened its profile as an autonomous regional power. Its interests are not confined to the eastern Mediterranean and maritime or energy disputes with Greece and Cyprus; they also extend to Libya, where Ankara has used military agreements, security presence and economic ties to increase its influence in a country that is critical to the balance of the central Mediterranean. A Small Arms Survey analysis of Turkish policy in Libya highlights precisely that combination of economic, political and security interests.[11] In that sense, Libya acts as a node linking Turkish interests across the Mediterranean, sub-Saharan Africa and the Middle East.

Added to this is the growing weight of the Gulf states. The United Arab Emirates, Saudi Arabia and Qatar no longer act only as providers of capital, but as strategic investors and diplomatic players. Egypt is the clearest example: the International Monetary Fund noted that Abu Dhabi's $35 billion Ras El-Hekma deal helped ease immediate pressure on Egypt's balance of payments.[12] Reuters also reported on a separate $29.7 billion project by Qatari Diar, the real-estate arm of Qatar's sovereign wealth fund, on Egypt's Mediterranean coast.[13] At the same time, the UAE has mediated several prisoner exchanges between Russia and Ukraine,[14] while Qatar has consolidated a mediation role that has been especially visible on Gaza and remains active in other regional dossiers.[15]

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[10] PISM. "AFRICA CORPS—A New Iteration of Russia's Old Expansion Tool". Polish Institute of International Affairs, 02/05/2024. Available at: https://pism.pl/webroot/upload/files/Raport/PISM%20Report%20Africa%20Corps_end.pdf (accessed 27/04/2026).

[11] SMALL ARMS SURVEY. *Turkish Foreign Policy in Libya: Geopolitical Interests and Fragile Peace*. Security Assessment in North Africa (SANA), November 2024. Available at: https://www.smallarmssurvey.org/sites/default/files/resources/SAS-SANA-BP-2024-Turkish-FP-Libya-EN.pdf (accessed 27/04/2026).

[12] INTERNATIONAL MONETARY FUND (IMF). *IMF Executive Board Completes the First and Second Reviews of the Extended Fund Facility Arrangement for Egypt, and Approves Augmentation*. Press Release PR24/101, 29/03/2024. Available at: https://www.imf.org/en/news/articles/2024/03/29/pr24101-egypt-imf-executive-board-completes-first-second-reviews-eff-approves-augmentation (accessed 03/05/2026).

[13] REUTERS. *Qatari Diar to invest $29.7 billion in luxury project on Egypt's Mediterranean coast*. Reuters, 05/11/2025. Available at: https://www.reuters.com/world/middle-east/qatari-diar-enter-297-billion-deal-real-estate-project-egypt-2025-11-05/ (accessed 03/05/2026).

[14] REUTERS. *Ukraine, Russia swap 193 prisoners of war each in U.S., UAE-facilitated exchange*. Reuters, 24/04/2026. Available at: https://www.reuters.com/world/europe/ukraine-russia-swap-193-prisoners-war-each-us-uae-facilitated-exchange-2026-04-24/ (accessed 03/05/2026).

[15] REUTERS. *Qatari prime minister says nothing will deter Qatar's mediation role*. Reuters, 09/09/2025. Available at: https://www.reuters.com/world/middle-east/qatari-prime-minister-says-nothing-will-deter-qatars-mediation-

This new balance gives governments in the region greater room for manoeuvre than in previous periods. They no longer depend exclusively on Europe or the United States, but can diversify partnerships and negotiate with several actors at once. Their priorities do not necessarily revolve around aligning with the European agenda, but around protecting their own interests: internal stability, investment, food and energy security, migration control, access to technology, infrastructure development and greater diplomatic autonomy. The war in Ukraine made this plain. In the March 2022 UN General Assembly vote condemning the Russian invasion, five of the nineteen Middle East and North Africa countries examined by The Washington Institute did not support the resolution.[16] Algeria, Iran and Iraq abstained, Syria voted against, and Morocco did not vote. Of those five, three—Algeria, Morocco and Syria—are directly linked to the Mediterranean basin, confirming that this space too was shaped by a logic of strategic caution and preserving room for manoeuvre.

