

An aerial photograph of a coastal city, likely in the Sahel region, showing a large urban area with a prominent harbor and a long pier extending into the water. The city is surrounded by a vast, arid desert landscape. The water is a deep greenish-blue, and the sky is a pale yellowish-brown.

Giulia Daga and Pier Paolo Raimondi

(eds)

# Mediterranean Transitions from the Gulf to the Sahel

## The Role of Italy and the EU



Edizioni Nuova Cultura



## IAI Research Studies 11



# MEDITERRANEAN TRANSITIONS FROM THE GULF TO THE SAHEL

THE ROLE OF ITALY AND THE EU

*edited by*  
*Giulia Daga and Pier Paolo Raimondi*



Edizioni Nuova Cultura

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Volume produced in the framework of the project "Mediterranean transitions: risks and opportunities for the Italian and European foreign, energy and security policies in the Southern Neighbourhood". This project has benefited from the financial support of the Policy Planning Unit of the Italian Ministry of Foreign Affairs and International Cooperation pursuant to art. 23-bis of Presidential Decree 18/1967. The views expressed in this volume are solely those of the authors and do not necessarily reflect the views of the IAI or the Italian Ministry of Foreign Affairs and International Cooperation.



Ministero degli Affari Esteri  
e della Cooperazione Internazionale

The project has been co-funded by Fondazione Compagnia di San Paolo and in partnership with the Bourse & Bazaar Foundation (B&BF).



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### *Series Editor*

Leo Goretti

First published 2024 by Edizioni Nuova Cultura  
For Istituto Affari Internazionali (IAI)  
Via dei Montecatini 17 – I-00186 Rome  
[www.iai.it](http://www.iai.it)

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ISBN: 9788833657011

DOI: 10.4458/7011

Graphic Composition and Cover design: by Edizioni Nuova Cultura

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## Acknowledgement

The editors would like to thank specifically Carol Ross for her support in the language editing of most of the chapters. They would also like to express their profound thanks to Alessandra Bertino for her meticulous work on editing the manuscript.

## List of abbreviations

ACLED	Armed Conflict Location and Event Data
AQIM	Al-Qaida in the Islamic Maghreb
AU	African Union
bcm	Billion cubic metres
BRI	Belt and Road Initiative
BRICS	Brazil, Russia, India, China, South Africa
BRICS+	Brazil, Russia, India, China, South Africa plus Egypt, Ethiopia, Iran, UAE
CAR	Central African Republic
CASCF	China-Arab States Cooperation Forum
CBAM	Carbon border adjustment mechanism
CCUS	Carbon capture, utilisation and storage
CRMs	Critical raw materials
CSP	Concentrated solar power
DRC	Democratic Republic of Congo
ECOWAS	Economic Community of West African States
EMASOH	European Maritime Awareness in the Strait of Hormuz
ESG	Environmental, Social, Governance
EU	European Union
EUAM	European Union Advisory Mission
EUI	European University Institute
FEEM	Fondazione Eni Enrico Mattei
FLNG	Floating liquefied natural
GCC	Gulf Cooperation Council
GCCIA	Gulf Cooperation Council Interconnection Authority
GDP	Gross domestic product
GW	Gigawatt
IDP	Internally displaced person
IEA	International Energy Agency

IMEC	India Middle East Europe Corridor
ISWAP	Islamic State – West Africa Province
JCPOA	Joint Comprehensive Plan of Action
JETPs	Just Energy Transition Partnerships
JNIM	Jama’a Nusrat ul-Islam wa al-Muslimin
kWh	Kilowatt hours
LAAF	Libyan Arab Armed Forces
LNG	Liquefied natural gas
MEAD	Middle East Air Defence Alliance
MENA	Middle East and north Africa
MESA	Middle East Strategic Alliance
MoU	Memorandum of understanding
m/s	metres per second
NATO	North Atlantic Treaty Organization
NLNG	Nigeria LNG
OCHA	United Nations Office for the Coordination of Humanitarian Affairs
OIC	Organisation of Islamic Cooperation
OPEC	Organization of Petroleum Exporting Countries
OPEC+	OPEC plus non-OPEC oil-producing countries
PCI	Project of common interest
PGII	Partnership for Global Infrastructure and Investment
PMC	Private military company
PRC	People’s Republic of China
PV	Photovoltaic
REEs	Rare earth elements
ROPME	Regional Organization for the Protection of the Marine Environment
SSA	Sub-Saharan Africa
STG	School of Transnational Governance
tCO <sub>2</sub> /cap	Tonnes of CO <sub>2</sub> per capita
TIR	International Road Transport
UAE	United Arab Emirates
UK	United Kingdom
UN	United Nations
US	United States

# Introduction

*Giulia Daga and Pier Paolo Raimondi*

The world is experiencing multiple transformations driven by conflicts, geopolitical realignments, geoeconomics competition, climate and energy crises. These intertwined developments are affecting especially the European Union and its foreign, energy and climate policy. Russia's invasion of Ukraine proved to be a major turning point, which abruptly destroyed the previous energy and political paradigm. Russia had been a key and stable energy supplier to Europe since the Cold War, providing relatively cheap energy instrumental for Europe's industries and households. Despite wavering political tensions, the energy interdependence has grown over the decades ending up into a relationship of overdependence. Since Russia's war on Ukraine, energy security and defence have made their dramatic return to the top of the political agenda in Europe. Alongside, greater geopolitical competition and realignments have taken place across the globe.

In this context, the EU Southern Neighbourhood (the Middle East and North Africa region and Africa) has regained strategic relevance for European interests. Particularly, Italy seeks to seize this opportunity to become the driver of the EU African strategy, building up on its geographical location, in addition to long-lasting positive energy and political relations with several African countries. In this strategy, framed as the Mattei Plan, Italy has decided to elevate and integrate Africa into its foreign policy both at the bilateral and multilateral level (e.g. G7, the EU). Energy is a key pillar of the Mattei Plan as Italy aims at both turning the country into an energy hub and bridge between Europe and Africa and at reducing its dependence on Russia thanks to its old and

new partnerships with multiple Mediterranean and African countries. The new momentum for the Mediterranean needs to reconsider necessarily also the highly strategic Red Sea and Gulf<sup>1</sup> regions, increasingly more interconnected with the Southern Neighbourhood in both political and economic terms. These two regions have experienced several initiatives aimed to reshape regional and international partnerships and alliances. After years of tensions and confrontation (also within the Gulf Cooperation Council), the region seemed to be entered into a phase of increasing realignments and reconciliation, from the Abraham Accords between some Arab countries and Israel since 2020 to the historical deal, brokered by China, between Saudi Arabia and Iran in 2023. The region was set to add an additional piece to the reconciliation puzzle with the expected normalisation between Saudi Arabia and Israel. However, this process was suddenly halted by Hamas attack to Israel on 7 October 2023 and the consequent disproportionate war on Gaza, which has elevated regional tensions.

Both the conflicts on Gaza and on Ukraine have put back under the spotlight enduring economic and security concerns both for regional and global actors. Moreover, the two conflicts have brought back in the academic debate the supporters of a realist approach that considers international relations through the eyes of pragmatic interests, balance of power, and anarchy, and sees cooperation as an instrumental choice rather than a normative endeavour that brings benefit to all. The abrupt arrest of a moment of perceived increasing cooperation, especially in the Middle East, does not limit the importance of previous attempts at regional reconciliations, which need to be scrutinised and assessed in the light of the most recent crises. This volume seeks to engage with both current and long-term dimensions of relational dynamics in the Middle East and Africa, to understand what the main geopolitical and energy transitions in the regions under analysis are, and how these have an impact on European

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<sup>1</sup> The denomination of this basin – and the corresponding sub-region – is still disputed, e.g., between the historical name Persian Gulf, and other more recent political definitions such as Arab Gulf, Arab Persian Gulf, Muslim Gulf. For simplicity, the term Gulf will be used in this work.

and Italian considerations, with an additional emphasis on how global powers influence, exploit, or are impacted by, regional processes.

To reflect on these issues, the volume focuses on the most recent energy and (geo)political realignments involving regional and global actors operating in the wider Mediterranean area and Africa, with an eye to the identification of guidelines for an integrated approach able to respond to the priorities of Italian and European foreign policies.

To do so, the book is articulated over six chapters. The first four chapters address both energy and political developments across the Gulf as well as the Mediterranean and into the Sahel.<sup>2</sup> More specifically, Pier Paolo Raimondi and Mehran Haghirián delve into the perspectives on energy cooperation and partnership across the Mediterranean and into sub-Saharan Africa (Chapter 1) as well as the Gulf (Chapter 2), respectively. Both authors take into account the necessity to propose alternative models for energy partnerships, by promoting investments and cooperation aimed at local developments. Even though they are quite heterogeneous regions, all of them share the need to create new industries, promote socioeconomic development and foster the energy transition. Furthermore, the political and energy developments in each region are reciprocally affected as they are increasingly interlinked. In this sense, Darlington Tshuma focuses, in Chapter 3, on looking at the most recent political developments that connect the Sahel region to North Africa and the Mediterranean, by reflecting on the Italian evolving role in such a challenging landscape. The political dynamics in the Gulf are addressed by Mehran Haghirián in Chapter 4. Particularly, he analyses the impact of the war on Gaza, the war in Yemen, the interconnected Red Sea crisis and a sense of renewed polarisation across the region after a few years of (often contested) normalisations. In Chapter 5, Giulia Daga delves into the role of global actors, notably the United States, China and Russia, in an increasingly interconnected great power competition from the Sahel

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<sup>2</sup>The Sahel is the vast region that stretches from the Atlantic Ocean to the Red Sea along Sahara desert's southern rim. Geopolitically, the Sahel region is made up of 12 countries with Mali, Niger, Burkina Faso, Chad, and Mauritania forming the core of the region. Additional countries include Senegal, Nigeria, Sudan, South Sudan and Eritrea.

to the Gulf through the Mediterranean and the Red Sea. Lastly, Maria Luisa Fantappiè dedicates Chapter 6 to integrating insights across regions and across the energy and political domains. By doing so, the concluding chapter identifies strategies for Italy and the EU to act in line with their strategic objectives without resulting in negative effects on governance and local development of partners.

The book's attention to both regional and global powers over such a broad geographical area stems from two 'apparently' contrasting assumptions: that security dynamics have a strong territoriality, with most security threat perceptions likely to come from one's neighbours;<sup>3</sup> and that the seas unite rather than divide the peoples of the world.<sup>4</sup> Technological advances and economic globalisation have historically enabled great powers to project power far from home to secure their economic and security interests. However, political dynamics remain very local and are often not fully understood by the global powers operating in these areas. The necessity for in-depth and local analyses to fully comprehend domestic and regional dynamics does not exclude the fact that global powers frequently make decisions that significantly affect localities based on their own considerations, which can overlook the reality on the ground and yet can have more impact than regional or local initiatives, often carrying unintended consequences. This is why a holistic approach to energy and political cooperation from the Gulf to the Sahel is needed to be able to more coherently identify policy strategies that can have complementary beneficial effects.

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<sup>3</sup> Barry Buzan and Ole Wæver, *Regions and Powers. The Structure of International Security*, Cambridge, Cambridge University Press, 2003.

<sup>4</sup> Neville Chittick, "East Africa and the Orient: Ports and Trade before the Arrival of the Portuguese", in *Historical Relations Across the Indian Ocean. Report and Papers of the Meeting of Experts Organized by Unesco at Port Louis, Mauritius, from 15 to 19 July 1974*, UNESCO, 1980, p. 13-22, <https://unesdoc.unesco.org/ark:/48223/pf0000042152>.



## 1.

# EU-African Energy and Climate Cooperation in Light of Reconfiguration of Energy Flows

*Pier Paolo Raimondi*

The energy crisis, exacerbated by Russia's war on Ukraine started in 2022, has shaken the global energy markets. The European Union has turned to other producers and exporters for alternative gas supplies in order to prevent energy disruptions and shortages as well as to completely phase out Russian energy imports by 2027 as stated in the European REPowerEU Plan.<sup>1</sup> The Plan consists of three main dimensions: diversification of energy supply, accelerating energy transition and saving energy. In this context, European countries have looked for alternative gas supplies around the world, including Africa. While North African countries already had some interconnections with Europe, the EU has expanded its reach to gas-exporting countries beyond its immediate neighbours. Over the past two years, African countries – also in sub-Saharan Africa (SSA) – have gained a newfound relevance in terms of energy and material supply both in terms of natural gas and hydrogen as well as critical raw materials (CRMs). Currently, the origin of gas supplies to Europe from Africa is highly concentrated in a few countries, namely Algeria (mainly via pipeline) and Nigeria (liquefied natural gas, LNG). In searching for additional gas supplies and routes, member states have engaged also with emerging players in the continent, such as Mozambique, Congo and Tanzania, in view of their gas

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<sup>1</sup> European Commission, *REPowerEU Plan* (COM/2022/230), 18 May 2022, <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=celex:52022DC0230>.

reserves and recent discoveries. However, this new “dash for gas” in Africa has been questioned, and even criticised. The main reasons are the expected decline of EU future gas demand based on the European climate legislations, such as the Fit for 55 package and REPowerEU Plan,<sup>2</sup> alongside the current energy deficit and (growing) domestic needs of African countries – especially in SSA. Moreover, the European search for gas in Africa has been accused of hypocrisy by developing countries at international climate negotiations, especially at the COP27 conference held in Sharm el Sheik, Egypt in 2022. Nonetheless, the new energy and geopolitical landscape provides a fresh momentum for the EU-Africa energy partnership. Such partnership can be broadened to other sectors, such as critical raw materials and hydrogen. African countries’ rising awareness of the opportunities that the transition may bring at the local level, as well as the global competition among several external players in the continent, require the EU to revise its strategy to avoid extractive approaches while promoting sustainable development in Africa.

Energy cooperation between the two continents has been pursued and advocated for many years including the creation of a long-term framework. At the 2007 Lisbon Summit, the EU and Africa head of states launched the Africa-EU Energy Partnership, guided by the EU and African Union, aimed at favouring strategic dialogue on key energy issues. In February 2022, the EU proposed a new Africa-EU Green Energy Partnership, which is under the Global Gateway Investment package. Furthermore, the EU is also part of the Just Energy Transition Partnerships (JETPs) with South Africa, launched in 2021, and Senegal, launched in 2023. The JETPs envisage 3 billion euros and 2.5 billion euros, respectively, for supporting national climate objectives and accelerating renewables. African countries are increasingly betting on clean energy and climate policies to address its energy challenges. For example, the African Union (AU) presented its Agenda 2063, which represents the blueprint and master plan for positioning Africa into a more sustainable and inclu-

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<sup>2</sup> Ibid.

sive pathway for its socioeconomic development.<sup>3</sup> Moreover, African leaders presented the Nairobi Declaration at the Africa Climate Summit held in Kenya in 2023. The Declaration embodies the common position of African countries on global climate change. Based on this declaration, African leaders seek to increase the continent's renewable generation capacity to at least 300 GW by 2030 – thanks also to the international support.<sup>4</sup> Within this framework, European and African leaders will need to cooperate to create and enhance win-win partnership.

Among EU member states, Italy seeks to increase its relevance in shaping the EU's Africa strategy with the launch of its Mattei Plan, which foresees a critical role for energy partnerships, leveraging its long-lasting positive political and energy relations with several African countries. Nonetheless, multiple challenges need to be addressed by European and Italian officials in order to successfully design a new energy and climate partnership with African countries.

### *1.1 Current EU-Africa energy trade and perspectives for higher contribution*

The current energy trade between Africa and Europe is dominated by two players, namely Algeria (via pipeline) and Nigeria (LNG). These two countries supplied 31.5 bcm and 12 bcm in 2022, respectively.<sup>5</sup> Among other African gas suppliers are Egypt (6.5 bcm), Angola (2.9 bcm) and Libya (2.5 bcm).<sup>6</sup> In 2022, Algeria was the largest African gas supplier volume-wise with a total 39 bcm<sup>7</sup> (figure 1). In total, African countries accounted for 14 per cent of EU gas imports in 2022.

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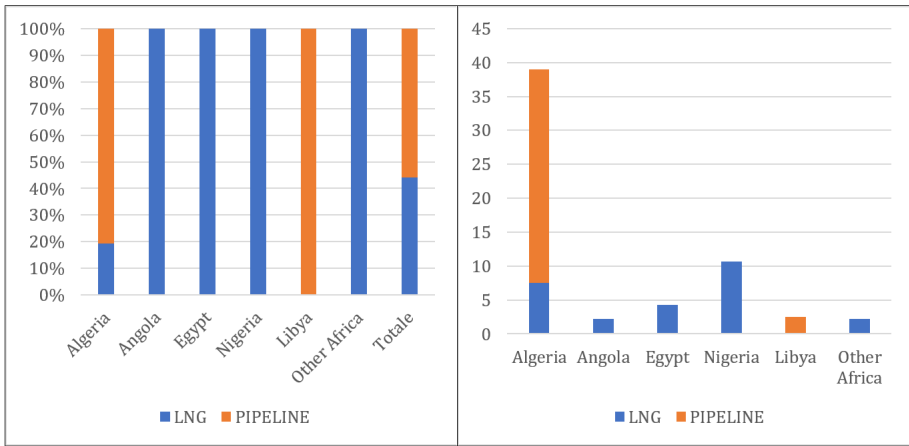
<sup>3</sup> African Union, *Agenda 2063: The Africa We Want*, 2015, [https://au.int/Agenda2063/popular\\_version](https://au.int/Agenda2063/popular_version).

<sup>4</sup> Margherita Bianchi, "How the G7 Can Effectively Back Africa's Twin Goal of Energy Access and Transition", in *IAI Commentaries*, No. 24|26 (June 2024), <https://www.iai.it/en/node/18601>.

<sup>5</sup> Energy Institute, *Statistical Review of World Energy 2023*, June 2023, [https://www.energyinst.org/\\_data/assets/pdf\\_file/0004/1055542/EI\\_Stat\\_Review\\_PDF\\_single\\_3.pdf](https://www.energyinst.org/_data/assets/pdf_file/0004/1055542/EI_Stat_Review_PDF_single_3.pdf).

<sup>6</sup> Ibid.

<sup>7</sup> LNG 7.5 bcm and pipeline 31.5 bcm in 2022.

**Figure 1** | Share of transport mode (right) and volume (left) of exports from African countries to the EU, 2022

Source: Author's elaboration on Energy Institute, *Statistical Review of World Energy 2023*, cit.

The Russian war on Ukraine has provided a new momentum for EU-African energy trade. Africa holds 12.9 trillion cubic metres (tcm), equal to almost 7 per cent of world's proven gas reserves in 2020.<sup>8</sup> While there are a few consolidated producers, there are also emerging players as major new gas developments have appeared across the continent, notably Mozambique, Senegal, Tanzania and Namibia. These developments accounted for over 40 per cent of global gas discoveries between 2011 and 2018.<sup>9</sup> A clear example is East Africa, which has been one of the main hotspots for LNG projects globally since 2009. Particularly, discoveries in Mozambique and Tanzania, with reserves estimated at 2.8 and 1.3 tcm, respectively, were welcomed with great enthusiasm by the global markets. Both countries have been developing export-driven LNG projects, which are expected to be launched in the late 2020s.

Different EU member states have engaged with African countries to increase both pipeline and LNG supplies, although the EU appeared to be playing a restraining role with respect to increase national fossil fuels

<sup>8</sup> Energy Institute, *Statistical Review of World Energy 2023*, cit.

<sup>9</sup> International Energy Agency (IEA), *Africa Energy Outlook 2019*, November 2019, <https://www.iea.org/reports/africa-energy-outlook-2019>.

import infrastructure, in line with its climate ambitions. Ideally, piped gas represents the least-cost option as the four pipelines linked to Europe are largely underutilised.<sup>10</sup> At the same time, the EU has favoured LNG supplies to further increase diversification and flexibility. Nonetheless, future and higher contribution of both piped gas and LNG from African countries face some headwinds.

### *Pipelines*

Although Algeria has gained a newfound relevance – especially for Italy’s energy security – by increasing gas exports, the main challenges for additional gas volumes is Algeria’s gas output. The country has to attract additional investments and improve the regulatory framework as its domestic gas consumption has risen over the past decades. So far, the country has announced some improvements on the regulatory framework, but Algeria seeks to further explore and exploit its gas reserves (including shale gas reserves) to increase gas production and fully utilise its gas pipelines. By contrast, Libya’s potential is severely hindered by military and political instability since 2011.<sup>11</sup> There have been discussions over other pipeline projects, notably the 10 bcm EastMed pipeline from the Leviathan basin to Italy via Cyprus and Greece and the 30 bcm Trans-Saharan gas pipeline connecting Nigeria to Algeria via Niger and ideally exporting to Europe. However, both projects face energy, economic and security issues.

The EastMed pipeline has the merit of ideally ensuring diversification of both supply and routes. Moreover, the pipeline could be hydrogen-ready and this is why it was included in the EU project of common interest (PCI) list.<sup>12</sup> Nonetheless, limited gas production and geopolitical developments, not least the Hamas attack on Israel and the consequent

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<sup>10</sup> Greenstream; TransMed; MedGaz; GME. For more info: Pier Paolo Raimondi, *Natural Gas in Italy: Features and Perspectives in Light of Russia’s War in Ukraine*, Rome, IAI, September 2022, <https://www.iai.it/en/node/15987>.

<sup>11</sup> Ibid.

<sup>12</sup> Pier Paolo Raimondi, “Eastern Mediterranean Energy Resources between Energy Security and Energy Transition: A Regional Perspective: A Regional Perspective”, in *IAI Papers*, No. 22|11 (May 2022), <https://www.iai.it/en/node/15482>.

war, affect future energy cooperation in the area and ultimately the project's feasibility in the short and medium term. Regarding the Trans-Saharan gas pipeline, Algeria, Niger and Nigeria signed a memorandum of understanding (MoU) for the 4,000 km pipeline in 2022. However, it is unlikely that the project will come online in light of security threats – including following the military coup in Niger – as well as energy and economic hurdles in Nigeria. Political support for an international pipeline to Europe is further diminished as European gas demand is expected to decline. Therefore, the EU favours LNG while using spare capacity in existing pipelines where possible.