The paradox for the EU is obvious: the Mediterranean is gaining strategic centrality at precisely the moment when Europe's political relationship with much of its southern neighbourhood is experiencing one of its lowest points in terms of trust. The EuroMeSCo/IEMed report *Shaping Policy: Regional Consultation on the New Pact for the Mediterranean* states that "the EU's response to the Israeli-Palestinian conflict has undermined its core values and its credibility in the region".[17] The report also notes signs of a widening trust gap since 2023, particularly around Palestine. According to the survey included in the report, 20.2% of respondents believe the EU's response has damaged the Union's reputation in the region; 20.5% think it has weakened its ability to exert influence through diplomacy and shared values; and 37.9% say it has undermined its commitment to human rights and the rule of law.

That estrangement is not only governmental. It is also social and reputational. The ECFR article "When soft power is spent: Gaza, Ukraine, and Europeans' standing in the Arab world" argues that the Western response to Gaza has radically altered the context of

role-2025-09-09/ (accessed 03/05/2026).

[16] THE WASHINGTON INSTITUTE. "The UN Resolution on Ukraine: How Did the Middle East Vote?" The Washington Institute for Near East Policy, 02/03/2022. Available at: https://www.washingtoninstitute.org/policy-analysis/un-resolution-ukraine-how-did-middle-east-vote (accessed 06/05/2026).

[17] EUROMESCO / IEMED. "Shaping Policy: Regional Consultation on the New Pact for the Mediterranean". Euromed Survey 15, June 2025. Available at: https://www.euromesco.net/wp-content/uploads/2025/06/Survey15_final2_web.pdf (accessed 06/05/2026).

Europe's relations with Arab civil society.[18] For many actors in the region, Gaza has exposed a contradiction between Europe's defence of international law in Ukraine and its response to the Israeli-Palestinian conflict. That perception strikes at one of Europe's main sources of influence: its image as an actor committed to human rights, democracy, the rule of law and civil society.

For a combination of urgency and insecurity, then, the Mediterranean has returned to the centre of the European agenda. The EU needs the region for its energy supply, its security, its migration policy, its climate adaptation and its geopolitical projection. But it faces a southern neighbourhood that is more autonomous, more contested by other actors and less willing to accept Europe's narrative without challenge. The new Pact for the Mediterranean is born of that tension. Brussels needs to relaunch the relationship, but it can no longer do so through the asymmetrical logic that marked earlier stages. If it wants to recover influence, it will have to offer a partnership that is more balanced, more concrete and more credible.

The Mediterranean's New Strategic Logic

It is no longer enough to look at the Mediterranean through the lens of neighbourhood policy, political dialogue or crisis management. Today it no longer functions merely as Europe's southern border, but as a space in which control over routes, infrastructure, supplies and influence is contested. To read it simply as a line separating the EU from its southern neighbourhood is to miss what matters most: how security of supply, decarbonisation, investment and bargaining power between the two shores are being reorganised within this space. That change of scale is most clearly visible in three areas: energy, connectivity and the growing competition among actors over security, infrastructure and strategic projection.

Energy: From Supply to Strategic Interdependence

The first obvious question is this: is the Mediterranean still, above all, about gas? The answer is yes—but increasingly less so. Algeria remains an important supplier for the EU

[18] LYNCH, James. "When soft power is spent: Gaza, Ukraine, and Europeans' standing in the Arab world". European Council on Foreign Relations (ECFR), 04/03/2024. Available at: https://ecfr.eu/article/when-soft-power-is-spent-gaza-ukraine-and-europeans-standing-in-the-arab-world/ (accessed 06/05/2026).

and, according to Tarek Megerisi in “The full monty: Why the Mediterranean pact needs to offer the works” (ECFR), accounts for around 11% of European gas imports.[19] But to reduce the Mediterranean reading to that figure would be to remain stuck in the past. What is at stake today is not simply the replacement of supplies, but the role the southern Mediterranean will play in Europe’s new energy architecture: whether it will remain just an export platform or become a partner integrated into networks, investment, industry and transition.