## LNG

Africa's LNG export capacity is just over 100 bcm. Among SSA countries, Nigeria is the main LNG supplier to Europe (19.6 out of 53.9 bcm in 2022). The country however is experiencing serious infrastructure and energy challenges, such as chronic electricity shortages. Despite these hurdles, Nigeria is expanding the capacity of its Nigeria LNG (NLNG) plant, adding about 11 bcm of capacity by the second half of the 2020s.<sup>13</sup> Contemporarily, the other relevant LNG supplier, Egypt, is experiencing gas shortages due to the combination of declining production and rising consumption. As a result, Egypt has increased its reliance on Israeli gas imports to continue exporting. Nonetheless, Egypt reduced its LNG exports to Europe in 2023 compared to 2022. Algeria has two LNG export facilities, which are underutilised despite high prices and geographical proximity, given the challenges on the supply side.

Meanwhile, new gas players are expected to emerge outside the traditional ones, such as Mozambique, Namibia, Tanzania, Senegal, Mauritania and Republic of Congo. According to the International Energy Agency (IEA), new projects could add some 90 bcm of annual LNG capacity by 2030.<sup>14</sup> However, only 17 bcm is expected to be commissioned by 2026.

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<sup>13</sup> Mostefa Ouki, "African Gas Supplies to Europe: Between Hopes and Hard Realities", in *Oxford Energy Comments*, July 2022, <https://www.oxfordenergy.org/?p=45092>.

<sup>14</sup> IEA, *Medium-Term Gas Report 2023*, October 2023, <https://www.iea.org/reports/medium-term-gas-report-2023>.

Indeed, African countries have struggled with LNG expansion over the past years. The rising use of floating liquefied natural gas (FLNG) facilities, such as in the case of Mozambique, Mauritania and Senegal as well as Congo Brazzaville, could contribute to additional supplies. In November 2022, the first cargo departed from the Coral South FLNG in Mozambique,<sup>15</sup> while the start-up of Greater Tortue Ahmeyim FLNG in Mauritania as well as Senegal and Congo FLNG are expected in 2024 and 2025. These projects are set to add over 12 bcm/y of liquefaction capacity.

Nonetheless, all African LNG exporters are expected to face strong competition from major players, namely Qatar and the US, in the medium and long term. These two LNG giants have competitive advantages in terms of political stability, financial capabilities and energy resources. In all these fields, African countries are weaker and rely more on international funding. Furthermore, new LNG capacity in Africa is expected to be launched by the end of the 2020s, when the European gas demand is expected to drastically decline given higher renewable capacity, energy efficiency improvements and lower demand in the industrial sector.

Also environmentally, African gas could be experiencing higher scrutiny from European partners. Indeed, the EU has recently adopted its Methane Regulation,<sup>16</sup> which envisages thresholds for oil and gas imports. However, many African countries have a high methane emission and carbon intensity rates due to gas flaring and venting, lower investments and technological deployment as well as geology. For example, Nigeria is responsible for around 60 per cent of SSA's gas flaring, followed by Angola, Congo and Gabon.<sup>17</sup> Reducing methane emissions has environmental, energy and economic merits. This could further consolidate mutually beneficial EU-African partnerships.

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<sup>15</sup> ENI, *Mozambique's First LNG Cargo Departs from Coral Sul FLNG, Offshore the Rovuma Basin*, 13 November 2022, <https://www.eni.com/en-IT/media/press-release/2022/11/eni-coral-first-cargo.html>.

<sup>16</sup> European Commission DG Energy website: *Methane Emissions*, [https://energy.ec.europa.eu/node/5573\\_en](https://energy.ec.europa.eu/node/5573_en).

<sup>17</sup> Manfred Hafner, Simone Tagliapietra and Lucia de Strasser, *Energy in Africa. Challenges and Opportunities*, Cham, Springer, 2018, <https://doi.org/10.1007/978-3-319-92219-5>.

## 1.2 Potential future contribution – critical raw materials and hydrogen

While engaging with African countries for gas supplies, Europeans have not cooled their climate objectives. Decarbonisation policies are providing strategic relevance to critical minerals and materials, which are vital and irreplaceable inputs for clean and digital technologies. Indeed, the global energy system is expected to become mineral-intensive and the EU is heavily dependent on imports. The combination of consistent decarbonisation policies, rising global competition on clean technologies and a growing focus on economic security has put Africa's vast mineral resources under the spotlight. Given climate and industrial policies, global demand for critical raw materials is expected to rise drastically in the coming years, potentially leading to price spikes and geopolitical risks. According to the IEA, demand of CRMs is expected to quadruple by 2040,<sup>18</sup> while the EU demand for selected minerals, such as rare earth elements and lithium, is expected to rise between six to 12-fold by 2030, respectively.<sup>19</sup>

In view of expanding global demand, Africa can become even more relevant as it holds significant CRM reserves. For example, the continent holds around 40 per cent of the global manganese reserves, 20 per cent of the world's uranium as well as untapped resources of other minerals such as lithium and nickel. Moreover, some African countries are large suppliers to the global market in the case of cobalt, platinum group metals and manganese. For example, Zimbabwe, Democratic Republic of Congo (DRC) and Mali hold relevant but still untapped lithium deposits. South Africa, Gabon and Ghana collectively hold over 60 per cent of the global manganese reserves.<sup>20</sup> Other countries like Guinea, Mozambique,

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<sup>18</sup> IEA, *The Role of Critical Raw Materials in Clean Energy Transition*, May 2021, <https://www.iea.org/reports/the-role-of-critical-minerals-in-clean-energy-transitions>.

<sup>19</sup> Samuel Carrara et al., "Supply Chain Analysis and Material Demands Forecast in Strategic Technologies and Sectors in the EU – A Foresight Study", in *JRC Science for Policy Reports*, 2023, <https://doi.org/10.2760/386650>.

<sup>20</sup> Wenjie Chen, Athene Laws and Nico Valckx, "Harnessing Sub-Saharan Africa's Critical Mineral Wealth", in *IMF News*, 29 April 2024, <https://www.imf.org/en/News/Articles/2024/04/29/cf-harnessing-sub-saharan-africas-critical-mineral-wealth>.



South Africa and Zambia have significant critical mineral reserves. Great interest is also being generated in African reserves of rare earth elements (REEs), which could reduce China's dominance of the value chain.<sup>21</sup> The African continent is home to numerous REE deposits, especially in eastern and southern areas including the Republic of South Africa, Madagascar, Malawi, Kenya, Namibia, Mozambique, Tanzania, Zambia and Burundi.<sup>22</sup> Beyond their large reserves, African countries are also relevant for the actual production of such minerals. The DRC is one of the world's largest cobalt producers, accounting for 70 per cent of world's cobalt production, while Rwanda is the world's largest tantalum exporter.<sup>23</sup> African countries account also for a sizeable share in the production of other mineral resources such as bauxite, graphite and copper.<sup>24</sup>

Given the global interest in these resources, the mining sector can be relevant for attracting investments, technologies and generating economic growth in Africa. For example, the sector has also been one of the main recipients of foreign direct investment in the region.<sup>25</sup> Mineral activities already contribute to the African economy as mineral production represents around 8 per cent of government revenues in resource-rich African countries. For example, minerals represent over 30 per cent of total product exports in 23 African countries.<sup>26</sup> The EU itself has engaged with several African countries to ensure the supply of minerals. At the same time, African governments need to design and improve governance in order to distribute economic benefits to the entire population in order to avoid the risk of future 'resource curse'.

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<sup>21</sup> Ian Coles, "Africa Holds Promise of Rare Earth Riches", in *Financial Times*, 6 March 2017, <https://www.ft.com/content/88abbe52-0261-11e7-aa5b-6bb07f5c8e12>.

<sup>22</sup> Pier Paolo Raimondi, "The Scramble for Africa's Rare Earths: China Is Not Alone", in *ISPI Newsletter*, 4 June 2021, <https://www.ispionline.it/en?p=54046>.

<sup>23</sup> International Renewable Energy Agency (IRENA) and African Development Bank (AfDB), *Renewable Energy Market Analysis: Africa and Its Regions*, Abu Dhabi and Abidjan, IRENA and AfDB, January 2022, <https://www.irena.org/publications/2022/Jan/Renewable-Energy-Market-Analysis-Africa>.

<sup>24</sup> IEA, *Africa Energy Outlook 2022*, June 2022, <https://www.iea.org/reports/africa-energy-outlook-2022>.

<sup>25</sup> IEA, *Africa Energy Outlook 2022*, cit.

<sup>26</sup> Ibid.

In doing so, African countries look to exploit and leverage the global competition among powers, coupled with the global energy transition, for the greatest economic and political gain. Furthermore, countries will prefer to expand processing and refining capacity locally along with manufacturing capacities. This would boost value added, ensure higher returns, create more jobs and ensure global energy security through diversification. For example, selling raw bauxite generates around 65 dollars per ton, while when processed into aluminium it commands over 2,000 dollars, in end-2023 prices.<sup>27</sup> Unfortunately, most of the minerals extracted in Africa are exported to and dependent on midstream third countries (namely China) and hence do not produce higher returns. Nonetheless, rising awareness of industrial and economic opportunities has induced some countries to consider an export ban on raw materials. At the same time, there is a high risk of new resource nationalism and competition.

The EU seeks to build strategic partnerships with key mineral-rich and producing countries to enhance global supply chains and ensure energy security. In November 2022, the EU signed an MoU with Namibia establishing a strategic partnership on sustainable Raw Materials Value Chains and Renewable Hydrogen. In October 2023, the two sides agreed on an operational roadmap detailing the next steps and goals of the partnership for the period 2023–2025, including a study on the development of the Walvis Bay port.<sup>28</sup> The partnership is supported by 1 billion euros in investment provided by the EU, its member states and EU financial institutions. Moreover, the EU has signed MoUs for a strategic partnership on critical and strategic raw materials value chains with several African countries, among others with DRC, Zambia and Rwanda for a strategic partnership on sustainable raw materials value chains.<sup>29</sup>

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<sup>27</sup> Wenjie Chen, Athene Laws and Nico Valckx, “Harnessing Sub-Saharan Africa’s Critical Mineral Wealth”, cit.

<sup>28</sup> European Commission, *Global Gateway: EU and Namibia Agree on Next Steps of Strategic Partnership on Sustainable Raw Materials and Green Hydrogen*, 24 October 2023, [https://ec.europa.eu/commission/presscorner/detail/en/IP\\_23\\_5263](https://ec.europa.eu/commission/presscorner/detail/en/IP_23_5263).

<sup>29</sup> European Commission, *Global Gateway: EU Signs Strategic Partnerships on Critical Raw Materials Value Chains with DRC And Zambia and Advances Cooperation with US and*

Another future area of cooperation between the EU and Africa is hydrogen. The EU has increased its clean hydrogen import target for 2030 to 10 million tons as outlined in the REPowerEU Plan. Hydrogen could play a significant role in decarbonising hard-to-abate sectors, such as heavy and energy-intensive industries. Ideally, Africa could produce green hydrogen at a very competitive price, and the IEA estimates the continent could yield 5,000 megatonnes per year, corresponding to ten times the amount of low-carbon hydrogen needed globally in 2050 under the IEA's Net Zero Emissions by 2050 Scenario, at less than 2 dollars/kg with further cost declines.<sup>30</sup> Given this potential, the EU institutions and member states have signed several MoUs to produce and import clean hydrogen from African countries such as Namibia, Mauritania, Morocco and Egypt. The EU and Namibia announced the operation roadmap for renewable hydrogen supply – a unique development so far. Several member states have also engaged bilaterally with African countries for establishing hydrogen trade. North African countries, especially Algeria, could ideally become relevant hydrogen suppliers to Europe given the existing infrastructure. At the same time, the need to include local industrial development related to hydrogen partnerships is gaining traction. Furthermore, these countries could consider using their hydrogen domestically and exporting semifinal or final decarbonised products (fertilisers, aluminium, iron and steel) to move down the chain and create more added value. In doing so, African countries could reduce their liability vis-à-vis the European carbon border adjustment mechanism (CBAM) and overcome the challenges related to long-distance hydrogen trade. Lastly, it is crucial that European countries work with African ones in addressing and assessing emissions from the entire value chain of hydrogen in order to develop it in the most sustainable way possible.

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*Other Key Partners to Develop the 'Lobito Corridor'*, 26 October 2023, [https://ec.europa.eu/commission/presscorner/detail/en/IP\\_23\\_5303](https://ec.europa.eu/commission/presscorner/detail/en/IP_23_5303).

<sup>30</sup> Fatih Birol, "Africa Has the Most to Gain from Clean Energy Transitions", in *Groupe d'études géopolitiques*, 29 June 2022, <https://geopolitique.eu/en/2022/06/29/africa-has-the-most-to-gain-from-clean-energy-transition>.

### 1.3 Domestic energy needs

Energy – in the form of both hydrocarbons and renewables – embodies Africa’s energy paradox. While the continent is richly endowed with vast resources, it is at the same time the most energy-deficient continent in the world. This mismatch represents one of the greatest challenges and obstacles for Africa’s socioeconomic growth. Based on the current situation in terms of energy access (or the lack of it), the African continent can be divided into three regions: North African countries, sub-Saharan countries and the Republic of South Africa. North African countries enjoy almost a universal access to electricity and most households have access to clean cooking. While this condition is quite similar in South Africa thanks mainly to coal (raising worrying environmental issues), in SSA most people have no access to electricity (around 600 million) and still rely on solid biomass for cooking (around 881 million). Africa’s population is expected to grow to 2.5 billion people by 2050 (with a consequent increase in urban dwellers), further pushing governments and municipalities to pursue and implement policies for electricity access and clean cooking.

The lack of energy access is also visible in terms of average power consumption per capita, which is below 200 kilowatt hours (kWh) in SSA. To put this rate into context, it is below other regions’ consumption<sup>31</sup> but also lower than what is needed to power a typical refrigerator in a year.<sup>32</sup> This condition highlights that for African countries the top priority is to ensure energy access. Nonetheless, there are some differences in terms of electricity access rate and positive developments among sub-regions and countries. For example, Eastern Africa has seen a significant growth in electricity access as it has more than quadrupled the access rate between 2000 and 2020 (figure 2). Indeed,

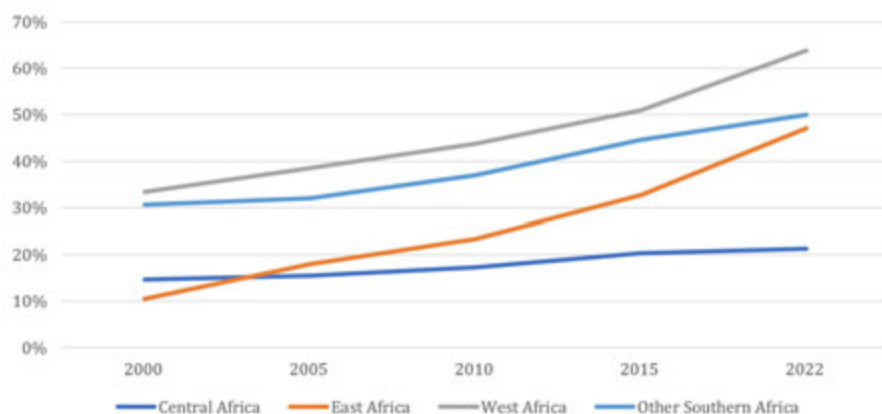
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<sup>31</sup> Emerging Asian economies 2,100 kWh, the global average 2,885 kWh, Europe 5,100 kWh, and the USA above 10,000 kWh. See: Lapo Pistelli, “Addressing Africa’s Energy Dilemma”, in Manfred Hafner and Simone Tagliapietra (eds), *The Geopolitics of the Global Energy Transition*, Cham, Springer, 2020, p. 151-174, [https://doi.org/10.1007/978-3-030-39066-2\\_7](https://doi.org/10.1007/978-3-030-39066-2_7).

<sup>32</sup> Todd Moss, “My Fridge Versus Power Africa”, in *CGDEV Blog*, 9 September 2013, <https://www.cgdev.org/node/3120805>.

countries like Kenya, Ethiopia and Rwanda have experienced a relevant improvement. By contrast, Central Africa, which in 2000 had similar electrification rates as East Africa (15 and 10 per cent respectively), has lagged behind as also visible in the rate of economic growth.<sup>33</sup> Indeed, to a large extent countries cannot achieve economic growth without electrification.

**Figure 2** | Share of population with access to electricity in African sub-regions, 2000–2022



Source: Author's elaboration on IEA data.

The dramatic energy deficit is visible also in terms of emissions. Africa accounts for less than 3 per cent of the world's energy-related CO<sub>2</sub> emissions and has the lowest per capita emissions of any world region despite accounting for nearly one-fifth of the world's population and being disproportionally exposed to the damages caused by global warming and climate change.<sup>34</sup> In 2020, Africa's average rate of emissions per capita was 0.9 tonnes (tCO<sub>2</sub>/cap) compared to 6.1 tCO<sub>2</sub>/cap in the EU, 17.7 in the US, 7.6 in China and a world average of 4.5 tCO<sub>2</sub>/cap.

<sup>33</sup> Manfred Hafner, Simone Tagliapietra and Lucia de Strasser, *Energy in Africa*, cit.

<sup>34</sup> Aloysius Uche Ordu, Arunma Oteh and Jeanine Mabunda Lioko, "Enlightened Climate Policy for Africa", in *Brookings Commentaries*, 25 October 2021, <https://www.brookings.edu/?p=1529254>.

Against this backdrop, the current top priority for African governments is to provide adequate and reliable energy access to spur socio-economic development. A big discussion regards the role of natural gas in Africa's energy future. Natural gas can be seen as a useful energy source because it displaces oil, it provides dispatchable energy, and it can cover certain sectors where renewables and electrification are not efficient. Natural gas has become relevant more recently because hydrocarbon development in SSA is heavily dependent on international oil companies' interests. Compared to North African countries that have national oil companies, have used oil revenues for the country's development, and have found more readily remunerative external markets in Europe, SSA countries have relied on international oil companies to develop their gas reserves. However, domestic markets in SSA have been considered too small and generally too distant from major importing markets, leading to higher costs.

Renewables can substantially contribute to address the African energy deficit especially in the rural areas, where the most people (60 per cent of the SSA population) live, thanks to decentralised solutions such as off-grid and mini-grids. Africa is endowed with vast renewable power generation potential, estimated by the IEA as 350 GW for hydroelectric, 110 GW for wind, 15 GW for geothermal and a remarkable 1,000 GW for solar. This potential could contribute to ensuring energy supply to rising populations in a sustainable manner (the so-called energy leapfrogging). However, modern renewable sources (solar, wind, geothermal and modern bioenergy) cover a marginal portion of Africa's energy mix (less than 1 per cent of Africa's total primary energy supply and about 5 per cent of its total electricity generation). In 2023, renewable capacity was 62 GW, which should be increased up to 300 GW according to the Nairobi Declaration.<sup>35</sup> For example, despite the great solar potential only 1 per cent of global installed solar PV capacity is in Africa. The limited expansion of renewables in Africa is motivated by policy uncertainties, inadequate infrastructure and grids, unstable financial situations and

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<sup>35</sup> IRENA, *Renewable Capacity Statistics 2024*, March 2024, <https://www.irena.org/Publications/2024/Mar/Renewable-capacity-statistics-2024>.

limited access to private and foreign financing. Indeed, Africa attracts less than 2 per cent of world spending on clean energy. To meet rising energy needs, massive investment for installation of power generation, coupled with both expansion of the national grid and leveraging on off-grid solutions, are required. According to the IEA, achieving Africa's energy development and climate goals requires energy investment to more than double from today's 90 billion dollars by 2030, at which point nearly two-thirds of spending would go to clean energy.<sup>36</sup> According to Climate Policy Initiative, 277 billion dollars is needed annually over the 2020–2030 period for African countries to fully implement their mitigation and adaptation plans under the Paris Agreement.

#### *1.4 Different challenges to EU-Africa cooperation*

Despite the new energy and political momentum for EU-Africa cooperation, future cooperation will need to address and overcome several political, economic and energy issues. In general, the African continent has been severely hit by multiple crises over the past years, such as political and military crises, energy and food insecurity, disruption of supply chains, rising cost of capital and sovereign debt crisis. As a result, countries have experienced financial and fiscal instability making it even more difficult to attract the investments needed for socioeconomic and sustainable development.

##### *Political challenges: Growing misunderstanding and greater competition*

The EU has lost gradually its position in the African continent and the two continents have been frustrated by rising misunderstanding on several issues. A key reason for this frustration is the different perspectives and preferences on the future trajectories and solutions for the energy transition. The EU seeks to reduce its emissions, while the African continent prioritises expanding energy access and favouring socioeconomic

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<sup>36</sup> IEA, *Financing Clean Energy in Africa*, September 2023, <https://www.iea.org/reports/financing-clean-energy-in-africa>.

growth. These different starting points, simplified as renewables vs. fossil fuels, have generated growing misunderstanding and frustrations between the two sides. For example, African countries have acknowledged the role of gas for a just and orderly transition,<sup>37</sup> while accusing Europe of hypocrisy because of its dash for gas in the aftermath of Russia's war in Ukraine. Furthermore, this divergence has hindered EU financial contribution to Africa's energy development. Indeed, the EU has pledged to cease investment for oil and gas projects along with the finalisation of its Sustainable Taxonomy. Unfortunately, these decisions can cause a vacuum that can be easily filled by other competitors that are more comfortable to ensure investment for Africa's energy projects.

Indeed, Europeans have also experienced higher global competition from traditional players, such as China, Russia and the United States, but also from emerging powers, notably the United Arab Emirates (UAE) and Turkey. In some cases, these players have engaged with African countries promoting and accepting a different approach to energy and climate issues compared to the one proposed by the EU. For example, China and the UAE have combined investments and cooperation both on fossil fuels and on low-carbon technologies. Russia has also expanded its role in mineral and energy projects in Africa by providing also security cooperation.<sup>38</sup>

The EU remains Africa's first commercial partner, but its share has been consistently eroding in the last two decades. Conversely China has increased its relevance and presence in the continent both economically and politically also in those countries that signed strategic partnerships with the EU.<sup>39</sup> While European countries invested less than 60 billion

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<sup>37</sup> Dania Saadi, "Africa Embraces Gas in Energy Transition Debate amid Fears of Insecure Supplies", in *S&P Global Commodity Insights*, 8 November 2021, <https://www.spglobal.com/commodityinsights/en/market-insights/latest-news/oil/110821-africa-embraces-gas-in-energy-transition-debate-amid-fears-of-secure-supplies>.

<sup>38</sup> Rosemary Griffin and Charlie Mitchell, "Russia Reshaping Africa Energy Links after Ukraine Invasion", in *S&P Global Commodity Insights*, 27 July 2023, <https://www.spglobal.com/commodityinsights/en/market-insights/latest-news/oil/072623-russia-reshaping-africa-energy-links-after-ukraine-invasion>.

<sup>39</sup> Xinhua, *China, DRC Upgrade Ties to Comprehensive Strategic Cooperative Partnership*, in *Qiushi Journal*, 29 May 2023, [http://subsites.chinadaily.com.cn/Qiushi/2023-05/29/c\\_890354.htm](http://subsites.chinadaily.com.cn/Qiushi/2023-05/29/c_890354.htm).



dollars between 2000 and 2016, China has been the main investor on the continent providing over 70 billion dollars<sup>40</sup> – although triggering the accusation of creating a ‘debt trap’. Nonetheless, China has been seen as a favourable partner because its money does not come with clauses dictating policy reforms, democratisation and human rights. Another area where the EU is lagging behind China is in the mining sector. Beijing has consistently increased its foothold in Africa’s mining sector (often overlooking high ESG standards) over the past two decades thanks to its state-owned companies and investment. Indeed, Chinese firms owned or had a stake in 15 out of 19 cobalt-producing mines in Congo in 2020.<sup>41</sup>

Besides uncoordinated foreign policy and engagement among EU member states in Africa, the EU has experienced growing political setbacks in its presence in Africa, especially France in the Sahel region, following multiple coups over the recent years. In several areas, colonial heritage is a major political barrier and cause of distrust. The new engagement based on climate policy and sustainable energy has to overcome critiques on green extractivism and colonialism. At the same time, African countries, and in general the so-called Global South, are becoming more committed to seize socioeconomic opportunities given the new geopolitical landscape characterised by higher competition and a focus on economic security.

### *Internal challenges: Dilemmas and reforms*

Additional challenges to deepen EU-Africa cooperation come from within the EU. Indeed, the EU has been facing the consequences of the first global energy crisis in 2022. European countries, households and companies experienced record energy prices, which remain higher than pre-crisis levels despite dropping in 2023. Higher energy prices entail negative competitive consequences for European industries contributing to the

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<sup>40</sup> Guillaume Arditti, “EU-Africa: Towards a Renewal of the Relationship”, in *Jacques Delors Institute Infographics*, April 2024, <https://institutdelors.eu/en/publications/eu-africa-towards-a-renewal-of-the-relationship>.

<sup>41</sup> Economist, “How Chinese Firms Have Changed Africa”, in *The Economist*, 20 May 2022, <https://www.economist.com/special-report/2022/05/20/how-chinese-firms-have-changed-africa>.

widespread fear of de-industrialisation and the potential inability to develop industrial capacity compatible with a low-carbon future. Given higher and volatile prices, Europeans are expected to face ever-growing trade-offs between subsidising their own industries (and continuing to favour raw materials imports) and importing final decarbonised products hence losing some industrial capacity. Nonetheless, if Europeans pursue a more 'nationalistic' strategy without taking into account African needs, they would further lose relevance in the continent.

Domestic challenges are not only limited to the EU, but also extend to Africa. In this case, however, an additional challenge for further energy cooperation regards political and regulatory issues in several African countries. Political instability and regulatory uncertainties discourage international investment, particularly from the private sector. To attract more investments, governments need to reform also the energy sector. Indeed, too often energy and power markets are dominated by vertically integrated state-owned companies thereby hindering private sector involvement. However, public utilities often face challenges in investing in energy infrastructure due to consumers' poverty, a high level of debt and limited fiscal capacity. Without adequate reforms, African countries will struggle to attract international investments. Africa would require investment of 25 billion dollars per year in order to achieve full access to modern energy by 2030, according to the IEA's estimates. Almost half of this figure would need to be mainly allocated to just five countries: DRC, Nigeria, Ethiopia, Tanzania and Uganda. Obviously, the EU cannot provide this figure in its entirety, but it can enhance and streamline financial support to the countries most in need.

### *1.5 The Italian Mattei Plan: A positive initial step*

Given the reconfiguration of global energy flows and the positive political and energy relations that Italy has with several African countries, the Italian government seeks to become the preferred European interlocutor with the African continent. To do so, Italy presented its African strategy, called the Mattei Plan, at the Italy-Africa Summit on 29 January 2024. The Plan aims at avoiding a top-down approach driven by the old donor-recipient paradigm. Indeed, the aim is to promote win-win partnerships with African countries. The Plan favours and pursues an

“incremental approach” as key goals and targets are co-designed with the partners.<sup>42</sup> This aspect is critical to win the hearts and minds of African counterparts, as highlighted for instance by Moussa Faki, chair of the AU Commission, who warned about a lack of consultation with African countries in designing the Mattei Plan. At the same time, Mr. Faki welcomed the paradigm shift and expressed his hope and ambition for future cooperation.

So far, the Italian government has announced an initial budget of 5.5 billion euros comprising grants, credits and guarantees.<sup>43</sup> The figure is possible thanks to the redirection of 3 billion euros from the Italian Climate Fund and 2.5 billion from the development cooperation budget. However, the limited financial capabilities require a more integrated and coordinated initiative with existing European programmes and funds. Furthermore, Italy will need to clarify how funds and projects are allocated and selected. For example, it is crucial to elucidate counterparts on whether projects will receive funds in the form of development aids or donation. Addressing these issues is essential to accelerate the launch of concrete projects. Italy seeks to deliver short-term results through pilot projects as well as identify new projects and partnerships beyond the initial geographical scope by highlighting the commitment to become a credible partner in Africa’s socioeconomic development.

The approach pursued hopes to overcome the aforementioned challenges for deeper EU-African relations. As a first stage, the Plan identifies nine countries where initial pilot projects are being launched: Algeria, Congo Brazzaville, Cote d’Ivoire, Egypt, Ethiopia, Kenya, Morocco, Mozambique and Tunisia. Italy has several long-lasting economic, political and energy relations with these countries. In light of the reconfiguration of global energy flows, Italy aims to become an energy hub in the Mediterranean region a bridge between Africa and Europe, enhancing also the EU energy security as a whole. In this regard, energy is one of the key pillars of the Mattei Plan –

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<sup>42</sup> Daniele Fattibene and Stefano Manservigi, “The Mattei Plan for Africa: A Turning Point for Italy’s Development Cooperation Policy?”, in *IAI Commentaries*, No. 24|10 (March 2024), <https://www.iai.it/en/node/18219>.

<sup>43</sup> Italian Government, *President Meloni’s Opening Address at the Italia-Africa Summit*, 29 January 2024, <https://www.governo.it/en/node/24861>.

alongside health, infrastructure, agriculture, education and water. Given its role as a market, Italy should promote energy cooperation also in the methane emission and hydrogen sphere in line with the latest EU regulations by leveraging its positive relations with several African countries.

## 1.6 Conclusion

Although the energy and geopolitical crisis have provided a new momentum for EU-African energy partnerships, the two sides should broaden their focus on several aspects, while considering different starting points and objectives. Firstly, the perspective for additional gas supplies could face major challenges. New African export projects are expected to come online in the late 2020s when EU gas demand is expected to start declining. Therefore, if EU and African countries want to expand gas trade, they should favour flexible solutions in terms of infrastructure and contracts.<sup>44</sup> At the same time, the EU should also cooperate with gas-producing countries to address fugitive methane emissions and reduce flaring and venting activities in line with EU methane regulation and growing international commitments. These issues are particularly of interest for Italy given its ambition to become an energy hub and its energy and political relations with several African countries.

Most importantly, the EU should also establish and enhance credible programmes aimed at addressing Africa's top energy priority: energy access. To do so, the EU should favour the domestic use of African resources, including hydrogen, the expansion of industrial sectors and infrastructure. Furthermore, the EU – despite being a leader in climate finance – should enhance coordination for energy and infrastructure projects in Africa to better leverage and exploit existing funds at the EU and national levels, such as the Global Gateway and national development funds. Furthermore, it may be necessary to reconsider the European approach on financial support to gas projects for local markets in Africa, as demanded by African officials.<sup>45</sup>

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<sup>44</sup> Pier Paolo Raimondi, *Reconciliation of Energy Security and Climate Objective: The Case of Italy*, Rome, IAI, January 2024, <https://www.iai.it/en/node/17983>.

<sup>45</sup> Auguste Breteau, "Europe Should Invest More in African Energy: Ministers", in

CRMs can certainly be a key area for further cooperation. However, the EU engagement in Africa cannot be limited to the upstream sector and needs to extend to midstream and downstream activities. More cooperation has to be achieved in this field in terms of both public and private investments as well as domestic reforms to improve the investment environment. Indeed, the IEA estimates that around 10 per cent of the anticipated 180–200 billion dollars investment in mining up to 2030 will be in Africa (compared to around 4 per cent in China). Conversely, around 70 per cent of the anticipated global 70–160 billion dollars investments in refining and processing will go to China, with Africa receiving a limited share of such investment. On this, the EU should also revise its financial approach and its environmental, social and environment standards, including the investment strategy of its financial institutions, to favour mining and processing activities in Africa.<sup>46</sup>

At the same time, there are also misunderstandings and frustrations around some EU policies on the part of African countries. While EU markets remain attractive for African countries, the EU should embark on more dialogue with its counterparts to fully understand their perspectives and revise some policies and approaches accordingly; otherwise, the risk would be to lose further ground and influence vis-à-vis other external players. This is particularly true at a time when the EU is losing relevance in terms of energy demand and economic growth. Meanwhile, the EU should explain its own reasons for certain decisions and policies, such as the CBAM. Where it is not possible to revise and change policies, the EU should work to support African efforts to adapt through financing technological transfer and capacity building.

On this, Italy should put its competitive advantages at the EU's disposal. Italy has long-lasting and positive political and energy relations with several African countries. For this reason, Italy could engage with

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*Argus Media*, 6 September 2022, <https://www.argusmedia.com/es/news-and-insights/latest-market-news/2368198-europe-should-invest-more-in-african-energy-ministers>.

<sup>46</sup> Max Munchmeyer, *Strategic Security and Critical Raw Materials: The Role of the European Investment Bank*, Rome, IAI, July 2023, <https://www.iai.it/en/node/17351>.

African countries to favour dialogue aimed at shaping common strategies through the establishment of platforms.

Given its expected relevance, it is likely that Africa will attract growing interest from third countries. To some extent, this is already the case. Several countries have expanded their involvement in the continent by enhancing political, economic and security cooperation. The EU should monitor these developments given its deep interests in the continent. At the same time, a degree of cooperation with some third countries that are expanding in Africa should be pursued. The EU cannot itself deliver all of the required investment and projects for Africa's sustainable development, and neither would this be desirable. Therefore, the EU should start working with some countries, for example G7 countries and the Gulf countries,<sup>47</sup> in order to streamline projects and funds. For example, it will be crucial to see how national and European investment decisions will be efficiently and effectively in coordination with the Partnership for Global Infrastructure and Investment (PGII), revitalised by the Italian G7 Presidency in 2024.<sup>48</sup> The Italian decision to start with selected countries and pilot projects has merit. The Mattei Plan pursues an incremental approach and expands projects and initiatives to other countries. It would be important to favour regional integration and cooperation among African countries (also through the African Continental Free Trade Area) in order to deepen market integration and provide better scale economies. This factor is essential to attract investment and to avoid useless duplication.

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<sup>47</sup> Maddalena Procopio and Corrado Čok, "Green Synergies: How the EU, the UAE and Africa Can Cooperate on Energy", in *ECFR Commentaries*, 9 November 2023, <https://ecfr.eu/?p=114487>.

<sup>48</sup> Italian Government, *G7 Partnership for Global Infrastructure and Investment Side Event Co-Chair Statement*, 13 June 2024, <https://www.governo.it/en/node/25993>.

## 2.

## Regional Energy Cooperation in the Gulf: What Role for Europe?

*Mehran Haghirian*

As some of the most significant actors in the global energy markets, the Gulf states – Bahrain, Iran, Iraq, Kuwait, Oman, Qatar, Saudi Arabia and United Arab Emirates (UAE) – are facing a whole set of new opportunities and challenges in the transition away from fossil fuels towards renewable energy. Oil and gas have been viewed as a shared lifeline for these states, and have been significant factors in framing each country's relations with the international community. Within this context, Saudi Arabia, the UAE, and Qatar, are spearheading regional efforts in innovation to smoothen the transition away from fossil fuels as well as embracing renewable energy and new industry technologies. The other Gulf Cooperation Council (GCC) states are also not far behind and have made energy security and sustainable economic development the utmost national priority. While Iran is under economic sanctions and Iraq is heavily engaged in the reconstruction of the war-torn country, they too are also pursuing concrete plans for the further development of their petrochemical industries in tandem to expanding renewable energy.

There have been successful instances of cooperation on energy within the Gulf region, albeit unstructured and sporadic, largely thanks to engagements within the Organization of Petroleum Exporting Countries (OPEC), but also the involvement of international players and the importance of the Gulf's energy reservoirs and waterways to global markets. Even in the midst of the most intense regional conflicts in the past few decades, there has been somewhat of a mutual understanding on the shared benefits of cooperation. But US sanctions on Iran have been the

most important barrier to increasing regional integration and cooperation on energy. Even the Europeans have been forced to cancel proposed agreements and arrangements with Tehran when faced with threats of Washington's secondary sanctions. As such, there have not been any meaningful regional or international cooperation with the inclusion of Iran on energy. Moreover, all countries under consideration have had an inward vision on energy development with limited interest in bilateral or multilateral initiatives, even within the GCC, and the considerations during the current transition phase too have largely lacked regional integration as a topic. But the entire narrative is shifting in the Gulf. Regional players now seek cooperation to lessen regional tensions and the challenges said threats pose to ambitious development agendas.

With the largely positive diplomatic environment in the region since the 2021 Al Ula Summit that ended the intra-GCC rift and the 2023 Beijing Agreement that restored relations between Iran and Saudi Arabia, even closer engagements and partnerships are expected in the energy domain. The reinvigoration of regional dialogue on multilateral cooperation through avenues such as the Baghdad Conference for Cooperation and Partnership, the COP28, and various other reoccurring high-level events within the region, offer the necessary platforms for further discussions on regional energy cooperation.

The United States aside, European and Asian players are heavily invested in the future of energy in the Gulf and their energy needs are more and more deeply intertwined with the Gulf states. The Europeans have moved towards strategic autonomy and reducing energy dependence after Russia's war in Ukraine, which kickstarted a new European impetus for partnerships with traditional oil and gas producers in the Gulf. The conflict also accelerated the push for collaboration on the new energy industries and renewable energy technologies. At the same time, Asian countries such as China, India, Japan and South Korea have heavily invested in energy partnerships with the Gulf states. Thanks to these partnerships as well as the global interest in and demand for energy, the Gulf region, and by extensions the Red Sea and the Arabian Sea, are set to become international hubs for solar, wind, hydrogen, and even nuclear energy in the foreseeable future.

This chapter looks at some practical areas for regional cooperation on energy in the Gulf and identifies ways in which the Europeans could



get involved in supporting initiatives and boosting European interests and influence in the region in the face of rising competition from China and other leading players in Asia.<sup>1</sup>

### *2.1 European energy interests in the Gulf*

While the war in Ukraine temporarily increased European engagement with Gulf states to compensate for the disruptions caused by sanctions on Moscow, the conflict also intensified the urgent need to transition away from fossil fuel dependency towards a diversified portfolio of renewable energy sources. In line with this view, Nikolay Kozhanov, Associate Professor of Gulf Studies, writes that the conflict has served as “both a gift and a curse for oil producers” in the Gulf.<sup>2</sup> Since February 2022, European capitals have raced to procure energy from the GCC states. Qatari, for example, has a goal to use expansions in the North Field as well as new LNG importing terminals in Europe, to send more gas to the continent in the future, pending negotiations.<sup>3</sup> The UAE, in another example, has announced plans to double its LNG export capacity through its Fujairah plant.<sup>4</sup>

But if Europe is to become an even larger consumer of Gulf energy, discussions over energy security must also encompass plans to help the region manage its transition to green energy, creating economies less dependent on

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<sup>1</sup>The ideas presented in this chapter largely emanate from a joint workshop held in Rome in November 2023 and an edited report published in May 2024 by the Bourse & Bazaar Foundation (B&BF) and the Istituto Affari Internazionali (IAI), focused on *Avenues for Regional Energy Cooperation in the Gulf*. The workshop and this volume were part of the same research project co-financed by the Italian Ministry of Foreign Affairs and International Cooperation and the Rockefeller Brother Fund.

<sup>2</sup>Nikolay Kozhanov, “Accelerating the Gulf’s Energy Transition in the Wake of Russia’s War”, in Mehran Haghirián and Maria Luisa Fantappiè (eds), *Avenues for Regional Energy Cooperation in the Gulf*, Bourse & Bazaar Foundation and IAI, May 2024, p. 16-21 at p. 16, <https://www.iai.it/en/node/18471>.

<sup>3</sup>Justin Alexander, “The Ukraine Crisis is Vindicating Qatar’s Bold Gas Expansion Strategy”, in *AGSIW Blog*, 24 February 2022, <https://wp.me/p9W40X-9Zj>.

<sup>4</sup>Anthony Di Paola and Verity Ratcliffe, “UAE to More than Double LNG Export Capacity with Fujairah Plant”, in *Bloomberg*, 17 May 2022, <https://www.bloomberg.com/news/articles/2022-05-17/uae-to-more-than-double-lng-export-capacity-with-fujairah-plant>.

the export of fossil fuels. The green transition is already on the EU's agenda for the region – in his 2022 remarks, Borrell noted that the region's "transition towards a green economy will be one of the most important aspects for us, for them, for the humankind".<sup>5</sup> "A partnership for a green transition and sustainable energy security" is a key element of the Communication and in line with the EU's Green Deal agenda as well. For the EU, interest in securing alternative energy sources continues to grow.

Boosting energy security in the Gulf region is an immediate area that will serve Europe's strategic security needs. The Joint Communication on a Strategic Partnership with the Gulf argues that strengthening partnerships with the region are instrumental in the implementation of European energy strategies such as REPowerEU and the complementing EU External Energy Strategy.<sup>6</sup> This should proceed by increasing LNG supplies, coordinating measures to stabilise oil markets, and, at the same time, getting involved in the region's long-term renewable energy strategies in the face of significant competition from China, as well as other Asian players.

"Traditionally, European concerns about Gulf domestic policies limited the interaction between EU countries and GCC states in the energy field, but many of these concerns have been pushed aside", notes Kozhanov.<sup>7</sup> The European Union is now more willing to assist the GCC countries in their transition to renewable energy, emphasising its expectation that the Gulf will help the EU reduce its dependence on Russian oil and gas, thereby mitigating the impact of geopolitical tensions on oil prices.

Moreover, climate change is as important in the Gulf region as anywhere, and there is an awakened regional sense on the need for cooperation in tackling shared environmental challenges, particularly when considering the energy domain.

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<sup>5</sup> European External Action Service (EEAS), *EU-GCC Joint Council: Remarks by High Representative Josep Borrell upon Arrival*, 21 February 2022, [https://www.eeas.europa.eu/node/111203\\_en](https://www.eeas.europa.eu/node/111203_en).

<sup>6</sup> European Commission and EEAS, *A Strategic Partnership with the Gulf* (JOIN/2022/13), 18 May 2022, <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=celex:52022JC0013>.

<sup>7</sup> Nikolay Kozhanov, "Accelerating the Gulf's Energy Transition in the Wake of Russia's War", cit., p. 20.

Europe's transition towards renewable energy requires efforts to support the same transition among the energy exporters of the Gulf. European demand for hydrogen, and other types of green energy is expected to rise, and this demand can be met in part by energy producers in the Gulf if the necessary investments are made. As the Communication mentions, the region can "play a role as a producer and supplier of decarbonised energy, including renewable hydrogen and electricity".<sup>8</sup> For example, green energy, and particularly hydrogen, will be what most if not all of these countries will be forced to transition their infrastructure towards and building a sustainable economic trade relationship will provide the necessary guarantees to entice oil and gas exporting countries.

"Between 2023 and 2028, the IEA predicts that the Gulf region is expected to increase its renewable power generation capacity by over 40 GW", according to Nadim Abillama, Middle East and North Africa Programme Officer at the International Energy Agency, which is almost half of Saudi Arabia's current power generation and exceeds the total power currently generated by the UAE.<sup>9</sup> This expansion is largely driven by utility-scale solar PV projects. Moreover, hydrogen is expected to constitute around 13 per cent of the additional renewable power capacity, supported by government-backed incentives to promote hydrogen trade.<sup>10</sup> The region's high solar irradiation, abundant land, and port infrastructure also facilitate the growth in PV projects and hydrogen. While the region has significantly advanced technologically and is producing some high-grade equipment and machinery, there continues to be a need and much room for collaboration with external players. By leveraging the much-needed expertise and technology, the Europeans are poised to strengthen their influence and capacity in the region.