This is a key point. As Gonzalo Escribano and Aitor Errazkin of the Elcano Royal Institute argue in “Revamping the Euro-Mediterranean Energy and Climate Space”, the Mediterranean basin should be understood as a space of energy and climate interdependence, not as a mere sum of suppliers and consumers.[20] The paper argues that the Mediterranean can play a vital role both in diversifying sources and in integrating renewables, hydrogen and other low-carbon technologies. The key clue is that energy no longer structures this space only through what Europe buys, but through what it aims to build there. In “Energy in the New Pact for the Mediterranean”, Escribano stresses that the pact’s main novelty lies less in fossil supply than in its emphasis on investing in renewables, Euro-Mediterranean grids and decarbonised industrial value chains.[21]

That also explains why the European Commission does not present the pact solely in terms of security of supply. Its language blends clean energy, supply chains, critical materials and infrastructure, while the European Parliament links it to European economic security, the reduction of dependencies and the need to integrate economies and value chains. In other words, Mediterranean energy becomes strategic because it connects three dimensions at once: supply, transition and industrial policy. This is no longer only about receiving more gas; it is about securing networks, interconnections, clean technologies and nearby productive capacity for a Europe that wants to decarbonise

[19] MEGERISI, Tarek. “The full monty: Why the Mediterranean pact needs to offer the works”. European Council on Foreign Relations (ECFR), 2025. Available at: https://ecfr.eu/publication/the-full-monty-why-the-mediterranean-pact-needs-to-offer-the-works/ (accessed 27/04/2026).

[20] ESCRIBANO, Gonzalo; ERRAZKIN, Aitor. “Revamping the Euro-Mediterranean Energy and Climate Space”. Elcano Royal Institute, Policy Paper, 2023. Available at: https://www.realinstitutoelcano.org/policy-paper/renovacion-del-espacio-energetico-y-climatico-euromediterraneo/ (accessed 04/05/2026).

[21] ESCRIBANO, Gonzalo. “Energy in the New Pact for the Mediterranean: renewal, prospects and omissions”. Elcano Royal Institute, 05/12/2025. Available at: https://www.realinstitutoelcano.org/analisis/la-energia-en-el-nuevo-pacto-por-el-mediterraneo-renovacion-perspectivas-y-omisiones/ (accessed 04/05/2026).

without losing competitiveness.

But can the EU build that interdependence without reproducing old asymmetries? Caution is needed here. In "Power sharing: The politics of European-Tunisian energy cooperation", ECFR's Philipp Wagner argues that European energy diplomacy will only be sustainable if it takes into account domestic politics in partner countries and generates tangible benefits, rather than projects designed solely in Brussels.[22] The warning matters because it touches on one of the weak points of the Euro-Mediterranean relationship: the temptation to view the south as a space for extraction, transit or externalisation without genuinely incorporating its productive and social interests. Put more simply, energy cooperation will only make sense if it is also seen on the other shore as development, jobs and useful infrastructure.

Moreover, the energy vector does not organise the Mediterranean in the abstract, but through very concrete rivalries. The closure of the Maghreb-Europe gas pipeline in 2021 following the deterioration of relations between Algeria and Morocco showed how a bilateral dispute can disrupt a corridor with direct consequences for Spain and Portugal. That lesson still holds. The Mediterranean energy space is not a neutral board, but an arena in which infrastructure, regimes, investment and regional conflicts shape one another. That is why energy is not just one of the vectors of the Mediterranean; it is probably the clearest example of how this space has shifted from being a frontier to becoming a strategic corridor.

Connectivity: Routes, Ports, Cables and Supply Chains

Connectivity is the second major vector shaping today's Mediterranean. Its importance is not measured only in commercial terms, but also in its ability to organise data flows, infrastructure, logistics and market access. The Commission places improved digital infrastructure, the integration of supply chains and the promotion of a more sustainable blue economy among its priorities. This is no longer simply about managing a neighbourhood, but about ordering a space of circulation and competition.