As suggested by Robin Mills, Chief Executive Officer of Qamar Energy, cooperation should involve aligning standards and regulations; sharing

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<sup>8</sup> European Commission and EEAS, *A Strategic Partnership with the Gulf*, cit., p. 6.

<sup>9</sup> Nadim Abillama, "Rising Electricity Demand Requires New Thinking on Gulf Grids", in Mehran Haghiriian and Maria Luisa Fantappiè (eds), *Avenues for Regional Energy Cooperation in the Gulf*, Bourse & Bazaar Foundation and IAI, May 2024, p. 30-33 at p. 31, <https://www.iai.it/en/node/18471>.

<sup>10</sup> Ibid.

technological learnings and best practices; conducting joint studies on regional carbon dioxide storage capacity or satellite monitoring of methane leakage; and even shared infrastructure.<sup>11</sup> Collaborative investments, both within the Gulf and in Europe could focus on producing low-carbon hydrogen and sustainable fuels. This partnership could extend to policy and diplomatic efforts in areas like carbon caps, prices or taxes, international carbon trading under the Paris Agreement's Article 6.4, managing carbon border tariffs, and certifying low-carbon hydrogen.<sup>12</sup>

There is also room for trilateral and multi-party cooperation in Iraq. Mills points out that QatarEnergy recently entered a project in southern Iraq led by TotalEnergies for development of oil, gas, water injection and solar power.<sup>13</sup> This project exemplifies the kind of integrated energy cooperation that can bridge traditional fossil fuels and renewable energy sources through a multilateral effort and with European involvement.

But energy security is not only about securing energy resources from the region, rather, ensuring freedom of navigation and the uninterrupted flow of oil and gas are equally as important. While Qatari LNG plants have been shielded from military attacks assumingly because of cordial ties with Tehran, the UAE's Fujairah port and Saudi oil facilities in Abqaiq and Khurais suffered greatly in the tension-filled summer of 2019. The current regional environment in the Gulf has largely decreased military tensions between Iran and the GCC states, despite the ongoing threats to international vessels by Houthi attacks from Yemen or the rising tensions between Iran and Israel that has broadened in scope and geographic area.

Aside from forging bilateral agreements, the new regional and global developments call for a more structured energy security cooperation between the Gulf states, inclusive of Iran and Iraq, as well as with players on the broader Eurasian context. The EU and member states have in the

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<sup>11</sup> Robin Mills, "Climate Policy and Cross-Border Hydrocarbon Development in the Gulf", in Mehran Haghirian and Maria Luisa Fantappiè (eds), *Avenues for Regional Energy Cooperation in the Gulf*, Bourse & Bazaar Foundation and IAI, May 2024, p. 26-29 at p. 29, <https://www.iai.it/en/node/18471>.

<sup>12</sup> Ibid.

<sup>13</sup> Ibid., p. 26.

past decade engaged in a number of partnerships in the region on green transition – but these partnerships have not sought to tackle the root causes of the problem in an inclusive regional context. The EU Special Representative for the Gulf Region is in charge of monitoring and reporting on potential areas of collaboration through initiatives like the Global Gateway, but more importantly, it has a mandate to expand partnerships and cooperation between the EU and individual member states with all countries in the Gulf and in every major domain, including energy.

The regional countries are already exploring avenues for cooperation on oil, gas, hydrogen, power generation and electricity, solar and wind, water, minerals, as well as nuclear energy.

## 2.2 Oil

There is increasing pressure from international buyers for Gulf states to ensure their oil exports are more “environmentally friendly”, taking into account the GCC commitments made at COP27 and COP28, as well as under the Paris Agreement and the goal of net-zero emissions.<sup>14</sup> At the same time, “the Gulf states need to ensure a stable and long-term demand for Gulf hydrocarbons”, according to Kozhanov, which necessitates greater investment abroad and efforts to attract European and Asian investments.<sup>15</sup>

Kozhanov highlights that the circular carbon economy, endorsed by nearly all states in the region, “does not reject the further development of oil and petrochemical industries [...] but implies the introduction of obligatory compensation measures for emissions through the active use of carbon capture technologies (CCUS)”.<sup>16</sup> The Gulf states view the transition to new energy industries as “a complement and addition to their hydrocarbon-based economies”.<sup>17</sup> This perspective sees diversification not as a replacement but as an enhancement of their current economic

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<sup>14</sup> Nikolay Kozhanov, “Accelerating the Gulf’s Energy Transition in the Wake of Russia’s War”, cit., p. 17.

<sup>15</sup> Ibid., p. 19.

<sup>16</sup> Ibid., p. 18-19.

<sup>17</sup> Ibid., p. 20.

base, recognising that oil will continue to be essential for products ranging from medicines to cosmetics, clothing, and technology.

In tandem, Mills also notes that the petroleum industry has the “potential to foster cooperation on decarbonisation paths”, which includes efforts such as ending flaring and methane leakage, improving energy efficiency, electrifying operations, and integrating renewable and nuclear power.<sup>18</sup> Additionally, this includes “implementing carbon capture and storage, piloting carbon dioxide removal technologies, producing sustainable aviation and maritime fuels, and developing hydrogen and its derivatives”.<sup>19</sup> With much interest in each of these domains, European companies and countries need to redouble efforts to establish or boost partnerships in the region.

While investments in national oil and gas projects is paramount, the GCC states are investing hefty sums in energy projects abroad because of the high investment returns and adding a layer of energy security for the long-term. For example, Kuwait Foreign Petroleum Exploration has also been seeking oil and gas explorations in Malaysia, Indonesia, Pakistan and Australia.<sup>20</sup> But because of underinvestment in energy infrastructure due to sanctions and financial incapability, Iran and Iraq have significant untapped energy supply and outdated technology and machinery. This disconnect with the GCC states provides various opportunities for regional and international cooperation. Exploring multiparty investments between some GCC states, Iran, and EU players in Iraq’s petrochemical industry is feasible as well. Europeans can get involved in multi-party projects with GCC partners inside Iran and Iraq by creating and providing funds and mechanisms for such projects.

There are many pipelines in the region that are either inactive, never activated, or have been damaged. Reinvigorating pipeline diplomacy, at least in the immediate neighbourhood should be explored. Abi-Aad, Chief Operating Officer at Petroleb, emphasises the strategic importance

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<sup>18</sup> Robin Mills, “Climate Policy and Cross-Border Hydrocarbon Development in the Gulf”, cit., p. 28.

<sup>19</sup> Ibid., p. 28-29.

<sup>20</sup> Rania El Gamal, “Kuwait’s KUFPEC Eyes Acquisitions as It Boosts Oil, Gas Output – CEO”, in Reuters, 20 June 2019, <https://www.reuters.com/article/idUSL8N23K574>.

of petroleum pipelines, which are built with the goals of connecting to broader Eurasian energy markets, diversifying oil export routes, and reducing vulnerability.<sup>21</sup> Abi-Aad also points out that, despite ongoing challenges, international pipelines are crucial for the region and can serve as efficient and secure means of energy trade if operated correctly. He stresses that “the issue of transit fees must be clearly resolved”, as these fees, whether returned in cash or commodities, could significantly impact the economic viability of a pipeline project.<sup>22</sup> There is also a need for regulatory frameworks and standards which European expertise and know-how can facilitate regional discussions.

Mills notes that the region’s oil exporters benefit from extensive oil storage and bunkering facilities available in the UAE and Oman, which play a crucial role in the logistics and stability of oil exports and act as an area for closer regional cooperation.<sup>23</sup> There could be more direct discussions on how to expand such facilities or establish new ones through multilateral efforts.

Europe can also play a role in seeking to create plans for cross-border development of energy infrastructures as well as on shared fields. Iran shares 27 joint oil and gas fields with its GCC neighbours, and there are dozens of other joint fields between different GCC states as well as with Iraq.<sup>24</sup> For example, Iran and Oman are exploring cooperation in the oil fields on Hengam island near the Strait of Hormuz. In 2022, as another example, Saudi Arabia and Kuwait invited Iran to hold negotiations to determine the eastern limit of a joint offshore area.<sup>25</sup> Mills suggests that an agreement on the Dorra gas field, pos-

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<sup>21</sup> Third countries refer to the country or countries geographically positioned between the exporting and importing countries. Naji Abi-Aad, “Pipelines and the Challenges of Energy Integration in the Middle East”, in Mehran Haghiriian and Maria Luisa Fantappiè (eds), *Avenues for Regional Energy Cooperation in the Gulf*, Bourse & Bazaar Foundation and IAI, May 2024, p. 22-25 at p. 22, <https://www.iai.it/en/node/18471>.

<sup>22</sup> *Ibid.*, p. 24.

<sup>23</sup> Robin Mills, “Climate Policy and Cross-Border Hydrocarbon Development in the Gulf”, *cit.*, p. 26.

<sup>24</sup> Rahim Silavi, “Integrated development of common fields, “when”; Opportunities and challenges” (in Persian), in *Shana*, 1 June 2022, <https://www.shana.ir/news/457571>.

<sup>25</sup> Maher Chmaytelli, “Kuwait, Saudi Arabia Invite Iran to Hold Talks on Gas-Rich Off-

sibly through a joint development zone without concession of sovereignty, could be a viable solution. Similar agreements have allowed Saudi Arabia to share oil from the Abu Safa field with Bahrain and enabled Qatar and the UAE to divide resources from the offshore Bunduq oil field. A possible area for territorial confrontation could easily be turned into a multilateral cooperation.

The Europeans can engage parties through an EU-mediated approach by using international law to help in finding mutually acceptable solutions developing shared fields. Particularly, Europeans could assist the regional countries in “defining their boundaries using international law, proposing win-win multilateral projects, and investing in the development of the fields”.<sup>26</sup> More importantly, European firms could get involved in scoping the contours of a framework for unitisation in joint fields. Unitisation is among the most “cost-effective solution for extraction, processing, and export” in developing joint fields.

### 2.3 Gas

The region’s energy resources are not distributed equally, with Kuwait, the UAE, and Iraq now being net gas importers.<sup>27</sup> This disparity fosters opportunities for closer regional cooperation. Kuwait mainly relies on gas imports from Africa, Europe, and the Americas, while the UAE imports from Qatar through the Dolphin pipeline and Iraq imports from Iran. Qatar is one of the world’s biggest LNG exporters and “has a major expansion programme to be completed during 2026-27”.<sup>28</sup> While Oman

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shore Zone-SPA”, in *Reuters*, 13 April 2022, <https://www.reuters.com/business/energy/kuwait-saudi-arabia-invite-iran-hold-talks-gas-rich-offshore-zone-spa-2022-04-13>.

<sup>26</sup> Matteo Moretti and Mehran Haghirián, “Can ‘Unitisation’ of Oil and Gas Fields Power Diplomacy in the Persian Gulf?”, in *B&BF Articles*, 30 July 2022, <https://www.bourseandbazaar.com/articles/2022/7/30/can-unitization-of-oil-and-gas-fields-power-diplomacy-in-the-persian-gulf>.

<sup>27</sup> Osamah Al-Sayegh, “The Case for Cooperation on the Energy Transition in the Gulf”, in Mehran Haghirián and Maria Luisa Fantappiè (eds), *Avenues for Regional Energy Cooperation in the Gulf*, Bourse & Bazaar Foundation and IAI, May 2024, p. 10-15 at p. 11, <https://www.iai.it/en/node/18471>.

<sup>28</sup> Robin Mills, “Climate Policy and Cross-Border Hydrocarbon Development in the Gulf”, cit., p. 26.



and the UAE are smaller LNG exporters (with the UAE also expanding), Iran plays a role as a supplier of gas by pipeline to Turkey and Iraq.

The demand for electricity – and consequently for natural gas – peaks in the summer for most countries in the region, causing gas sales to fall in the winter. To address these seasonal challenges, regional countries could establish storage facilities either at the upstream producing end or at the downstream consuming side.<sup>29</sup> Mills argues that “more intra-regional gas trade would enable reducing the use of oil in the power sector”. Qatar, Iran, the Kurdistan Region of Iraq would be natural suppliers of gas by pipeline to their neighbours. Cross-border investments in gas-utilising sectors like petrochemicals, and multi-country gas networks, could create resilient structures against politically or commercially motivated supply disruptions.<sup>30</sup> The advancement of such initiatives could also entail European involvement in both infrastructure development, and interregional connectivity.

“The psychological desire among oil-producing countries for self-sufficiency” often leads to a preference for burning more liquid fuels rather than importing gas, according to Abi-Aad, despite the higher costs and environmental damage associated with liquid fuels.<sup>31</sup> This is also linked to regional tensions and powerplays. For example, a “plan to supply Qatari gas to Kuwait was entirely blocked by Saudi Arabia”, which wanted to maintain its influence over smaller GCC states and prevent them from establishing independent energy links.<sup>32</sup> With the new cooperative environment, one can imagine the restart of talks on these cross-border developments.

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<sup>29</sup> Naji Abi-Aad, “Pipelines and the Challenges of Energy Integration in the Middle East”, cit., p. 25.

<sup>30</sup> Robin Mills, “Climate Policy and Cross-Border Hydrocarbon Development in the Gulf”, cit., p. 28.

<sup>31</sup> Naji Abi-Aad, “Pipelines and the Challenges of Energy Integration in the Middle East”, cit., p. 25.

<sup>32</sup> Robin Mills, “Climate Policy and Cross-Border Hydrocarbon Development in the Gulf”, cit., p. 27.

## 2.4 Hydrogen

A joint gas pipeline could also facilitate hydrogen transmission, aligning with the net-zero agenda. Specifically, “having a joint pipeline network capable of carrying hydrogen products could [...] pave the way for the region to become a world hub in the production and export of carbon-neutral [...] hydrogen”.<sup>33</sup> Al-Saidi highlights the strong interest shown by the Gulf and European regions in cooperating on the energy transition, even inclusive of North Africa through a tripartite cooperation between the Gulf, the Red Sea, and the Mediterranean. Cooperation between Egypt and the Gulf states will benefit Europe, which is promoting increased grid connections with Africa and the development of green hydrogen in Egypt.<sup>34</sup>

There is hope to move away from using natural gas to renewables such as solar and wind for hydrogen production, further supporting the region’s energy transition goals. But as Natalie Koch points out, creating hydrogen energy requires vast amounts of energy, and for it to be “green”, this energy must come from renewables. Regional players must be mindful of the water requirements of any energy related initiative and also aim to find regional approaches to mitigating challenges.<sup>35</sup> As a relatively new energy industry the Gulf will be developing various forms of hydrogen energy with an import market in Europe in mind.

The UAE has a large blue hydrogen project, while Oman has announced a series of initiatives on green hydrogen. Saudi Arabia also has the largest green hydrogen project in construction in Neom. A sustainable economic trade relationship will entail a vigorous and active market in Europe

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<sup>33</sup> Osamah Al-Sayegh, “The Case for Cooperation on the Energy Transition in the Gulf”, cit., p. 11.

<sup>34</sup> Mohammad Al-Saidi, “Fostering a New Energy System for the Gulf, the Red Sea, and the Mediterranean”, in Mehran Haghirian and Maria Luisa Fantappiè (eds), *Avenues for Regional Energy Cooperation in the Gulf*, Bourse & Bazaar Foundation and IAI, May 2024, p. 40-45 at p. 41, <https://www.iai.it/en/node/18471>.

<sup>35</sup> Natalie Koch, “Solar Power’s Water Problem in the Gulf”, in Mehran Haghirian and Maria Luisa Fantappiè (eds), *Avenues for Regional Energy Cooperation in the Gulf*, Bourse & Bazaar Foundation and IAI, May 2024, p. 34-39 at p. 37, <https://www.iai.it/en/node/18471>.

for the import of green energy resources from the Gulf region. This will require Europeans to build the necessary infrastructure for hydrogen inside Europe in addition to providing the exporting capabilities, technology and knowhow to these countries for the implementation of such projects. Key areas include “an integrated gas and hydrogen infrastructure, hydrogen storage facilities and port infrastructure”.<sup>36</sup> The EU has already begun an initiative on a Mediterranean Green Hydrogen Partnership. Europeans could replicate that initiative in the Gulf to not only advance energy interests, but also contribute to regional cooperation by establishing a platform for partnerships in hydrogen. From the European side, Germany aims to capitalise on the possibility of GCC countries moving towards hydrogen. The German interest in promoting hydrogen is the most relevant in Europe, mainly to keep their heavy industry sector going, corresponding to the need in job creation in both regions. The EU should favour the use of hydrogen domestically in the Gulf for producing decarbonised products (such as green steel). This would also create more jobs and overcome massive challenges to the international hydrogen trade.

### *2.5 Power generation and electricity*

Population growth and specific uses, such as cooling and water desalination driven also by climate change, are major drivers of electricity demand in the region.<sup>37</sup> There is also a region-wide need for innovative economic models to address system flexibility due to changes in peak demand between seasons and between day and night. Climate change affects not only demand patterns, but also the resilience of the power system itself. Higher temperatures, droughts, higher sea levels, and flash floods can significantly impact operations on the supply side and reduce output. This vulnerability extends to conventional power generation (oil and gas) as well as nuclear and solar PV units. Thus, a clear area for regional cooperation also lies on combatting shared environmental challenges through regional mechanism and initiatives.

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<sup>36</sup> European Commission and EEAS, *A Strategic Partnership with the Gulf*, cit., p. 7.

<sup>37</sup> Nadim Abillama, “Rising Electricity Demand Requires New Thinking on Gulf Grids”, cit., p. 30.

The Gulf Cooperation Council Interconnection Authority (GCCIA) envisions an interconnected power grid extending beyond the Arabian Peninsula. Leveraging the region's abundant solar and wind resources, Al-Sayegh notes that the GCCIA will "give domestic power grids more reliability and stability in the face of increasing challenges, such as unexpected electric load rise, as well as blackouts due to natural disasters or equipment failures".<sup>38</sup> The GCCIA's vision includes potential linkages with Iraq, Iran, Turkey, and even the European Union, which could eventually help meet a small, yet noteworthy, portion of Europe's future energy demands.

Al-Saidi highlights the long-standing industrial legacy of Asian companies, such as Japan's Hitachi Energy, in the Gulf Cooperation Council. These companies have been involved in building desalination plants and energy projects, such as the Saudi-Egypt grid connection and are clear competition to European companies aiming for a share in the region's energy infrastructure development.<sup>39</sup> Al-Saidi also notes that the electrical connection between Egypt and Saudi Arabia will start trial operations in 2024, linking two major economies in the region and two different continents. Another significant project is the ongoing Euro-Africa interconnector, which will join Egypt to Cyprus and Greece. Alongside the existing connections between Morocco and Spain, this project will further connect North Africa and Europe.

Efficiency initiatives across the region also aim to enhance the reliability and stability of the power supply, mitigate the impact of seasonal demand fluctuations, and address the challenges posed by climate change. These efforts are crucial for ensuring a sustainable and resilient power generation and electricity system in the Gulf. Saudi Arabia has accelerated the roll-out of smart metres and partially reviewed its electricity tariffs to promote more rational consumption patterns.<sup>40</sup> In

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<sup>38</sup> Osamah Al-Sayegh, "The Case for Cooperation on the Energy Transition in the Gulf", *cit.*, p. 11.

<sup>39</sup> Mohammad Al-Saidi, "Fostering a New Energy System for the Gulf, the Red Sea, and the Mediterranean", *cit.*, p. 42.

<sup>40</sup> Nadim Abillama, "Rising Electricity Demand Requires New Thinking on Gulf Grids", *cit.*, p. 30.

another instance, Dubai has over two million smart metres installed, and Oman aims to install 1.2 million smart metres by 2025 under its national smart metre programme overseen by the Authority of Public Services Regulation.<sup>41</sup> Other regional countries could benefit from these experiences and the Europeans can look into bringing the next generation of technology and equipment into the region, and help with managing and operating them.

## *2.6 Solar and wind*

The Gulf region, along with the southern regions of Iran and the entire Arabian Peninsula, are some of the best geographic locations for solar and wind energy worldwide. These areas receive “more than 2,100 kilowatt-hours (kWh)” of solar energy annually and experience wind speeds that can reach about 10 metres per second (m/s).<sup>42</sup> Koch notes that the Arabian Desert receives around 3,400 hours of sunshine per year, significantly more than Germany’s 1,600 hours or Spain’s 2,900 hours.<sup>43</sup> Despite the immense potential for solar power in desert environments, however, existing panels face underutilisation due to challenges in maintenance and cleanliness. Arid landscapes pose various infrastructure challenges, such as high temperatures that can damage solar arrays and remoteness from established energy transmission lines. Moreover, water scarcity, a crucial issue in the region, limits the ambitious energy system overhauls and decarbonisation promises made by GCC governments.

European firms have made important investments in solar and wind power projects. But the EU and its member states should find ways to incentivise European companies to take a regional view to the development of renewable energy infrastructures in the Gulf. Investing in solar, wind, biofuel, and other forms green and renewable energy in the region is certainly lucrative, and each country, particularly within the GCC has been expanding such projects individually. Designing inter-regional

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<sup>41</sup> Ibid., p. 30-31.

<sup>42</sup> Osamah Al-Sayegh, “The Case for Cooperation on the Energy Transition in the Gulf”, cit., p. 10.

<sup>43</sup> Natalie Koch, “Solar Power’s Water Problem in the Gulf”, cit., p. 34.

projects that cross borders will carry large financial profits and would also contribute to long-term economic stability and sustainability in the region. Europeans could support developing the designs for cross-border renewable projects that include Iran, Iraq, and the GCC states, including in border areas to easily divide the outputs. Moreover, creating partnerships between European and GCC companies on green and renewable projects inside Iran's vast untapped lands should be considered, particularly if and when sanctions are removed. The Global Europe instrument foresees European involvement in such projects.

But while solar power discussions often feature pristine PV arrays, such clean conditions are rare in the Arabian Desert, where dust and sand quickly cover the panels and mirrors of both photovoltaic (PV) systems and concentrated solar power (CSP) systems. Thus, Koch criticises the notion that solar energy produced in the Arabian Peninsula's desert parks is truly green, arguing that it is "incredibly wasteful".<sup>44</sup> The reliance on water for cleaning solar panels in such arid regions undermines the sustainability of these projects. Koch also warns that solar projects in deserts, plagued by dust problems, overpromise both in the present, due to insufficient production capacity, and in the future, because the region's water supplies are inadequate to meet the demands of local renewable energy ambitions.<sup>45</sup>

Companies like Arizona's First Solar and Luxembourg's SolarCleano have promoted waterless cleaning systems to tackle the dust problem in desert solar installations.<sup>46</sup> Additionally, Gulf-based solar technology companies are aware of this issue and have developed their own solutions. For example, Saudi Arabia's NOMADD has created the "NO Water Mechanical Automated Dusting Device" to clean solar panels without using water.<sup>47</sup> These robotic systems are designed to maintain solar panel efficiency in dusty environments, but their rollout on a large scale is expensive and difficult to accomplish in a short time period. There is

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<sup>44</sup> Ibid., p. 35.

<sup>45</sup> Ibid., p. 36.

<sup>46</sup> Ibid., p. 35.

<sup>47</sup> Ibid.

room for joint initiatives with leading European companies to find efficient ways to produce and implement projects, in the face of less expensive Chinese and Asian competitors.

## 2.7 Water

Water scarcity has emerged as a critical regional issue with profound consequences. The Gulf region faces significant challenges due to dwindling water resources exacerbated by climate change and human activities. The 2020–21 period marked the region's second-driest in forty years, leading to crop failures and severe groundwater depletion.<sup>48</sup> Even countries like Iran, initially better off, are now experiencing water crises, while rivers like the Tigris and Euphrates in Iraq are at risk of drying up by 2040.<sup>49</sup> To offset depleting water resources, all regional states have heavily relied on desalination plants to meet their needs. However, older methods like thermal desalination pose environmental risks, contributing to carbon footprints and increasing water salinity in the Gulf.<sup>50</sup> This reliance on desalination also strains energy resources, affecting both environmental sustainability and economic stability.

Aside from the continued need for water to manufacture and operate solar panels, water is also crucial in extracting diverse minerals needed for batteries, such as lithium, cobalt, tellurium, and gallium.<sup>51</sup> Water is also essential in the manufacturing process itself and is integral to all modern forms of electricity generation, including fossil fuels, nuclear

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<sup>48</sup> Claire Parker and Kasha Patel, "Sandstorm Wave Sweeps Middle East, Sending Thousands to Hospitals", in *The Washington Post*, 26 May 2022, <https://www.washingtonpost.com/world/2022/05/26/sand-storms-middle-east-climate-change>.

<sup>49</sup> Maya Gebeily, "As Iran Faces 'Water Bankruptcy', Drought Exposes Past Problems, Future Threats", in *Reuters*, 28 July 2021, <https://www.reuters.com/article/idUKL8N2P24NL>.

<sup>50</sup> Mehran Haghirián, "Addressing Shared Environmental Challenges in the Gulf with European Support," in Mehran Haghirián and Aisha Al-Sarihi (eds), *Pathways for Regional Environmental Cooperation in the Gulf*, Bourse & Bazaar Foundation, November 2023, p. 101-116, [https://static1.squarespace.com/static/54db7b69e4b00a5e4b11038c/t/656471023d3649721c145b37/1701081351416/B&BF\\_Haghirián\\_AlSarihi\\_Environmental\\_Cooperation\\_Gulf.pdf](https://static1.squarespace.com/static/54db7b69e4b00a5e4b11038c/t/656471023d3649721c145b37/1701081351416/B&BF_Haghirián_AlSarihi_Environmental_Cooperation_Gulf.pdf).

<sup>51</sup> Natalie Koch, "Solar Power's Water Problem in the Gulf", cit., p. 36.

power, and renewables. Al-Sayegh proposes establishing a regional water interconnection network, based on a GCC study from 2000.<sup>52</sup> To mitigate water scarcity challenges in some areas, this network would supply fresh water to all GCC states from desalination plants jointly built on the Gulf shores. In addition to desalination, the region should also focus on water treatment, resource management, and transmission across the Gulf. The EU can help in bringing the countries together in close cooperation with other international organisations such as the Regional Organization for the Protection of the Marine Environment (ROPME), the only platform to date that includes all eight littoral states as members.

## 2.8 Minerals

Iran has recently unveiled a significant lithium deposit, estimated at 8.5 million metric tonnes, positioning it as the world's fifth-largest reserve holder.<sup>53</sup> Moreover, Iran has also reported discoveries of other crucial minerals including manganese, nickel and cobalt.<sup>54</sup> At the same time, Saudi Arabia has made headlines by its estimates for untapped mineral reserves which have nearly doubled from 1.3 trillion dollars in a 2016 forecast to 2.5 trillion dollars in 2024, including copper, phosphate, iron, nickel, and other rare earth elements.<sup>55</sup> There is a critical need for these raw materials and minerals to realise ambitious renewable energy plans. Minerals such as lithium, iron, copper, cobalt, and nickel, discovered around the region, are "essential components of renewable energy technologies and energy storage systems".<sup>56</sup> Al-Sayegh suggests

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<sup>52</sup> Osamah Al-Sayegh, "The Case for Cooperation on the Energy Transition in the Gulf", cit., p. 15.

<sup>53</sup> "Iran 'Reviewing' Foreign Technology after Discovery of Major Lithium Deposits", in *Amwaj Media*, 9 March 2023, <https://amwaj.media/media-monitor/iran-reviewing-foreign-technology-after-discovery-of-major-lithium-deposits>.

<sup>54</sup> Mahnaz Abdi, "Iran's Mining Sector Being Developed, Boosting Export", in *Tehran Times*, 21 February 2024, <https://www.tehrantimes.com/news/495207>.

<sup>55</sup> Natasha Turak, "Saudi Arabia Nearly Doubles Estimate for the Value of Its Mineral Resources", in *CNBC*, 10 January 2024, <https://cnb.cx/4963UhZ>.

<sup>56</sup> Osamah Al-Sayegh, "The Case for Cooperation on the Energy Transition in the Gulf", cit., p. 12.



that the development of a regional value chain is crucial. He proposes that regional countries “pool resources, share costs, and achieve economies of scale” to gain “broader access to markets and assert their role as key players in the energy transition agenda”.<sup>57</sup> This could be achieved through joint ventures in infrastructure development for the management, extraction, processing, and export logistics of these vital minerals.

## 2.9 Nuclear energy

Countries such as the UAE, Iran and Saudi Arabia are either investing or exploring strategies in nuclear energy to decarbonise. There are genuine proliferation risks associated with the further development of civilian nuclear programmes, and the risk of regional escalation looms given concerns that the proposed programmes are not strictly civilian in nature. The Communication recognises the importance of “enhancing the collaboration on nuclear safety and nuclear emergency preparedness and response”.<sup>58</sup> Such collaboration could entail technical support on “nuclear safety culture or accident management”, as well as “nuclear emergency preparedness and response”.

While the Communication focuses on the nuclear programs in the GCC – in the UAE and Saudi Arabia – the EU needs to merge these initiatives with those it has with Iran through the Joint Comprehensive Plan of Action (JCPOA) and other bilateral and multilateral agreements. Merging the technical partnerships, as much as is applicable, would serve as another platform for regional cooperation and a further boon to nuclear non-proliferation. In addition, using the Euratom Treaty as a model and with Euratom itself possibly entering into a cooperation agreement, Europe can help foster a regional commitment to nuclear safety and security and create a collaborative approach to the development of the region’s nuclear industry in partnership with European nuclear contractors; particularly when considering the competition from Asian players.

Iran’s Bushehr plant and the UAE’s Barakah plant are built on the shores of the Gulf, raising serious environmental and catastrophic

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<sup>57</sup> Ibid., p. 13.

<sup>58</sup> European Commission and EEAS, *A Strategic Partnership with the Gulf*, cit., p. 9.

human risks. The rising water temperatures in the Gulf are also a sign of concern as the cooling mechanism for nuclear power plants are jeopardised and cut output.<sup>59</sup> Also, as Iran, the UAE, and Saudi Arabia aim to use their nuclear energy for desalination purposes, that too “adds to atmospheric pollution and global warming in the region”.<sup>60</sup> A joint initiative between the EU, Iran, Saudi Arabia, and the UAE for research in finding mitigating strategies to reduce atmospheric pollution in the nuclear domain should also be considered.

But aside from nuclear safety and technical support, Europe can play an important role in guiding the development of civilian nuclear power. European actors can share know-how on how to connect the region’s nuclear programmes to boost outputs in the fields of electricity generation, water desalination, and medicine. With billions of dollars already invested, Iran, the UAE and Saudi Arabia are intent on maximising the civilian use of nuclear energy. With European expertise and decades-long experience in using nuclear medicine, it would be apt to establish a joint EU-GCC-Iran research and development group for knowledge-sharing and technical transfers of technology amongst states.

## *2.10 Conclusion*

Advocating for increased investments in renewable energy on a mass scale is the goal, but this must be accompanied by the promotion of industrial value chains for job creation and economic interdependence in the transition process. There is clearly a need for sustainable value chains to retain revenues within countries.

Dependency will remain a key limiting factor in expanding regional energy cooperation and integration. Nevertheless, there is much room for effectuating regional cooperation on energy beyond the current

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<sup>59</sup> Patrick Sykes, “Iran’s Nuclear Program Hits New Snag on Climate Challenge”, in Bloomberg, 31 August 2022, <https://www.bloomberg.com/news/articles/2022-08-31/iran-s-nuclear-program-hits-new-snap-as-climate-challenge-grows>.

<sup>60</sup> Mahima Shanker, “Possible Solutions to the Middle East’s Water Woes”, in *Maithri Blog*, 1 December 2021, <https://www.maithriaqua.com/post/middle-east-water-woes-possible-solutions>.

minimal levels. The argument that economic interdependence leads to more peace and stability stands valid. This is not to say that the economic interdependence is risk averse, and there is certainly a chance that it could lead to conflict, as seen with Russia's war on Ukraine. No country is eager to put its energy security in the hands of a neighbour, even if brothers in terms of the GCC family. But this outlook can change and with a clear and balanced strategy, fallouts could also be mitigated.

Chinese, Russians, and other Asian countries might have the technology and knowhow for many of such initiatives, however, the reputation of European technology in the region is second to none and all states, and businesses, in the region generally prefer to work with Europe, if the costs and profits are competitive with those coming from the East. European actors could leverage this fact to drive forward green energy policies in infrastructure development, investments, and multilateral cooperation in the region. While some Gulf states are slow in moving towards renewable energy, they are all forced to set in motion long-term plans for the transition. Europeans should be there to entice these countries to make the transition more quickly, and with European support.



## 3.

## Regional Reconfigurations and Geopolitical Shifts in the Sahel and Mediterranean

*Darlington Tshuma*

The interconnectedness between the Sahel and the Mediterranean represents a complex geopolitical sphere in which intersecting factors, including historical and cultural legacies, security and migration dynamics, and economic and political interests converge. Like the rest of the African continent, the Sahel is plagued by composite challenges ranging from ongoing political instability and human insecurity to food security challenges exacerbated by climate change and unfavourable environmental conditions.<sup>1</sup> For instance, flooding in July 2023 in Niger led to a humanitarian disaster. More than 137,797 people were negatively impacted, 41 killed while thousands of livestock and almost 4 tonnes of food was destroyed.<sup>2</sup> The worsening political instability, exemplified by a recent wave of military coups, has sharpened focus on the fragility of democracy and constitutional rule in the region. Countries already under military rule are showing signs of fragility making them highly susceptible to future military coups, political instability and weakened democratic rule. Security challenges, particularly vio-

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<sup>1</sup> See for instance Ahmet Berat Çonkar, "Development and Security Challenges in the Sahel Region", in *NATO Parliamentary Assembly Reports*, December 2020, <https://www.nato-pa.int/node/84030>; Adama Dieng, "The Sahel: Challenges and Opportunities", in *International Review of the Red Cross*, Vol. 103, No. 918 (2021), p. 765-779, <https://international-review.icrc.org/node/109606>.

<sup>2</sup> OCHA, *Niger Flash Update: Inondations (au 11 Septembre 2023)*, <https://reliefweb.int/node/3998231>.

lent extremism, criminal activities, communal tensions, and violent protests have expanded both in scope and in geographic reach in the last 15 years.<sup>3</sup> The Armed Conflict Location and Event Data (ACLED) project reports a significant escalation in violence across the Sahel, with a 50 per cent increase in fatalities from violent incidents between 2021 and 2022. Additionally, millions have been internally and externally displaced due to ongoing conflict and the humanitarian crisis.<sup>4</sup> Furthermore, the region's geo-strategic positioning as a transit corridor connecting sub-Saharan Africa, North Africa and the Middle East and Europe makes it a space for acute geopolitical competition and posturing among both old and aspiring global powers.

The four Sahelian states that are the focus of this chapter, are Mauritania, Mali, Niger and Burkina Faso although their geographical conditions – and therefore challenges – also affect parts of the Central African Republic (CAR) and Chad. Because of the interconnectedness and geographic proximity of both the Sahel and the Mediterranean regions, spill-over effects inevitably impact non-Sahelian neighbouring countries, namely Algeria, Libya, Morocco and even Nigeria, whose strategic engagement is crucial to help resolve the crisis in the Sahel. Weakened by a constellation of factors including poverty, socioeconomic deprivation, weakness of security forces, humanitarian crises, availability of arms and light weapons, illicit goods, trafficking and irregular migration, the Sahel now faces the triple-nexus challenge of integrating humanitarian, development, and security agendas. Collectively, these developments are transforming the strategic landscape of Europe's southern neighbourhood and with it the Mediterranean security complex which now extends to the Sahel. The success of Italy's new Mattei Plan for Africa,<sup>5</sup>

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<sup>3</sup> Center for Preventive Action, "Violent Extremism in the Sahel", in *Global Conflict Tracker*, 14 February 2024, <https://microsites-live-backend.cfr.org/node/14079>.

<sup>4</sup> ACLED, *ACLED Conflict Index July 2023*, <https://acleddata.com/acled-conflict-index-mid-year-update-2023>.

<sup>5</sup> Italian Government, *Mattei Plan Steering Committee Meets at Palazzo Chigi*, 15 March 2024, <https://www.governo.it/en/node/25255>. See also, Italian Government, *The Five Pillars of the 'Mattei Plan'*, 29 January 2024, [https://www.governo.it/sites/governo.it/files/Italia-Africa\\_MatteiPlan\\_5pillars.pdf](https://www.governo.it/sites/governo.it/files/Italia-Africa_MatteiPlan_5pillars.pdf).

while avoiding direct engagement with security issues in the region, hinges on the region's enhanced security landscape.

### *3.1 Impact of fragility on security, governance and democracy in the Sahel*

Africa has witnessed at least seven successful military coups since August 2020 with the majority of these taking place in what is now referred to as the “Coups Belt” of Africa<sup>6</sup> – an area covering parts of West and Central Africa as well as the Sahel region. Between 2021 and 2023, Burkina Faso and Mali each experienced two putsches in quick succession.<sup>7</sup> In Mali, democratically elected President Ibrahim Boubacar Keita was overthrown by elements of the military and a few months later, a caretaker government led by President Ndaw and his Prime Minister was deposed and replaced by Col. Assimi Goita, the current military leader. Despite initial assurances by the coup leaders in Niger, Mali, and Burkina Faso of enhanced security and political stability in the region, including through joint military and counter-terrorism operations, the reality on the ground paints a starkly different picture. Political, security and humanitarian conditions are on a persistent decline with militia groups and jihadists consistently launching attacks on government institutions, civilian populations, and security personnel. Critics argue that measures at the country and regional level to confront insecurity challenges have caused more civilian casualties than they were intended to prevent. For instance, military efforts such as the recent counter-terrorism operation conducted by the Malian army in the Koulikoro region<sup>8</sup> in May 2024, and

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<sup>6</sup> The Coups Belt of Africa is a geopolitical concept and media phrase that has increasingly gained prominence in the last decade or so to describe regions of West Africa, Central Africa and the Sahel that have a high prevalence of military *coups d'état*.

<sup>7</sup> Sohaib Mahmoud and Mohamed Taifouri, “The Coups d’État of the Sahel Region: Domestic Causes and International Competition”, in *ACW Policy Analysis*, 27 September 2023, <https://arabcenterdc.org/?p=28285>.

<sup>8</sup> Mamadou Tapily, “As Army Operations Ramp Up in Mali, Rebel Groups Impose ‘Suffocating’ Blockades”, in *The New Humanitarian*, 12 March 2024, <https://www.thenewhumanitarian.org/node/263321>.

another operation in Timbuktu region town of Niafunke<sup>9</sup> in April 2024 led to civilian casualties while the security situation in both regions remains largely unchanged. Seizure of various weapons, ammunition, and equipment by Malian authorities during both operations has not led to notable improvements in Mali's overall security.

Mali's putschists have reneged on their promise to return the country to civilian and constitutional rule. Elections scheduled to be held in February 2024 were indefinitely postponed.<sup>10</sup> In neighbouring Burkina Faso, President Roch Marc Christian Kaborè was ousted from power by a military junta in January 2022. He was replaced by Paul-Henri Damiba – a military colonel who assumed power the following month. Eight months later, Damiba was also ousted from his position and replaced by his junior, Captain Ibrahim Traore. Burkina Faso has indefinitely postponed elections, initially scheduled to be held in July 2024 amid a deteriorating security and political situation. In February 2024, armed groups launched a series of attacks in the Est and Nord regions, resulting in at least 150 deaths and scores of injuries among the civilian population. OCHA estimates that there are currently over 2 million internally displaced persons (IDPs) with an estimated 980,000 IDP cases recorded in 2023 alone.<sup>11</sup> Growing insecurity in most areas continues to impede humanitarian efforts from reaching those in most need.

In Burkina Faso, the interim government's ongoing challenges to curtail the plight of insecurity saw the government extend the general mobilisation law for 12 months on 27 March 2024. The law – which came into effect on 19 April 2023 – allows the state to enlist men over the age of 18 into the armed forces for a period of one year if required. It also creates

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<sup>9</sup> "Mali Army 'Neutralises' Five Terrorists", in *Panapress*, 24 April 2024, [https://www.panapress.com/Malian-Army-neutralises-five-ter-a\\_630767025-lang2.html](https://www.panapress.com/Malian-Army-neutralises-five-ter-a_630767025-lang2.html).

<sup>10</sup> "Mali Junta Delays February Election for Technical Reasons", in *France 24*, 25 September 2024, <https://www.france24.com/en/africa/20230925-mali-junta-delays-february-presidential-election-for-technical-reasons>. See also, Damien Glez, "Elections in Mali and Burkina Faso Postponed Forever", in *The Africa Report*, 6 May 2024, <https://www.theafricareport.com/346803/elections-in-mali-and-burkina-faso-postponed-for-forever-and-a-day>.

<sup>11</sup> OCHA, *Burkina Faso: Humanitarian Snapshot (as of 31 January 2024)*, <https://relief-web.int/node/4045634>.



a provision for civilians to mobilise themselves and defend their territories “under the supervision of the defence and security forces” against “all forms of threats, including terrorist groups”.<sup>12</sup> The law was put into effect amid wider attempts by the government to enhance its counter-insurgency operations, which have proven ineffective to date. While authorities have not given an indication of what would trigger a general mobilisation, the extension has raised fears with government critics noting that the mobilisation law infringes on people’s rights including freedom of association and movement. Opposition and civil society groups argue that given the rampant insecurity, a general mobilisation is unlikely to significantly bolster the government’s efforts to curtail militancy, which remains pervasive in most areas outside of Ouagadougou.

A survey conducted by Afrobarometer showed that demand for elections had dropped significantly in countries that have experienced or are under military rule. For instance, between 2011 and 2023, demand for elections dropped by 19 percentage points in Burkina Faso, 15 in Mali and 8 in Niger.<sup>13</sup> Decline in demand for electoral participation in these countries reflects a combination of coercive tactics (fear and repression), institutional erosion (lack of trust in institutions and limited political participation) and political repression. Narratives that emphasise “stability” over democracy and good governance remain key features of governance and statecraft in Mali, Burkina Faso, and Niger.

### *3.2 The Sahel’s triple challenge: Integrating humanitarian, development and security agendas*

The so-called Arab Spring or Arab uprisings, along with subsequent crises in Mali and Libya, has had profound implications for development and security in the Sahel. The uprisings that swept across North Africa

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<sup>12</sup> “Security: Burkina Extends General Conscription by a Year”, in *APA News*, 28 March 2024, <https://apanews.net/security-burkina-extends-general-conscription-by-a-year>.

<sup>13</sup> Hervé Akinocho, “As Africans Enter Busy Political Year, Scepticism Marks Weakening Support for Elections”, in *Data for Governance Alliance Policy Briefs*, No. 24 (1 February 2024), <https://dataforgovernance.africa/wp-content/uploads/2024/04/ad761-pap7-in-busy-political-year-scepticism-marks-africans-weakening-support-for-elec-3.pdf>.

in 2011 sparked a wave of instability, leading to cascading effects that reverberated throughout the region. In particular, the fall of Libya's Muammar Gaddafi and the attendant humanitarian and security crises signalled a tectonic shift. It resulted in the proliferation of weapons and the influx of armed groups into neighbouring Sahelian countries specifically in Mali, Niger, and Chad.<sup>14</sup> This influx exacerbated existing tensions and fuelled conflict, contributing to the deterioration of security conditions in the region.