The maritime dimension remains decisive. The European Parliament warns that the

[22] WAGNER, Philipp. "Power sharing: The politics of European-Tunisian energy cooperation". European Council on Foreign Relations (ECFR), 2025. Available at: https://ecfr.eu/publication/power-sharing-the-politics-of-european-tunisian-energy-cooperation/ (accessed 04/05/2026).

conflicts in Gaza, Lebanon and Iran, as well as instability in Libya and the Sahel, can quickly reverberate in Europe by disrupting maritime security and trade routes. That matters because it changes the frame: the Mediterranean appears not merely as a theatre of crises, but as a strategic infrastructure whose disruption has almost immediate effects on trade, logistics and, by extension, the European economy.

Yet Mediterranean connectivity is no longer only maritime. It is also digital. In "The Strategic Future of Subsea Cables: Egypt Case Study", Erin L. Murphy and Thomas Bryja of CSIS describe Egypt as a critical node linking Europe, Asia, the Middle East and Africa.[23] Their most striking data point is that the country carries roughly 17% of global internet traffic and more than 90% of communications between Europe and Asia through cables crossing Egypt and the Red Sea. That makes the Mediterranean more than a trade route: it turns it into a piece of the world's data infrastructure.

But connectivity is no longer only about transit. It can attract investment, anchor nodes, concentrate data and capture strategic value, and Egypt lies at the centre of that dynamic. According to the U.S. Department of Commerce, by mid-2025 the country had 15 operational submarine cables and 3 more under construction. It is also positioning itself as a "regional hub for data centers and digital infrastructure" linking Africa, the Middle East and Europe.[24]

Against that backdrop, a new question arises: who controls that connectivity? It is not enough for ports, cables or corridors simply to exist; what matters is who finances them, who protects them and who derives influence from them. Connectivity has therefore become a question of power. The Mediterranean must be read as a space in which more than the movement of goods is at stake: what is at issue is Europe's ability to continue shaping the flows that connect it to Asia, Africa and the Middle East.

Security and Competition Among Actors: A Contested Space

Security in the Mediterranean increasingly depends on who manages to turn presence

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[23] MURPHY, Erin L.; BRYJA, Thomas. "The Strategic Future of Subsea Cables: Egypt Case Study". Center for Strategic and International Studies (CSIS), 2025. Available at: https://www.csis.org/analysis/strategic-future-subsea-cables-egypt-case-study (accessed 03/05/2026).

[24] U.S. DEPARTMENT OF COMMERCE. "Egypt Data Centers". International Trade Administration, 2025. Available at: https://www.trade.gov/market-intelligence/egypt-data-centers (accessed 03/05/2026).

into lasting influence: by financing infrastructure, supporting governments under pressure, offering mediation or controlling strategic corridors. That helps explain why the EU finds this space harder to shape than it did in the past. It is no longer dealing only with actors that project force, but with competitors able to combine capital, protection and diplomatic leverage in a single offer. The real issue, then, is not simply who is present in the region, but who succeeds in making that presence politically useful and strategically profitable.

For the EU, the problem is not only that the environment has become more insecure, but that Europe's capacity to shape it has diminished. The Centre for European Reform warns that, as the Middle East has become "increasingly unstable", Europeans have been "unable to exert influence" over some of the gravest conflicts in their neighbourhood and have been reduced to "marginal" actors.[25] That loss of room for manoeuvre is also taking place in a heavily militarised strategic environment: according to SIPRI, the Middle East accounted for 27% of global arms imports in 2020–2024.[26] The combination of instability, militarisation and external competition helps explain why the region is no longer simply a periphery exposed to crises, but a contested space in which Brussels has direct interests yet declining capacity to set the rules on its own.

Stress Test: Iran, Lebanon and Hormuz

The current escalation involving Iran and the crisis around the Strait of Hormuz have made visible something that, until recently, could still sound too theoretical: the Mediterranean functions as a continuous strategic system. Hormuz is not in the Mediterranean, but its closure or partial paralysis directly affects the strategic value of the entire arc linking the Gulf, the Red Sea, Suez and the eastern Mediterranean. The International Energy Agency (IEA) notes that in 2025 around 20% of global oil trade and nearly one fifth of global liquefied natural gas (LNG) trade passed through Hormuz,[27]

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[25] CENTRE FOR EUROPEAN REFORM. *Annual report 2024*. Centre for European Reform, 2025. Available at: https://www.cer.eu/sites/default/files/annual_report_2024.pdf (accessed 04/05/2026).