In Mali, the Arab 'Spring'-inspired Tuareg rebellion in the north quickly escalated into a full-blown crisis, leading to a military coup and the establishment of Islamist militant groups in the region. Although an endogenous phenomenon, the Tuareg rebellion was undoubtedly helped by the return from Libya of battle-hardened Malian Tuareg who had served in Gaddafi's army.<sup>15</sup> For instance, in the early 1970s, Gaddafi established the Islamic Legion, a military force aimed at promoting the unification of an Islamist state in north Africa. Attracted by promises of financial rewards and other incentives, many ethnic Tuareg joined the Legion. Despite its disbandment in the 1980s, a significant number of Tuareg members remained in Libya and were integrated into the country's armed forces. Additionally, many of the Tuareg who served in Gaddafi's army found a safe sanctuary in Libya after a failed rebellion in 2008. Today, the Malian and Libyan dynamics feed off each other in complex ways. For instance, southern Libya has become at the same time a haven for those who fled the war in northern Mali, but also more disturbingly a temporary fallback zone for mercenaries and terrorist groups.<sup>16</sup> The subsequent intervention by French and regional forces, while successful in pushing back militant groups, failed

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<sup>14</sup> Dario Cristiani, "The Sahelian Crisis and the Arab Spring", in Andrea Dessì et al., "Africa and the Mediterranean: Evolving Security Dynamics after the Arab Uprisings", in *GMF Mediterranean Papers*, No. 25 (February 2014), p. 1-11, <https://www.iai.it/en/node/1631>.

<sup>15</sup> Clionadh Raleigh, Héní Nsaibia and Caitriona Dowd, "The Sahel Crisis since 2012", in *African Affairs*, Vol. 120, No. 478 (January 2021), p. 123-143, DOI 10.1093/afraf/adaa022.

<sup>16</sup> Candice Moore, "Four Years after the Fall of Gaddafi: The Role of the International Community in Stabilising a Fractured Libya", in *Conflict Trends*, Vol. 15, No. 1 (2015), p. 50-56.

to address underlying grievances and root causes of instability and insecurity. The fallout from these twin crises has been far-reaching, including increased transnational crime, terrorism, and inter-communal violence. The porous borders and vast ungoverned spaces in the Sahel have facilitated the movement of illicit goods and non-state armed actors, posing significant challenges to regional stability and governance. Security gaps and state absence have emboldened militant groups who continue to grow in both ambition and geographic reach.<sup>17</sup>

The Arab uprisings also led to a reawakening of religious and cultural identities as witnessed in North Africa. Emboldened by amnesties in Tunisia and Egypt as well as the opening of prisons in Libya, many Islamist groups re-entered the national political front – a key example being the emergence of Islamist political parties, for instance the Muslim Brotherhood family which contested and won elections in Egypt and Tunisia.<sup>18</sup> In post-revolution Libya, the Muslim Brotherhood, temporarily supported by Salafist groups and other non-state armed actors like Libyan Arab Armed Forces (LAAF) have been nibbling away at the authority of national institutions. These groups have witnessed a surge in their political sway, largely attributed to heightened dissemination of their ideologies, facilitated by the relaxation of restrictions on preaching following the dissolution of oppressive autocratic regimes.

### *3.3 Dynamics of fragility and insecurity in the Sahel*

Growing fragility and insecurity in the Sahel region has roots in the so-called Arab Spring, alongside other contributing factors such as feelings of marginalisation, lack of access to essential services and opportunities, and ongoing inter-communal conflicts. These elements collectively create conducive conditions for the proliferation of non-state armed groups. While mass political mobilisation did not materialise outside the Arab world, the turmoil in North Africa triggered a chain reaction that exacerbated ethnic and religious based tensions, especially in the Sahel. Three

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<sup>17</sup> Clionadh Raleigh, Hédi Nsaibia and Caitriona Dowd, “The Sahel Crisis since 2012”, cit.

<sup>18</sup> Samir Amin, *The Reawakening of the Arab World. Challenge and Change in the Aftermath of the Arab Spring*, New York, Monthly Review Press, 2016.

major effects emerged from the Libyan and Malian crises: greater porosity of borders due to state collapse following rebellion and civil war, proliferation of small and light weapons and other sophisticated weapons, most of which were left unsecured in storage facilities across Libya, and greater mobility of militants, most notably Islamist radicals committed to a violent jihadist ideology.<sup>19</sup> Libya's civil wars precipitated significant waves of both human migration and arms trafficking. With the deterioration and stagnation of Libya's previously robust economy, economic migrants from neighbouring countries returned home or sought livelihoods elsewhere. Some migrated or attempted to move to Europe while others were compelled or voluntarily relocated southward towards Chad, Niger and Mali.<sup>20</sup>

Internal fragmentation remains a key challenge in the Sahel, rendering the region a breeding ground for multiple centres of violence and power contestation. Corral et al. predict that up to two-thirds of the world's poor, the majority of whom reside in sub-Saharan Africa, will live in fragile and conflict-prone areas by 2030.<sup>21</sup> In countries like Mali and Niger, extremist armed groups exploit pre-existing rivalries between farmers and herds-men over access to land, water and grazing pastures. The Malian crisis and its aftermath, for instance, turned Libya, Tunisia, Mali, Niger and Chad into cross-border security risks whose internal fragmentation makes it increasingly difficult to develop effective and coherent responses to violent manifestations of polycrisis.<sup>22</sup> As a result, most countries grapple with political uncertainties and insecurity generated by rigged elections, unconstitutional changes of power and the proliferation of non-state armed actors seeking

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<sup>19</sup> Clionadh Raleigh, Héni Nsaibia and Caitriona Dowd, "The Sahel Crisis since 2012", cit.

<sup>20</sup> Lucia Pradella and Sahar Taghdisi Rad, "Libya and Europe: Imperialism, Crisis and Migration", in *Third World Quarterly*, Vol. 38, No. 11 (2017), p. 2411-2427, DOI 10.1080/01436597.2017.1350819.

<sup>21</sup> Paul Corral et al., *Fragility and Conflict. On the Front Lines of the Fight Against Poverty*, Washington, World Bank, 2020, <https://hdl.handle.net/10986/33324>.

<sup>22</sup> Conceptually, "polycrisis" is a term used to describe a type of complexity wherein multiple crises, converge, and intertwine presenting formidable challenges to peace, security, and development efforts – see for example: Michael Lawrence, Scott Janzwood and Thomas Homer-Dixon, "What Is a Global Polycrisis? And How Is It Different from a Systemic Risk?", in *Cascade Institute Discussion Papers*, No. 2022-4 (September 2022), <https://cascadeinstitute.org/?p=1430>.

to challenge state authority. Challenges linked to a rise in insurgency and violent extremism, population displacements coupled with socioeconomic hardships and demographic challenges are creating a perfect storm for instability and insecurity in the Sahel. For example, in Niger, growing insecurity and military clashes to the death of at least six soldiers in the Tillabéri region in April 2024. The army responded with a broad-based counter-terrorism operation to neutralise the assailants.<sup>23</sup> The attacks were attributed to members of the Islamic State-affiliated ISGS militant group, which maintains an operational presence in the Tillabéri region.

Recurring militia attacks are symptomatic of the extreme-risk environment in the Tillabéri region, which is under a state of emergency conditions. In addition to being subject to frequent acts of militancy, the area remains a focal point for counter-terrorism operations, which have also resulted in high levels of civilian deaths. In Mali, more than 110 civilians were abducted in the Mopti region in April 2024. According to government officials in the region, a passenger bus carrying civilians was ambushed on the road between Bandiagara and Bankass by unidentified militants.<sup>24</sup> While there have been no immediate claims of responsibility for the attack, the *modus operandi* suggests that it could have been carried out by members of militant groups aligned with either the Islamic State or al-Qa-eda, both of which maintain an operational presence in the Mopti region.

In May 2024, suspected Islamist extremists reportedly damaged a strategic weighbridge in Niger's Tillabéri region town of Moussi Baga, which serves as a border crossing to the Burkina Faso town of Kantchari in Tapoa province.<sup>25</sup> While it is unclear if there were any civilian or military casualties during the attack, the location and *modus operandi* used

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<sup>23</sup> AFP, "Six Nigerian Soldiers Killed in Landmine Blast", in *VOA Africa*, 11 April 2024, <https://www.voaafrica.com/a/7565785.html>. See also, "Several Nigerien Soldiers Killed in Ambush Near Burkina Faso and Mali Border", in *France 24*, 22 March 2024, <https://www.france24.com/en/africa/20240322-several-nigerien-soldiers-killed-in-ambush-near-burkina-faso-mali-border>.

<sup>24</sup> "Mali: More than 110 Civilians Kidnapped by 'Suspected Jihadists'", in *Africa News*, 22 April 2024, <https://www.africanews.com/2024/04/22/mali-more-than-110-civilians-kidnapped-by-suspected-jihadists>.

<sup>25</sup> Interview with local journalist in Mali, 6 May 2024.

in the incursion suggest that the perpetrators were likely members of the Islamic State-aligned ISGS network, which maintains an acute operational presence in Niger's Tillaberi region and across much of the tri-border area with Niger, Burkina Faso and Mali. The destruction of transportation infrastructure may be an attempt by Islamist extremists to disrupt cross-border counter-terrorism operations between the militaries of Burkina Faso, Niger and Mali. With a deteriorating security situation in the region, further acts of violence targeting strategic infrastructure remain likely in the immediate term.

In May 2024, local news sources in Mali reported an attack by Islamist militants in the Menaka region, resulting in the blockade of the city.<sup>26</sup> This action effectively restricted physical access to key routes and disrupted vital supply lines, leading to a surge in the prices of essential goods. Unconfirmed reports suggest that the siege was orchestrated by ISGS. The siege on Menaka is indicative of the significant control and influence which non-state armed actors possess over large swaths of the Malian state. In fact, reports show that despite increased military spending, the security situation in the region has continued a downward spiral. Most of the Sahelian countries struggle to respond to the security demands of their populace, and in countries severely impacted by proliferation of non-state armed groups, like Mali, Niger and Burkina Faso, a failing social contract is accompanied by the return of military coups and militarisation of politics which in turn fuels political instability and insecurity. Local defence militia groups have been accused of carrying out atrocities against civilians. A report by the International Institute for Strategic Studies' Armed Conflict Survey 2023 shows that in 2023 alone, sub-Saharan Africa accounted for 48 per cent of global deaths from terrorism with the majority of attacks concentrated in the Sahel region.<sup>27</sup>

While military leaderships in the three countries have vowed to tackle the rise of violent armed groups in their countries including through the

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<sup>26</sup> Human Rights Watch (HRW), *Mali: Islamist Armed Groups, Ethnic Militias Commit Atrocities*, 8 May 2024, <https://www.hrw.org/node/387978>.

<sup>27</sup> IISS, "From Global Jihad to Local Insurgencies: The Changing Nature of Sub-Saharan Jihadis", in *Armed Conflict Survey 2023*, 6 December 2023, <https://www.iiss.org/en/publications/armed-conflict-survey/2023/from-global-jihad-to-local-insurgencies>.

newly formed Alliance of the States of the Sahel, the security situation on the ground remains dire with both government forces and pro-government militias accused of perpetuating human rights violations and abuses. In Burkina Faso, Volunteers for the Defence of the Fatherland, a state-sponsored vigilante force fighting alongside the armed forces, has been accused of committing human rights abuses. President Traoré has made this civilian militia a cornerstone of his security policy and claims to have recruited nearly 90,000 people.<sup>28</sup> Human rights groups including Human Rights Watch reported that on 25 February 2024, the Burkinabé national army “summarily executed at least 223 civilians, including at least 56 children”.<sup>29</sup> Human Rights Watch alleges that the army went into two villages in northern Yatenga after militant groups opposing the government had passed through, and accused residents of complicity with the militants. Government forces forcibly rounded up civilians and killed them. The junta-run government dismissed the organisation’s claims as “hasty and biased” and subsequently banned all foreign media that carried the story.

According to the ACLED project, at least 30,000 people in the Sahel have been killed in violent incidents between 2020 and 2023.<sup>30</sup> In Mali, an undisclosed number of civilians traveling in three buses on the road between Bandiagara and Bankass were ambushed and kidnapped on 16 April 2024 by the Jama’a Nusrat ul-Islam wa al-Muslimin (JNIM) militant group in Mopti region. According to reports, those released are primarily women and children. At the time of writing, militants are still holding other hostages among the 110 initially kidnapped. JNIM and its constituent groups are believed to have been involved in several local and international kidnappings for ransom and influence since 2015. Residents of Kidal, Menaka and Gao in northern and central regions of Timbuktu continue to live in fear of the al-Qaeda-affiliated group. In Niger, at least

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<sup>28</sup> Pierre Wendpuire, “Critics of Burkina Faso’s Junta Keep Ending Up on the Front Lines”, in *The Continent*, 27 April 2024, <https://continent.substack.com/p/critics-of-the-junta-keep-ending>.

<sup>29</sup> HRW, *Burkina Faso: Army Massacres 223 Villagers*, 25 April 2024, <https://www.hrw.org/node/387833>.

<sup>30</sup> ACLED, *ACLED Conflict Index July 2023*, cit.



five soldiers were killed and several seriously wounded when a Nigerien army patrol vehicle was ambushed by militants near the Diffa region village of Lada, on the border with Nigeria. The incident was reported on 24 April, when the soldiers were preparing to leave to guard an agricultural development project in the region.<sup>31</sup> The attack was attributed to the Boko Haram group – which, along with its rival ISWAP jihadist group – conducts semi-regular attacks in Diffa. The incident highlights the prevalence of violent extremism in the Diffa region, despite counter-terrorism efforts by the state amid an ongoing, area-specific state of emergency. Similarly, in Mali, at least six soldiers were killed and numerous others wounded in a militant attack in the Tillabéri region department of Filingue on 21 April 2024. The army responded with a broad-based counter-terrorism operation to neutralise the assailants.

### *3.4 Geopolitical competition and posturing in the Sahel*

After years of prioritising relations with the West, mainly the EU and the US, many Sahelian countries along with other African countries are recalibrating their foreign policy and adapting their policy tools to reflect the dynamism and shifts in the international geopolitical system. Since the start of the century, several international actors have established a presence in the Sahel, merging individual interests with regional interests for security and stability. New centres of power are emerging with Russia, China and the Gulf states increasing their presence in the Sahel and entering into new military and security cooperation agreements with several African countries. Russia, for instance, has signed economic and security agreements with over 40 African countries signalling mounting geopolitical frictions and competition on the continent.<sup>32</sup> At its Russia-Africa summit in 2019, Moscow pledged to double trade with African countries to over 40 billion dollars over a five-year period (2020–2025)

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<sup>31</sup> “Several Nigerien Soldiers Killed in Ambush Near Burkina Faso and Mali Border”, in *France 24*, cit.

<sup>32</sup> Mathieu Droin and Tina Dolbaia, “Russia Is Still Progressing in Africa. What’s the Limit?”, in *CSIS Reports*, August 2023, <https://www.csis.org/node/106779>.



and promised to wipe out debts worth 23 billion dollars.<sup>33</sup> It remains unclear whether Moscow will deliver on its debt-forgiveness promise given the impact of US and EU sanctions on Russia's economy. Renewed international interest and growing engagement with African countries including in the Sahel can be viewed as a demonstration of African countries' ability to exercise both individual and collective agency. However, without clearly defined objectives and goals, geopolitical competition can undermine efforts to address the region's humanitarian and security situation. On the other hand, African countries' attempts to diversify global economic and security partnerships, or at least revive old ones, has not improved the living and security conditions of millions who continue to face abject poverty and insecurity.

Major global geopolitical actors are aware of the geostrategic importance of the Sahel region. Competition to strengthen their positions through investments, and strategic positioning close to influential areas such as Libya and the Eastern Mediterranean, and waterways like the Red Sea, along with their concern for crucial regional issues including terrorism and irregular migration, amplify the geopolitical friction and competition in the Sahel. In May 2024, Reuters reported that an undisclosed number of Russian military personnel had moved into an air base in Niger that is also hosting US troops. A senior US Defence official clarified that the Russian forces were present in a separate hanger at the US Airbase 101, which is next to Diori Hamani International Airport in Niamey. The location is one of two important US military bases in the country.<sup>34</sup> Following the July 2023 military coup, the US military moved some of its forces from Airbase 101 to Airbase 201 in the Agadez region. This new development comes a few weeks after Russian security personnel arrived in Niamey on 10 April 2024. Public broadcaster Radio Television du Niger aired footage of a Russian military cargo plane with a team of military personnel and various equipment arriv-

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<sup>33</sup> Alex Vines and Toghisti Amare, "Russia-Africa Summit Fails to Deliver Concrete Results", in *Chatham House Expert Comments*, 2 August 2023, <https://www.chatham-house.org/node/32460>.

<sup>34</sup> Phil Stewart and Idrees Ali, "Russian Troops Enter Base Housing US Military in Niger, US Official Says", in *Reuters*, 3 May 2024, <https://www.reuters.com/world/africa/russian-troops-enter-base-housing-us-military-niger-us-official-says-2024-05-02>.

ing to reportedly assist the Nigerien army with counter-terrorism training.<sup>35</sup> Following its July 2023 coup, the Nigerien transitional administration has rapidly severed diplomatic, security and economic ties with traditional Western partners – most notably the US and France – and pivoted towards Russia and Iran. This pivot, which includes severing a decade-long military agreement with the US, comes at the expense of significant US military, economic, developmental, and humanitarian support to Niger. For instance, between 2013 and 2023, the US spent nearly 1 billion dollars in Niger, helping to provide a vast range of assistance to deliver clean water and health care; counter the pernicious effects of climate change; and train and equip a beleaguered army against jihadi attacks.<sup>36</sup>

In another significant turn of events signalling strained relations with France and the US, in April 2024 local news sources claimed that the Malian army and state-aligned Russian paramilitary forces had conducted a joint counter-terrorism operation on Mauritanian soil and arrested two Mauritanian nationals on unspecified charges.<sup>37</sup> The incident is said to have taken place near the Hodh El Chargui region border town of Adal Bakro. While this account is disputed by other local sources who claim the incident occurred within Malian territory, it follows a similar incident on 7 April 2024, when the army and Russian paramilitary forces entered the village of Madallah, also in the Hodh El Chargui region, in pursuit of JNIM militant group extremists.<sup>38</sup> Four Mauritanian civilians were wounded during the cross-border incursion. The incident drew condemnation from the Mauritanian government, which subsequently summoned the Malian ambassador to lodge a diplomatic protest. Both these incidents demonstrate Moscow's desire to outmanoeuvre its competitors by entrenching and solidifying its presence in the region in exchange for lucrative security contracts and mining concessions.

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<sup>35</sup> AP, "Russian Military Trainers Arrive in Niger as African Country Pulls Away from US", in *The Guardian*, 12 April 2024, <https://www.theguardian.com/p/qc5xj>.

<sup>36</sup> Cameron Hudson, "How the United States Lost Niger", in *Foreign Policy*, 2 April 2024, <https://foreignpolicy.com/2024/04/02/us-niger-sahel-military-deal-russia-china>.

<sup>37</sup> HRW, *Mali: Islamist Armed Groups, Ethnic Militias Commit Atrocities*, cit.

<sup>38</sup> Ibid.

### 3.5 Regime reconfiguration and geopolitical pivoting and its impact on security in the Sahel

Sahel countries' relations with the West, specifically France – a colonial power in the region – are riven with often unnecessary tensions and rivalry. These developments come at a time of heightened regional insecurity and ideological polarisation over waning French influence in Mali, Burkina Faso, and Niger. For instance, in August 2022, French military forces withdrew from Mali, ending a nine-year security and military cooperation that started in 2012 under Operation Serval.<sup>39</sup> Operations Serval (2012–2013) and Barkhane (2014–2022) while crucial in filling the security vacuum created by state absence failed to quell growing insecurity in Mali and the broader Sahel region. Tensions between France and Burkina Faso were further aggravated when the interim government declared three French diplomats as *personae non gratae* on 18 April 2024. The diplomats were given 48 hours to leave the country and accused of “subversive activities”.<sup>40</sup> This development comes amid a breakdown of relations between the two countries, with the French government ordering the country's institutions in September 2023 to suspend any form of cooperation, services, and projects with Burkina Faso. In April 2024, Niger asked the US government to withdraw its military forces stationed in the city of Agadez, northwest of the capital.<sup>41</sup> Niger has been home to a major US airbase, using it for manned and unmanned surveillance flights and other operations. The US has invested nearly 280 million dollars in training Niger's military since it resumed operations in 2013. This coordinated anti-West sentiment in the Sahel attests to tanking relations between the West (France and the US) and the military juntas in Mali, Burkina Faso, and Niger. In September 2023, military leaders in Mali, Burkina Faso and Niger met in Bamako to sign the founding charter of the Alliance of the

<sup>39</sup> “Last French Troops Leave Mali, Ending Nine-Year Deployment”, in *Al Jazeera*, 16 August 2022, <https://aje.io/xcpyz1>.

<sup>40</sup> “Burkina Faso Expels Three French Diplomats Accused of ‘Subversive Activities’”, in *France 24*, 18 April 2024, <https://www.france24.com/en/africa/20240418-burkina-faso-expels-three-french-diplomats-accused-of-subversive-activities>.

<sup>41</sup> “US to Complete Withdrawal from Niger by Sept. 15”, in *Reuters*, 19 May 2024, <https://www.reuters.com/world/africa/us-complete-withdrawal-niger-by-sept-15-2024-05-19>.

States of the Sahel – a new regional scheme for defence cooperation and mutual assistance between the three countries.<sup>42</sup> They also threatened mass withdrawal from the regional organisation Economic Community of West African States (ECOWAS), accusing the regional bloc of becoming a threat to member states. The current security architecture involving different actors leads to actor fragmentation which in turn limits synergies and engagement between different security actors. This often leads to inconsistent and ineffective approaches to crisis prevention, conflict management and resolution.

### *3.6 Russia's military-economic footprint in the Sahel: Implications for European policy*

In December 2023, Russia took a significant diplomatic step by reopening its embassy in Burkina Faso, marking a notable reengagement after nearly three decades since the closure of its diplomatic mission in 1992.<sup>43</sup> In April 2024, reports emerged indicating Moscow's intentions to establish diplomatic missions in three additional African countries: Niger, South Sudan and Sierra Leone.<sup>44</sup> This strategic move underscores Russia's renewed interest in and commitment to fostering stronger diplomatic ties, security and economic cooperation with Africa, signalling a departure from its previous stance of "limited engagement" since the early 1990s. For the Sahel, the security variable constitutes a fundamental basis for renewed Russian policy and its attempts to exert influence in the region. Replicating its role in Libya, and Syria, Moscow has signed numerous security and military cooperation agreements as the basis for sale of Russian arms to Sahel countries, including the CAR, Mali, Burkina Faso and Niger.

Furthermore, the Wagner Group, formerly a private military company, has significantly expanded its presence in various countries across

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<sup>42</sup> "Burkina Faso, Mali and Niger to Form Joint Force to Fight Jihadist Insurgency", in *AfricaNews*, 7 March 2024, <https://www.africanews.com/2024/03/07/burkina-faso-mali-and-niger-to-form-joint-force-to-fight-jihadist-insurgency>.

<sup>43</sup> "Russia Reopens Embassy in Burkina Faso", in *BBC News*, 23 December 2023, <https://www.bbc.com/news/world-africa-67833215>.

<sup>44</sup> Chinedu Okafor, "3 African Countries Could Play Host to Russian Diplomatic Missions", in *Business Insider*, 24 April 2024, <https://africa.businessinsider.com/mke94es>.

the region, including the CAR, Libya, and Mali. Recognising Russia's growing significance and geopolitical strategies is essential for understanding its impact in the Sahel. Africa's diplomatic discourse prioritises self-assertion at both continental and national levels, pragmatic foreign policies and a balance of cooperation and competition. Russia's disruptive role in the region, often acting as a "spoiler", undermines the efforts of European countries and the US along the southern shore, thus destabilising the area. Russia's approach to the Sahel is multifaceted and encompasses the provision of security services, political consultation, media manipulation, dissemination of disinformation and arms sales. In exchange, entities like the Wagner Group gain political leverage and access to exploit the region's abundant natural resources including gold, oil, and diamonds in countries like the CAR, Libya, Mali and Sudan.<sup>45</sup> The utilisation of private military companies (PMCs) to advance geopolitical agendas is not a novel concept. PMCs offer a cost-effective means for countries to project influence while maintaining plausible deniability. It is pertinent to note, however, that until recently, the Wagner Group lacked a distinct ideology and primarily operated for financial gain.

On the economic front, Russia has signed economic partnerships with several African countries, including an agreement pertaining to a roadmap for the construction of a nuclear plant in Burkina Faso signed by the government and the state-owned Russian State Atomic Energy Corporation (Rosatom) on 26 March 2024.<sup>46</sup> The agreement was signed on the side-lines of the International Forum on Nuclear Energy in Sochi, Russia. Part of the deal entails the training of Burkinabe citizens in Russian universities in nuclear-related disciplines, a drive for public awareness about the establishment of a nuclear power plant, and the establishment of parameters for the evaluation and development of nuclear

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<sup>45</sup> Debora Patta and Sarah Carter, "How Russia's Wagner Group Funds Its Role in Putin's Ukraine War by Plundering Africa's Resources", in *CBS News*, 16 May 2023, <https://www.cbsnews.com/news/russia-wagner-group-ukraine-war-putin-prigozhin-africa-plundering-resources>.

<sup>46</sup> "Agreements with Burkina Faso, Nicaragua and Kazakhstan at Atomexpo", in *World Nuclear News*, 26 March 2024, <https://world-nuclear-news.org/Articles/Agreements-Burkina-Faso-Nicaragua-and-Kazakhstan>.

activity in the country. The development of a nuclear power plant could help the country meet its energy targets with several spin-offs including job creation. These economic partnerships highlight strengthened ties between Russia and Sahel countries, further entrenching Russian presence in the region. A survey conducted by Gallup, an American consulting firm, reveals that Russia, together with China, has surpassed the US in approval ratings in Africa. In 2023, US approval stood at 56 per cent, while China's rating was 58 per cent and Russia's was 64 per cent.<sup>47</sup>

### *3.7 Opportunities and challenges for Italian foreign policy in the Sahel and Mediterranean regions*

Several international initiatives have been launched to address the triple-nexus challenge in the Sahel. Some of these initiatives focus on the military dimension of counterterrorism, while others concentrate on the relationship between security and development. Even with its current challenges, the Sahel offers a multitude of opportunities for investment and development that Italian policy makers can leverage for development impact. With an initial funding of 5.5 billion euros, the Mattei Plan could streamline its investments to help Sahelian countries withstand global economic shocks, create job opportunities for young people and help countries build resilience against climate change, environmental degradation, and growing food insecurity. Targeting key areas including renewable energy, education and culture, agriculture and infrastructure is key to job creation, youth, and women's empowerment and long-term stability. However, due to its limited fiscal space, Italy alone will not be able to bridge Africa's huge financing gap. To cement its position as a trusted development partner, Italy must leverage its global networks and rally Africa's major development partners, including the EU, to work towards reinforced multilateral and cooperative solutions to scale up financial flows and promote economic and political reforms that create the conditions for sustainable and inclusive growth benefiting African countries.

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<sup>47</sup> Benedict Vigers, "U.S. Loses Soft Power Edge in Africa", in *Gallup Articles*, 26 April 2024, <https://news.gallup.com/poll/644222/loses-soft-power-edgeafrica.aspx>.

Diplomatically, the Mattei Plan offers Italy a platform to enhance its engagement and influence in Africa, a continent of increasing strategic importance due to its economic and geopolitical significance alongside security concerns including curbing irregular migration and the threat of terrorism. However, Italian policy makers should guard against turning the Mattei Plan into another failed migration containment policy tool. Creating and investing in reciprocal “win-win” partnerships can strengthen diplomatic ties with African countries, promote economic development and advance Italian interests on the global stage. However, to attract public and private investments in Africa, Italy will have to leverage partnerships with key actors on the continent including the EU, the US and China and for core initiatives like the Comprehensive Africa Agricultural Development Programme, the Programme for Infrastructure Development in Africa, and the African Continental Free Trade Area. Additional efforts must focus on investing in high impact sectors including education and training programmes for the next generation of Africa leaders and policy makers. Exchange programmes and short training courses at Italian universities and research centres, for instance the Young African Leaders Programme at the Florence School of Transnational Governance of the European University Institute, are crucial to promoting good governance and democratic rule, and enhancing regional and intercontinental cooperation between Africa and Europe.

However, challenges in the Sahel are complex and multifaceted. The region is characterised by instability, conflict, and weak governance, posing risks to investment and development initiatives. Italy must navigate complex political dynamics, including competition from other international actors and the presence of non-state armed groups whose influence cannot be overstated. The presence of a multitude of supranational security actors including the United Nations, the African Union, the Economic Community of West African States and the G5 Sahel, alongside regional bodies, and foreign actors, contributes to the shifting security and political landscape. To safeguard economic investments in the region, Italy should develop partnerships based on deal-making, rather than exclusive relationships. In practice, this entails strengthening exchanges and cooperation in areas where there is substantial common ground and accepting that there are areas where cooperation and part-



nership are not feasible due to differing political and economic interests as well as governance models.

Since one of the core objectives of the Mattei Plan is to position Italy as Europe's new energy hub, Italy can play a strategic role helping to bolster public and private sector investment in Africa, specifically in renewable energy and cross border regional power infrastructure projects. For instance, at the recent G7 Summit in Puglia (Italy), G7 leaders committed to accelerate investments in Africa's renewable sector by establishing the "Energy for Growth in Africa" initiative,<sup>48</sup> which is expected to boost private financing and the flow of concessional finance to overcome barriers to investing in Africa's renewable energy sector. Building on this and other initiatives, Italy can leverage its Presidency of the G7 to call on global financial institutions and EU member states to scale up financial support and facilitate access to climate funds for African countries. This diplomatic gesture will signal Italy's commitment to building genuine partnerships with the so-called Global South.

Given the interconnectedness between the Sahel and the Mediterranean regions, Italian approaches towards the Sahel should be complementary to those towards the Maghreb region. Algeria, Libya, Angola, Nigeria and Egypt are some of the largest oil and gas producers on the African continent, offering Italian investors opportunities to gain access to a rapidly growing energy market in Africa. Algeria, for instance, produces about 1.5 million barrels of crude a day and the government has set aside an additional 14 billion dollars to intensify oil and gas exploration to meet Europe's growing demand for energy.<sup>49</sup> In April 2024, Tunisian president Kais Saied hosted a tripartite meeting with Algeria's president Abdelmadjid Tebboune and Libyan presidential council president Mohamed al-Menfi to discuss a range of issues including economic partnerships, the fast-tracking of an electricity interconnection project and security cooperation to combat insecurity along the shared borders of

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<sup>48</sup> G7, *G7 Leaders' Statement on Energy for Growth in Africa*, 14 June 2024, <https://europa.eu/!9J9Mpt>.

<sup>49</sup> Dean Mikkelsen, "Algeria Invests in Energy Expansion: Minister Arkab Unveils \$42B Plan", in *Oil & Gas Middle East*, 13 December 2023, <https://www.oilandgasmiddleeast.com/?p=64874>.



the three countries. However, Moroccan and Mauritanian leaders were not invited to the meeting, fuelling speculation that the new coalition is part of Algeria's plan against Morocco, its regional nemesis. Deep political rifts between the two countries have prevented close economic cooperation and threaten the existence of the Arab Maghreb Union, which has not met since 2008. Italy can play a strategic role in easing regional tensions, specifically between Algeria and Morocco, by prioritising investments in renewable energy projects that bring together Algeria, Egypt, and Morocco – some of the countries that have invested heavily in renewable energy projects over the last decade. Morocco, for instance, plans to diversify its energy grid by increasing the share of renewables from 20–52 per cent by 2030 and 80 per cent by 2050.<sup>50</sup> By prioritising these critical sectors, Italy can contribute meaningfully to sustainable development and stability in both regions.

### 3.8 Conclusion

The challenges in the Sahel are complex and multifaceted and have far-reaching implications for various stakeholders. Regional cooperation, trade and free movement are taking place in a more precarious and unstable context, requiring policy makers to adapt. Accurate information is needed to better understand these unstable dynamics and their geographical dimensions, particularly how decisions made at different levels of governance impact events at various tiers of society. As Italian policy makers work to adapt and refine the Mattei Plan, a key consideration is how to integrate humanitarian, development, and security agendas in the Sahel. Here, Italian policy makers can learn from previous EU policy shortcomings especially in the Sahel where the EU's overly securitised framework and alliances with local regimes alienated civil society and reinforced dysfunctional governance and political repression – which are largely seen as drivers of radicalisation and abridgement for jihadist movements. Italy must therefore broaden its approach, striking a balance between government-to-government relations and engage-

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<sup>50</sup> MASEN, *Brochure*, 2016, [https://www.masen.ma/sites/default/files/inline-files/MASEN\\_Brochure\\_instit\\_EN\\_finale.pdf](https://www.masen.ma/sites/default/files/inline-files/MASEN_Brochure_instit_EN_finale.pdf).

ment with civil society and the private sector in addressing some of the region's most complex problems. Such an approach acknowledges that a strategic engagement centred on security is inadequate to meet the region's increasingly complex and challenging problems including climate change, poverty, economic development and infrastructure deficit, health, and gender inequality.

## 4.

## Constructive Diplomatic Shifts in the Geopolitical Landscape of the Gulf

*Mehran Haghirian*

The Gulf region has gone through periods of extreme geopolitical shifts since the aftermath of the Arab uprisings in 2011. The domestic political upheavals in the Arab world coupled with regional agitations towards the Iranian nuclear negotiations as well as the intra-Gulf Cooperation Council (GCC) chasms are some of the developments that contributed to tensions and conflicts in the turbulent decade that followed. The differing approaches to the uprisings across the Arab world, the rivalry in accomplishing similar economic diversification agendas, and the overt attempts at boosting security through varying military purchases and partnerships, have largely separated each state from the other, despite occasional alignments and sub-groupings. This period lasted until early 2021, when the region experienced a restart of constructive diplomatic engagements with a more robust foundation in sovereign decision-making and independent action. The entire region had started moving away from adventurist and costly foreign policies that had brought little benefits in the form of national security or economic interests. If anything, it was the realisation that past approaches had become the primary inhibitors of accomplishing the ultra-ambitious development agendas and national visions. Regional countries are gradually mending ties with old friends and foes, both within the GCC and between the Arab states and Iran.

This chapter assesses the shifts in the foreign policy approaches of the Gulf states since 2021, with an eye on the possibilities of further diplomatic and economic integration in the region. The chapter starts by analysing the buildup of tensions and conflicts across the region up until 2021 to capture

the reasons behind the overhaul in the decision-making calculus of the Gulf states. The chapter also looks at the reestablishment of diplomatic ties and the multilateral platforms for dialogue and cooperation that have recently sprung in the region. It then looks at the challenges facing the durability of the recent constructive diplomatic shifts under the shadow of shifting US priorities in the region. In that context, the chapter considers the various visions for regional integration in the Gulf and the role of external players such as the European Union in supporting progress towards those goals.

#### *4.1 Era of maximum regional tensions in the Gulf*

Relations between Iran and Saudi Arabia were cut following the attacks on Saudi diplomatic missions in Tehran and Mashhad in response to the execution of a Shi'a cleric by Saudi authorities in January 2016.<sup>1</sup> Bahrain also severed ties to Iran, while Kuwait, Qatar and the UAE downgraded their diplomatic ties. The principal reason behind the Saudi decision to not only cut ties but campaign for regional countries to follow suit and isolate Iran was to limit any gains Tehran was about to make after the implementation of the 2015 JCPOA. Months earlier, Saudi Arabia and the UAE had also initiated an intense military campaign in Yemen against the Houthis, a para-military group with ties to Iran.

After becoming President of the United States in January 2017, Donald Trump gradually abandoned the previous regional scheme set forth by his predecessor and pursued a new maximum pressure campaign against Iran by withdrawing from the nuclear deal, increasing sanctions, and isolating Tehran regionally and internationally. Trump's focus was on strengthening Israel, partnering with Saudi Arabia, and targeting Iran. Trump's election was well-received by some of the Arab states in the Gulf, with Saudi Arabia, the UAE and Bahrain being the most enthusiastic supporters.<sup>2</sup>

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<sup>1</sup> Ben Hubbard, "Iranian Protesters Ransack Saudi Embassy After Execution of Shiite Cleric", in *The New York Times*, 2 January 2016, <https://www.nytimes.com/2016/01/03/world/middleeast/saudi-arabia-executes-47-sheikh-nimr-shiite-cleric.html>.

<sup>2</sup> Robin Wright, "President Trump's Surprisingly Warm Welcome in the Middle East", in *The New Yorker*, 10 November 2016, <https://www.newyorker.com/news/news-desk/president-trumps-surprisingly-warm-welcome-in-the-middle-east>.

Consequently, the Gulf region drifted towards a period of maximum regional tensions. For example, the tensions with Iran had augmented so much that by May 2017, then-Deputy Crown Prince Mohammed Bin Salman ruled out the possibility of dialogue with Tehran and added that “we will not wait until the fight is inside Saudi Arabia and we will work so that the battle is on their side, inside Iran”.<sup>3</sup> Aside from Tehran, Riyadh and its primary partners further expanded regional tensions and initiated an intra-GCC conflict as well. A month later, in June 2017, Saudi Arabia, the UAE, Bahrain and Egypt imposed a land, sea, and air blockade on Qatar, largely for its support of the Muslim Brotherhood, Al Jazeera’s coverage of Arab opposition figures, and, more importantly, Doha’s differing foreign policy approach. Thus, in tandem to formalising the animosities with Iran, the blockade on Qatar shined a bright light on the varying foreign policy strategies of the GCC states and their vastly different decision-making calculus on matters of national security and interests.

In the meantime, Trump’s presidency saw increased backchannel talks between some GCC leaders and Israel, with Netanyahu confirming growing ties repeatedly.<sup>4</sup> Washington was set on unifying Arab states and Israel in confronting Iran and, by 2018, the United States proposed the creation of an ‘Arab NATO’ dubbed as the Middle East Strategic Alliance (MESA). The US State Department argued that MESA would be “anchored by a united GCC, to advance prosperity, security, and stability in the region”, and that “all participants agreed on the need to confront threats from Iran directed at the region and the United States”.<sup>5</sup> While MESA failed to take root, it was within this context that the United States mediated talks that ultimately led to the Abraham Accords in 2020, nor-

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<sup>3</sup> Sami Aboudi and Omar Fahmy, “Powerful Saudi Prince Sees No Chance for Dialogue with Iran”, in *Reuters*, 2 May 2017, <https://www.reuters.com/article/idUSKBN17Y1FK>.

<sup>4</sup> White House, *Remarks by President Trump and Prime Minister Netanyahu of Israel in Joint Press Conference*, 15 February 2017, <https://trumpwhitehouse.archives.gov/briefings-statements/remarks-president-trump-prime-minister-netanyahu-israel-joint-press-conference>.

<sup>5</sup> US Department of State, *GCC+2 Ministerial Readout*, 28 September 2018, <https://2017-2021.state.gov/gcc2-ministerial>.

malising Israel's relations with the UAE and Bahrain, and later with Morocco and Sudan.

The attacks on oil tankers in the UAE and oil installations in Saudi Arabia in 2019, which were largely blamed on Iran and its proxies, marked a significant turning point for the region.<sup>6</sup> While they acted as further motivations for signing the Abraham Accords and strengthening ties with Israel, these incidents underscored the peril of ongoing tensions with Iran and the emerging reality that the United States was no longer prepared to resort to military action in response to such provocations as was expected by the GCC states. Essentially, Donald Trump precipitated a crisis and simultaneously signalled his reluctance to address it militarily. This was clearly unwelcomed news in GCC capitals who had banked on Trump's swift actions against Iran. Moreover, while Saudi Arabia, the UAE, and Bahrain were initially strong backers of any initiative aimed at Iran, the other GCC countries were not on the same boat. Most notably, Qatar was now overtly promoting regional dialogue, while Oman continued its mediatory role in reducing tensions and managing the conflicts in the immediate neighbourhood. Even though Kuwait had cut ties with Tehran in 2017 in response to a terrorist plot linked to Hezbollah and Iran, the Kuwaiti leaders continued pursuing diplomacy and mediation and were careful to not augment the conflict.

The military attacks and overt tensions only started to subside in 2020 following both mediation efforts by regional countries as well as the repercussions of the US assassination of Iranian General Qasem Soleimani, which pushed all countries to adopt a more structured change in their foreign policy approaches. While backchannel and official ties with Israel were growing, the UAE and Saudi Arabia concurrently sought constructive engagements with Iran. Moreover, to tame the conflict between Iran and Saudi Arabia, regional countries including Iraq, Oman, Kuwait, and Pakistan were involved in transferring indirect messages

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<sup>6</sup> France, Germany and UK, *Joint Statement by the Heads of State and Government of France, Germany and the United Kingdom*, 23 September 2019, <https://www.gov.uk/government/news/joint-statement-by-the-heads-of-state-and-government-of-france-germany-and-the-united-kingdom>.

between the two sides and facilitating direct discussions. At this point, there was a regional consensus that peace and constructive diplomatic engagements are prerequisites for the accomplishments and advancement of national development visions.

#### *4.2 Restoring diplomatic ties in the Gulf*

It was Trump's defeat in the presidential elections in November 2020 that finally set the stage for a renewed diplomatic environment in the Gulf region. Just days before Joe Biden's inauguration in January 2021, the GCC states held a summit in the Saudi city of Al Ula to end the more than three years long blockade on Qatar. By November 2021, meetings in Riyadh focused on building diplomatic channels between the GCC states and Iran and enhancing regional dialogue and economic cooperation. The US-GCC Iran Working Group called "to build effective diplomatic channels with Iran", and affirmed that "deeper economic ties after the lifting of U.S. sanctions under the JCPOA are in the mutual interest of the region".<sup>7</sup> And during the Meeting of the E3+US with the GCC, it was declared that "enhanced regional dialogue and a return to mutual compliance with the JCPOA would [...] allow for more regional partnerships and economic exchange".<sup>8</sup> While the talks to revive the nuclear agreement have failed, the GCC states have been adamantly pursuing diplomacy with Iran. According to Abdulkhaleq Abdulla, there is now "a GCC-wide consensus to reach out to Iran and engage with it in the hope that it responds in kind this time around".<sup>9</sup> Further, a truly new diplomatic environment had taken over the entire Gulf with overt statements on the need for diplomacy, dialogue, and cooperation.

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<sup>7</sup> US Department of State, *U.S. GCC Iran Working Group Statement*, 17 November 2021, <https://www.state.gov/u-s-gcc-iran-working-group-statement>.

<sup>8</sup> US Department of State, *Joint Statement on the Meeting of the E3 + United States with the Gulf Cooperation Council*, 18 November 2021, <https://www.state.gov/joint-statement-on-the-meeting-of-the-e3-united-states-with-the-gulf-cooperation-council>.

<sup>9</sup> Abdulkhaleq Abdulla, "The UAE-Iran Diplomatic Reset Is Part of a Greater Focus on Regional Stability", in *The National*, 24 August 2022, <https://www.thenationalnews.com/opinion/comment/2022/08/24/a-new-chapter-in-iran-uae-relations>.

## *UAE-Iran*

Former Emirati Foreign Minister and diplomatic adviser to the UAE President, Anwar Gargash, emphasised the UAE's new approach towards Iran by saying that "our whole intention is to find a way to functionally work with Iran and ensure there is an agenda for stability and prosperity in the region that includes Iran, and others".<sup>10</sup> In an interview, Gargash said that "the UAE is not going to be a party to any group of countries that sees confrontation as a direction".<sup>11</sup> He added, "Iran is a neighbour", and "there is no doubt that we also have a constant concern about Iranian regional policies, which we see harming Iran itself. But we also have complete conviction that the way is not confrontation, because confrontation will complicate the regional scene as a whole". The UAE achieved significant success in its renewed engagements with Tehran, which began after the 2019 attacks in and around the Gulf. Ties were officially restored in August 2022.