[26] SIPRI. HUSSAIN, Zain; TARTIR, Alaa. "Recent trends in international arms transfers in the Middle East and North Africa". Stockholm International Peace Research Institute, 10/04/2025. Available at: https://www.sipri.org/commentary/topical-backgrounder/2025/recent-trends-international-arms-transfers-middle-east-and-north-africa (accessed 04/05/2026).

[27] INTERNATIONAL ENERGY AGENCY (IEA). *Strait of Hormuz*. International Energy Agency, 2026. Available at: https://www.iea.org/about/oil-security-and-emergency-response/strait-of-hormuz (accessed 04/05/2026).

while UNCTAD documented that, following the escalation at the end of February 2026, daily traffic through the strait fell by almost 97% compared with the previous average.[28] The consequence was not abstract: between 27 February and 9 March, international crude and LNG prices rose by 27% and 74% respectively. Those figures show that when Hormuz is blocked, the Mediterranean ceases to be a periphery and becomes part of a chain of interlocking risks.

For the European Union, the impact is measured not only in direct dependence, but in systemic exposure. Europe depends less than Asia on the LNG that passes through Hormuz, but it is far from unaffected: the IEA estimates that around 7% of Europe's total LNG inflows in 2025 came from cargoes that transited the strait. That is enough to move prices, routes and market expectations. In other words, the issue is not only how much gas or oil Europe receives through that route, but the fact that its energy security, trade and perception of risk remain tied to a corridor it does not fully control. This is precisely the kind of dependency that turns the Mediterranean into a first-order geopolitical space: not because it concentrates a single crisis, but because it connects several crises with immediate effects on the European economy.

Lebanon adds another layer to this stress test. The escalation on its territory not only increases tension in the area; it also confirms that this space is a belt of political fragility with direct consequences for Europe. The European Council has warned of rising hostilities and the risk of regional destabilisation,[29] while the EEAS has spoken of more than one million displaced people in the country.[30] From a European standpoint, that affects security, humanitarian assistance, migration pressure and mediation capacity. But it also raises an uncomfortable question: if the security of the Hormuz–Suez–Mediterranean system still depends primarily on U.S. military deterrence, ad hoc naval coalitions and fragile regional balances, to what extent can the EU really act as a strategic

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[28] UNCTAD. *Strait of Hormuz disruptions: implications for global trade and development*. UN Trade and Development, 2026. Available at: https://unctad.org/system/files/official-document/osgttinf2026d1_en.pdf (accessed 04/05/2026).

[29] EUROPEAN COUNCIL / CONSILIUM. *European Council conclusions on the Middle East*. European Council, 19/03/2026. Available at: https://www.consilium.europa.eu/en/press/press-releases/2026/03/19/european-council-conclusions-on-middle-east/ (accessed 06/05/2026).

[30] EUROPEAN EXTERNAL ACTION SERVICE (EEAS). *Lebanon: Statement by the Spokesperson on the recent developments*. EEAS, 2026. Available at: https://www.eeas.europa.eu/eeas/lebanon-statement-spokesperson-recent-developments_en (accessed 06/05/2026).

actor?

Why the EU Is Trying to Reorder It Now

The EU is launching the Pact for the Mediterranean now because it has concluded that the old framework is no longer enough. For years, relations with the southern neighbourhood rested on a mix of neighbourhood policy, bilateral agreements and crisis management. The problem is that this model left the Union with a major financial presence but less capacity to shape the political order of the space. The European Parliament's own document presents the new pact as a response to a region marked by investment gaps, low economic integration, migration pressure, insecurity and disruptions to routes and supplies.

The second question is what the pact is trying to correct. On paper, it seeks to overcome two clear shortcomings of the previous phase: fragmentation and short-termism. The European Parliament insists that the Mediterranean problem is not only one of security, but also one of low regional integration and economies unable to attract sufficient investment or move up value chains. The Commission, for its part, is trying to bring under a single framework what previously appeared dispersed: energy, digital, security, mobility, investment and supply chains. The implicit message is that Europe can no longer deal with the south through one migration agreement here, one financial package there, or one tactical response to each crisis. It needs a broader architecture.

But what is it actually offering? Here it helps to distinguish between narrative and instruments. The narrative is ambitious: a more integrated, resilient and secure "Common Mediterranean Space", built around three pillars—people, sustainable and integrated economies, and security, preparedness and migration management. The instruments are more concrete: alignment with Global Gateway, investment in digital, energy and transport, and an opening to private financing for Euro-Mediterranean projects.[31] The Commission says that Global Gateway reached its previous €300 billion target ahead of schedule and has set a new one of €400 billion by 2027.[32] It is also using that framework

[31] EUROPEAN COMMISSION. *Global Gateway in the Mediterranean*. European Commission, 2025. Available at: https://north-africa-middle-east-gulf.ec.europa.eu/what-we-do/global-gateway-mediterranean_en (accessed 06/05/2026).

[32] EUROPEAN COMMISSION. *Team Europe reaches €300 billion target for Global Gateway investments ahead of time*. European Commission, 09/10/2025. Available at: https://north-africa-middle-east-

to advance initiatives such as the expansion of the Medusa submarine cable system and calls for renewables and clean technologies in the Mediterranean. The reasonable question, then, is not whether Brussels has a story to tell, but whether it has an offer that is large, visible and credible enough to compete with other actors in the region.

That is where the deeper doubt emerges: is this a sufficiently strategic response, or is it still too limited? Tarek Megerisi of ECFR believes the pact is moving in the right direction, but warns in "The full monty: Why the Mediterranean pact needs to offer the works" that a "menu" approach risks producing only partial, short-term deals; his proposal is to move towards broader package deals combining investment, energy, visas and infrastructure. Richard Youngs, from Carnegie, is less optimistic, arguing in "The EU's Dead-on-Arrival Pact for the Mediterranean" that the new pact could end up as a policy that is "more limited, more defensive", and more subordinated to European geopolitical interests than to a genuinely balanced partnership. Between those two diagnoses lies the real debate around the pact today: Brussels presents it as a "paradigm shift", but the question remains whether it has the political scale, financial weight and credibility to become more than a repackaging of the old neighbourhood policy.

What This Means for Spain

For Spain, the enlarged Mediterranean is not an abstract geopolitical notion but its most immediate strategic environment. It is Europe's southern border, yes, but also a point of connection between Europe, the Maghreb, the Sahel and the maritime corridors linking the Atlantic to the central and eastern Mediterranean. That position creates obvious risks, but also an unusual window of opportunity. If the EU wants to build a more coherent southern strategy, Spain is better placed than many of its partners to act as an energy, logistics and political node. Luis Simón, director of the Elcano Royal Institute's Brussels office, sums it up in "Finding the balance: Russia, the South and the future of Spain's defence": Spanish defence policy must balance Euro-Atlantic solidarity with attention to its "own strategic priorities", among which the south occupies a central place.[33]

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gulf.ec.europa.eu/news/team-europe-reaches-eu300-billion-target-global-gateway-investments-ahead-time-2025-10-09_en (accessed 06/05/2026).

[33] SIMÓN, Luis. "Finding the balance: Russia, the South and the future of Spain's defence". Elcano Royal Institute, 2025. Available at: https://www.realinstitutoelcano.org/en/analyses/finding-the-balance-russia-the-south-and-the-future-of-spains-defence/ (accessed 06/05/2026).

The clearest opportunity lies in the field of energy and interconnection. Brookings notes in "After the energy crisis: Policy responses in the Iberian Peninsula" that the Iberian Peninsula enjoys a competitive advantage in Europe thanks to its renewable base, LNG infrastructure and geographic position.[34] But that advantage remains constrained by a familiar bottleneck: weak connections to the rest of the European electricity market. In 2025, Spain and Portugal reminded Brussels that Iberian electricity interconnection with France still stood at only around 3%, far below the EU's 15% target for 2030,[35] while the European Investment Bank approved €1.6 billion to support the submarine interconnector through the Bay of Biscay.[36] The message is clear: Spain can become a European energy hub, but to do so Europe must treat Iberian connectivity as a strategic issue rather than a peripheral problem.

The risks, however, are just as concrete. Spain is especially exposed to developments in the Maghreb, the rivalry between Algeria and Morocco, instability in the Sahel, and maritime security in the western and central Mediterranean. Spain's 2025–2028 Foreign Action Strategy explicitly identifies the Mediterranean, Africa and the Atlantic as priority spaces,[37] while the National Maritime Security Strategy underlines the need to protect the economic, energy and logistics interests that depend on the sea.[38] That means that, for Spain, the south is not only a diplomatic or migratory issue: it is about maritime security, regional stability, trade routes, critical infrastructure and influence within the EU. The Spanish opportunity lies here: helping Brussels look south in a more strategic, more integrated and less reactive way. But to do so credibly, Madrid needs more than a diagnosis; it needs to turn geography into political proposal.[39]

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[34] BROOKINGS INSTITUTION. "After the energy crisis: Policy responses in the Iberian Peninsula". Brookings, 2025. Available at: https://www.brookings.edu/articles/after-the-energy-crisis-policy-responses-in-the-iberian-peninsula/ (accessed 06/05/2026).

[35] REUTERS. "Spain, Portugal ask EU to push for power links with France after outage". Reuters, 21/05/2025. Available at: https://www.reuters.com/sustainability/boards-policy-regulation/spain-portugal-ask-eu-push-power-links-with-france-after-outage-2025-05-21/ (accessed 05/05/2026).

[36] REUTERS. "EIB backs Spain-France power link with 1.6 billion euros". Reuters, 16/06/2025. Available at: https://www.reuters.com/sustainability/climate-energy/eib-backs-spain-france-power-link-with-16-billion-euros-2025-06-16/ (accessed 05/05/2026).

[37] MINISTRY OF FOREIGN AFFAIRS, EUROPEAN UNION AND COOPERATION. *Foreign Action Strategy 2025–2028*. Government of Spain, 2025. Available at: https://www.exteriores.gob.es/es/PoliticaExterior/Paginas/Estrategia-de-Accion-Exterior-2025-2028.aspx (accessed 05/05/2026).

[38] DEPARTMENT OF NATIONAL SECURITY. *National Maritime Security Strategy 2024*. Government of Spain, 2025. Available at: https://www.dsn.gob.es/sites/default/files/2025-03/ENSM%202024%20Castellano%20Accesible.pdf (accessed 05/05/2026).

[39] SPANISH INSTITUTE FOR STRATEGIC STUDIES. "Spain and its Strategic Maritime Reality". IEEE, Ministry of

Conclusion

Today the Mediterranean is a space where energy, trade routes, digital connectivity, maritime security, great-power rivalry and political fragility intersect. That is precisely why it has returned to the centre of the European agenda. Not because Brussels has suddenly rediscovered a particularly robust Mediterranean ambition, but because the deterioration of the strategic environment compels it to look south with different eyes.

That shift in perspective, however, does not in itself guarantee an effective strategy. The new Pact for the Mediterranean reflects a real awareness: the EU understands that it can no longer approach the region solely through the logic of neighbourhood policy, migration management or ad hoc responses to each crisis. Yet serious doubts remain about its scope, its credibility and its capacity to compete in a space where other actors offer investment, security, infrastructure or mediation more quickly, with fewer conditions and often with greater clarity of purpose. Added to this is a significant internal obstacle: the difficulty Europeans themselves still face in looking at the Mediterranean through a genuinely common lens, in a context where national priorities differ, sensitivities diverge between east and south, and political tempos do not always move in step.

The deeper question is no longer whether the Mediterranean matters, because that is hardly open to debate. The question is whether Europe is prepared to act in it as a strategic actor. For countries such as Spain, that question is even more direct. The south is not an abstract debate, but an immediate reality affecting its energy, maritime security, regional stability and position within the EU. In that sense, the Mediterranean not only forces Europe to rethink its southern policy. It also compels the Union to decide whether it wants merely to manage vulnerabilities or is finally willing to turn this space into a genuine strategic priority.

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Defence, 2025. Available at: https://www.defensa.gob.es/ceseden/-/ieee/espanna-frente-a-su-realidad-estrategica-maritima (accessed 06/05/2026).