The UAE experienced a reduction in trade with Iran due to its involvement in the 'maximum pressure' campaign from 2018 to 2020. Despite severe financial sanctions on Iran, the UAE was responsible for routing 29 per cent of Iran's 71.5 billion dollars in imports by 2017.<sup>12</sup> But by March 2019, the value of imports from the UAE to Iran decreased by 30 per cent, going from 8.2 billion dollars, to 5.7 billion.<sup>13</sup> With the resumption of diplomatic engagements, the UAE regained its position as Iran's top import partner, surpassing China, and by March 2021, total Iranian imports from

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<sup>10</sup> Nick Webster, "Iran Talks Key in Shaping Middle East's New Order, Says Dr Anwar Gargash", in *The National*, 29 March 2022, <https://www.thenationalnews.com/uae/2022/03/29/iran-talks-key-in-shaping-middle-east-s-new-order-says-dr-anwar-gargash>.

<sup>11</sup> "UAE May Send Envoy to Iran, Dr Anwar Gargash Says", in *The National*, 15 July 2022, <https://www.thenationalnews.com/uae/2022/07/15/uae-may-send-envoy-to-iran-dr-anwar-gargash-says>.

<sup>12</sup> Tuqa Khalid and Andrew Torchia, "In Dubai, US Sanctions Pressure Historic Business Ties with Iran", in *Reuters*, 19 November 2018, <https://www.reuters.com/article/idUSKCN1N014Y>.

<sup>13</sup> Esfandiyar Batmanghelidj, "UAE Earns Big as Iran Sells Oil to China", in *B&BF Articles*, 27 October 2021, <https://www.bourseandbazaar.com/articles/2021/10/27/uae-earns-big-as-iran-sells-oil-to-china>.



the UAE exceeded 9 billion dollars, approaching pre-sanctions figures. In the calendar year ending in March 2024, Iran had imported 20.8 billion dollars of goods and exported 6.6 billion dollars to the UAE.<sup>14</sup>

Dubai and Sharjah have served as major re-exporting hubs for goods from various countries destined to Iran and largely refrained from getting dragged in Abu Dhabi's conflict with Tehran. A dhow captain, for example, who was transporting "a range of Western products from perfume to hair dryers and laptops" across the Gulf from Sharjah to southern Iranian shores remarked, "we are the Iranian Amazon".<sup>15</sup> Despite often being unofficial, these exchanges have largely continued without significant disruption. This persistence reflects the deep-rooted economic ties between Iran and the UAE and underscores the interconnected nature of trade in the Gulf region. Additionally, the UAE has played a crucial role in facilitating Chinese purchases of Iranian oil, which is "making a direct contribution to the UAE economy".<sup>16</sup> Following close negotiations, the trade volume between the two countries is expected to exceed 20 billion dollars annually based on official pledges.<sup>17</sup> As Abdulla notes, "even during the worst political tensions between the two countries, trade was uninterrupted. It went down, but never stopped". Today, there has been growing interactions between Tehran and Abu Dhabi at every level, including by reinstating the UAE-Iran Joint Economic Commission, which was held in Abu Dhabi after ten years in May 2024.

### *Saudi Arabia-Iran*

Saudi Arabia and Iran held a series of talks in Iraq between security officials starting in 2019, aiming to re-establish diplomatic ties that were cut off in 2016. These talks were largely facilitated by Iraqi Prime Min-

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<sup>14</sup> "UAE-Iran Joint Economic Commission Convenes for First Time in 10 Years", in *Reuters*, 30 April 2024, <https://www.reuters.com/world/middle-east/uae-iran-joint-economic-commission-convenes-first-time-10-years-2024-04-30>.

<sup>15</sup> Benoit Faucon, "U.A.E. Trade Provides Iran with Western Goods, from Perfume to Laptops", in *The Wall Street Journal*, 5 July 2022, <https://www.wsj.com/articles/u-a-e-trade-provides-iran-with-western-goods-from-perfume-to-laptops-11657048268>.

<sup>16</sup> Esfandiyar Batmanghelidj, "UAE Earns Big as Iran Sells Oil to China", cit.

<sup>17</sup> Abdulkhaleq Abdulla, "The UAE-Iran Diplomatic Reset", cit.

ister, Mustafa al-Kadhimi and later Mohammed Al Sudani. The talks initially led to a gradual increase in Iranian diplomatic representation at the Organisation of Islamic Cooperation (OIC) and permission for Iranian pilgrims to attend the Hajj. By 2022, the Saudi Crown Prince, Mohammed bin Salman, also shifted his tone and said Iran was a neighbour, so the two countries should find a way to coexist. He said, “I hope we can reach a position that is good for both countries, and a bright future for Saudi Arabia and Iran”.<sup>18</sup> Concurrently, the Saudi Foreign Minister said that “we intend to build a positive relationship with our neighbours in Iran”.<sup>19</sup>

On the regional arena, Iran and Saudi Arabia have long been at odds in Yemen, Iraq, Syria, Lebanon, and Palestine, but they are also in a fierce competition for economic interests and political alignments on the broader Eurasian context. On the international stage, Tehran and Riyadh have been in a constant rivalry for influence and have pursued diametrically opposed roles. In the 2015–2021 period, this rivalry expanded and took on a more direct military angle as well. But actions during that time proved costly, especially because month after month new mega and giga projects were being announced under the patronage of the Crown Prince. There was a clear realisation that international investments will barely come in under the constant threat of a conflict in the Gulf.

Within this context, and after a series of indirect, and later direct, negotiations between the Saudi and Iranian security officials in Iraq, the two countries engaged in days-long discussions in Beijing in March 2023 to sign an agreement for rapprochement and the restoration of diplomatic ties.<sup>20</sup> The Chinese-facilitated agreement marked a significant

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<sup>18</sup> Vivian Nereim, “Saudi Prince Says Israel Is a Potential Ally, Not an Enemy”, in *Bloomberg*, 3 March 2022, <https://www.bloomberg.com/news/articles/2022-03-03/saudi-crown-prince-says-israel-is-a-potential-ally-not-an-enemy>.

<sup>19</sup> Marc Perelman, “‘We Intend to Build a Positive Relationship with Our Neighbours in Iran,’ Saudi FM Says”, in *France 24*, 23 September 2022, <https://www.france24.com/en/tv-shows/the-interview/20220923-we-intend-to-build-a-positive-relationship-with-our-neighbours-in-iran-saudi-fm-says>.

<sup>20</sup> Mehran Haghirian and Jacopo Scita, “The Broader Context Behind China’s Mediation Between Iran and Saudi Arabia”, in *The Diplomat*, 14 March 2023, <https://thediplomat.com/2023/03/the-broader-context-behind-chinas-mediation-between-iran-and-saudi-arabia>.

step towards de-escalation between Iran and Saudi Arabia, reaffirming past agreements of 1998 and 2001, and opening new avenues for cooperation. The Beijing Agreement received broad international support, reflecting a collective desire to reduce regional tensions. In the year since the agreement, embassies resumed operations, and there has been a significant uptick in bilateral engagements, be it through numerous phone calls between foreign ministries, reciprocal visits by various government officials, or meetings on the sidelines of international summits. In November 2023, Mohammed bin Salman hosted Iran's former president Ebrahim Raisi when he was invited to attend the special meeting of the OIC on the War in Gaza, an invitation that was withheld in the preceding decade.

Saudi Arabia's Finance Minister Mohammed Al-Jadaan said during the Financial Sector Conference in Riyadh, soon after the Beijing Agreement was signed, that "there are a lot of opportunities for Saudi investments in Iran. We don't see impediments as long as the terms of any agreement would be respected".<sup>21</sup> But total Iran-Saudi trade has never hit the one billion dollars mark, with the most trade activity taking place in 2006. The primary interaction between Iranians and Saudis have been the Hajj pilgrimage to Mecca and Medina, as well as those traveling from Saudi Arabia's Eastern Province to Mashhad and Qom in Iran. While there is a long road ahead towards closer integration, the nominal end to the overt animosities that had caused ripple effects across the region in the recent past is a significant development.

### *Kuwait-Iran*

Kuwait had also reinstated its ambassador to Tehran in August 2022, in a sign of officialising the regional rapprochements.<sup>22</sup> While Kuwait has been slow in expanding economic ties with Iran since the resumption of

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<sup>21</sup> Rachna Uppal and Aziz ElYaakoubi, "Saudi Arabia Could Invest in Iran 'Very Quickly' After Agreement – Minister", in *Reuters*, 15 March 2023, <https://www.reuters.com/world/middle-east/saudi-investment-iran-could-happen-very-quickly-after-agreement-minister-2023-03-15>.

<sup>22</sup> "Kuwait Names First Ambassador to Iran in Over Six Years", in *Reuters*, 14 August 2022, <https://www.reuters.com/world/middle-east/kuwait-names-first-ambassador-iran-over-six-years-2022-08-14>.

diplomatic ties, largely because of its own domestic political upheavals, the desire is there. Through multilateral approaches, there is potential for closer cooperation on the development of a joint gas field between Saudi Arabia, Kuwait, and Iran. Back in April 2022, Saudi Arabia and Kuwait invited Tehran to join talks in finding a way forward on the Arash/Dorra field.<sup>23</sup> While at times the two countries had shunned any Iranian claims to the fields and have signed several bilateral agreements on joint exploration and extraction, the new atmosphere for dialogue allowed for such an invitation to be made to Iran.<sup>24</sup>

### *Qatar-Iran*

Qatari officials have been consistently advocating for dialogue with Iran as far back as 2015 when Sheikh Tamim endorsed the JCPOA during his speech at the United Nations General Assembly. He said, "I assure that Iran is an important neighbor country, and that cooperation between it and our countries is in the interest of the region".<sup>25</sup> He further added that "it is time to conduct a meaningful dialogue of this kind between countries that will always remain neighbors". Moreover, during the blockade, Qatar's Deputy Prime Minister and Minister of Defence, Khalid Al Attiyah, advocated for dialogue with Iran as well. He said, "Iran is next door. We should call Iran, put all the files on the table and start to discuss to bring peace rather than war."<sup>26</sup> Further adding that, "In my own judgement, I think the United States is wiser than to enter in a war with Iran."

For Qatar, the primary consideration since the blockade has been to position the country as an international mediator. Large sums of

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<sup>23</sup> Maher Chmaytelli, "Kuwait, Saudi Arabia Invite Iran to Hold Talks on Gas-Rich Offshore Zone -SPA", cit.

<sup>24</sup> Mehran Haghirian and Matteo Moretti, "Can 'Unitisation' of Oil and Gas Fields Power Diplomacy in the Persian Gulf?", in *B&BF Articles*, 30 July 2022, <https://www.bourseandbazaar.com/articles/2022/7/30/can-unitization-of-oil-and-gas-fields-power-diplomacy-in-the-persian-gulf>.

<sup>25</sup> Qatar, *Speech of Sheikh Tamim bin Hamad al Thani at the 70th Session of the United Nations General Assembly*, New York, 28 September 2015, <https://gadebate.un.org/en/70/qatar>.

<sup>26</sup> "Qatar Won't Be Part of Any Military Action against Iran", in *AP News*, 3 June 2018, <https://apnews.com/general-news-97fe306ffca04550ada18f325fd3939f>.

money and capacity is being devoted to mediation, facilitation, and peacebuilding efforts by Doha. From liaising with the Taliban, to sponsoring peace negotiations in Sudan, brokering a political solution in Lebanon, reuniting families torn apart by Russia's war in Ukraine, and attempting to find a solution for the conflict in Gaza and the return of Israeli hostages. But in the immediate region, Qatar had claimed its position as a facilitator of talks between Iran and the United States from the early days after the US withdrawal from the JCPOA in 2018. For example, Doha was chosen as the host city for EU-mediated talks between Iran and the United States in June 2022 to revive the JCPOA. Moreover, it acted as the financial guarantor of an agreement between Tehran and Washington in September 2023 to release frozen Iranian funds in exchange for releasing Iranian-American dual nationals.<sup>27</sup> These efforts have positioned Qatar as a key partner to Iran, the United States, and the European Union.

During the 2017–2021 blockade on Qatar, Doha largely depended on Iran for transit routes blocked by other GCC states, but also for its political support. Intense diplomatic engagement between Iran and Qatar has led to several trade agreements, aiming to enhance economic partnerships but also bilateral ties. Since Tamim bin Hamad's visit to Tehran in 2020, Iran-Qatar relations have expanded significantly in both political and economic terms. Raisi's visit to Doha in February 2022 further highlighted these ties. There is a Qatari-Iranian Joint Committee on economic matters, there are over 800 Iranian companies operating in Qatar, and there is now a Qatari-Iranian Business Council.<sup>28</sup> Qatar Tourism opened an office in Tehran in 2022 as "one of 15 target markets identified [...] as a primary source for tourists" and, according to its Chief Operating Officer, Berthold Trenkel, the "opening is a testament to the decades-long

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<sup>27</sup> Parisa Hafezi and Andrew Mills, "Iran, U.S. to Hold Indirect Talks in Doha on Tuesday -IRNA", in *Reuters*, 27 June 2022, <https://www.reuters.com/world/middle-east/qatar-host-indirect-talks-between-iran-us-reviving-2015-nuclear-deal-2022-06-27>.

<sup>28</sup> Qatar Ministry of Commerce and Industry, *H.E. Minister of Commerce and Industry: "Qatar Is Keen to Consolidate Its Economic Openness and Strengthen Cooperation with Its Trade Partners Worldwide"*, 6 June 2022, <https://www.moci.gov.qa/?p=22481>.

cultural and trade ties between the two countries”.<sup>29</sup> Raisi also proposed the establishment of an Iran Trade Centre in Qatar to showcase Iran’s capabilities to Qatari businesspeople and investors.<sup>30</sup>

As Pradhan argues, Iran was the “primary beneficiary” of the blockade as the quartet’s policies had pushed Qatar “closer and closer to Iran”.<sup>31</sup> But in 2018, during the height of the blockade, Qatar imported only around 400 million dollars worth of goods from Iran due to US secondary sanctions. In 2022, the leaders pledged to increase the trade volume to 1 billion dollars annually – a fraction of the Iran-UAE trade.<sup>32</sup> There are, however, substantial engagements between the two countries. The shared possession of the world’s largest gas reserves in the Gulf presents significant opportunities for bilateral cooperation. If key economic sanctions on Iran are lifted, Qatar could significantly invest in Iranian infrastructure, including tolling and re-exporting Iranian gas as liquified natural gas (LNG) to Europe, Asia, and beyond. This cooperation is globally significant, particularly in light of the ongoing war in Ukraine and the challenges European energy markets face in securing resources for both the short and long term.

### *Oman-Iran*

Muscat has for a while been the go-to diplomatic gateway between Iran, the United States, and the GCC states. Oman has played an active role in shuttle diplomacy over the nuclear issue, release of European and American detainees held in Iran and helped, at times, to cool tensions in the Gulf. While the passing of Sultan Qaboos in 2020 meant that the region had lost its leading mediator, the Sultanate was quick to ensure the continuation of the approach. The new foreign minister, Badr bin Hamad

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<sup>29</sup> Qatar News Agency, “Qatar Tourism Opens Representative Office in Tehran”, in *Gulf Times*, 30 August 2022, <https://www.gulf-times.com/story/723453>.

<sup>30</sup> “President Raisi: Iran Ready to Set Up Trade Center in Qatar”, in *IRNA*, 21 February 2022, <https://en.irna.ir/news/84658453>.

<sup>31</sup> Prasanta Kumar Pradhan, “Qatar Crisis and the Deepening Regional Faultlines”, in *Strategic Analysis*, Vol. 42, No. 4 (2018), p. 437-442, DOI 10.1080/09700161.2018.1482620.

<sup>32</sup> “Qatar-Iran Aim to Raise Trade Volume to \$1Bn”, in *The Peninsula*, 27 February 2022, <https://s.thepeninsula.qa/nbgjsx>.

Al Busaidi, reiterated the Sultanate's "profound and enduring commitment" to resolving conflicts by peaceful means.<sup>33</sup> He argued that "if we are to avoid misunderstanding, we must maintain engagement and dialogue with everyone, so to have the best possible relations and mutual confidence with everyone".

During Hasan Rouhani's 2014 visit to Oman, the aim was to boost bilateral investments to 10 billion dollars, with Iran pledging 6 billion dollars for projects in Duqm, Sohar, and Salalah ports.<sup>34</sup> However, these plans have largely stalled due to renewed sanctions and financial challenges. As such, despite the potential, Iranian non-oil exports to Oman have hovered around 1 billion dollars annually in the recent past.<sup>35</sup> Raisi's visit to Oman in May 2022 and the resulting trade agreements underscore the significant potential for deepening Iran-Oman relations beyond their current trade levels. Raisi was accompanied by a 50-person delegation and aimed to overcome many barriers to expanding business-to-business ties between the two countries. Oman has eased several restrictions for Iranian businesses, including those related to visas, work permits, company registrations, and ownership.<sup>36</sup> In December 2023, the value of trade between Iran and Oman was targeted to reach 5 billion dollars after the potential signing of a preferential trade agreement.<sup>37</sup> During Raisi's visit to Muscat, talks continued on reviving the long-stalled 200-kilometre gas pipeline project from Iran to Oman and

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<sup>33</sup> IISS, *Speech by Sayyid Badr Bin Hamad Bin Hamoud Al Busaidi, Foreign Minister, Oman, at the 16th IISS Manama Dialogue*, 5 December 2020, <https://www.iiss.org/globalassets/media-library---content-migration/files/manama-dialogue/2020/ple-nary-transcripts/p2/sayyid-badr-bin-hamad-bin-hamoud-al-busaidi---as-delivered.pdf>. See also Giorgio Cafiero, "Oman's New Sultan and US-Iran Tensions", in *Iran-Source*, 23 January 2020, <https://www.atlanticcouncil.org/blogs/iransource/omans-new-sultan-and-us-iran-tensions>.

<sup>34</sup> "Iran's Rouhani in Oman to Boost Ties with Longtime Gulf Ally", in *The Jordan Times*, 12 March 2014, <https://jordantimes.com/node/249167>.

<sup>35</sup> "Raisi Calls Oman a 'Sincere and Reliable Friend'", in *Tehran Times*, 24 May 2022, <https://www.tehrantimes.com/news/472971>.

<sup>36</sup> "Trade with Oman in a Recovery Phase" (in Persian), in *Donya-e-Eqtesad*, 16 June 2022, <https://donya-e-eqtesad.com/fa/tiny/news-3873914>

<sup>37</sup> "Non-Oil Exports to Oman Reach \$916m in 10 Months", in *Tehran Times*, 6 March 2024, <https://www.tehrantimes.com/news/495813>.

developing the shared Hengam oil field near the Strait of Hormuz. Under the proposed plan, Iran would supply natural gas to Omani LNG export plants for international shipments and meet a portion of Oman's domestic natural gas needs.<sup>38</sup> This pipeline project exemplifies efforts toward regional economic integration.

### *4.3 Challenges facing the durability of diplomatic engagements in the Gulf*

Despite these constructive diplomatic shifts, there are hurdles facing the durability of these engagements. Particularly, the United States continues to impose a completely different vision for regional integration in the Middle East. Prior to his visit to Saudi Arabia and Israel in July 2022, Joe Biden highlighted the advantages of “a more secure and integrated Middle East”.<sup>39</sup> He underscored the significance of the region's waterways for global trade and supply chains and its energy resources in alleviating the impact of Russia's war on Ukraine on global energy supplies. Biden also pointed out that the region is “coming together through diplomacy and cooperation – rather than coming apart through conflict”.<sup>40</sup>

Despite this understanding, the US continues to follow an exclusionary approach in the Middle East, with its longstanding sanctions and containment policies posing significant obstacles to enhancing regional cooperation. The central consideration in Washington's approach towards the region is isolating and bypassing Iran in tandem to strengthening ties between Israel and the Arab states. Thus, the maximum pressure campaign was not reversed under Biden. But the Arab perceptions of the United States, Iran, and the global dynamics have changed, largely because of Trump's inactions in the face of the military threats in 2019, the unclear direction of US policies towards the Middle East, and the

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<sup>38</sup> “Iran to Revive Gas Pipeline Project to Oman, IRNA Reports”, in *Reuters*, 21 May 2022, <https://www.reuters.com/world/middle-east/iran-agrees-revive-gas-pipeline-project-oman-irna-2022-05-21>.

<sup>39</sup> Joe Biden, “Why I'm Going to Saudi Arabia”, in *The Washington Post*, 9 July 2022, <https://www.washingtonpost.com/opinions/2022/07/09/joe-biden-saudi-arabia-israel-visit>.

<sup>40</sup> *Ibid.*



realisation that the economic diversification agendas and ambitious development visions require a tranquil and cooperative environment in the region, inclusive of Iran.

The United States, under the Biden Administration, attempted to establish similar partnerships to MESA to finally form an Arab-Israeli NATO-like alliance. There was a meeting in Negev in March 2022, and another larger meeting took place in Sharm El Sheikh in June of that year, to discuss the Middle East Air Defence Alliance (MEAD) between Israel and a number of GCC and Arab states.<sup>41</sup> Discussions around MEAD date back to 2020 when the sole focus was on “countering possible missile attacks by Iran and its allies” by deploying Israeli early-warning radar systems across the Arabian Peninsula and synchronising regional air defence mechanisms.<sup>42</sup> By June 2020, Israel’s then-Defence Minister, Benny Gantz, had already confirmed that “this program is already operative and has already enabled the successful interception of Iranian attempts to attack Israel and other countries”.<sup>43</sup> Moreover, Israel has also been included in the US central Command area of responsibility since 2021. By April 2024, it was arguably this synchronised defence system that helped Israel neutralise many of the drones and missiles that were fired by Iran.

The Abraham Accords were largely motivated by drone and missile strikes from the Houthis, linked to Iran, and as part of a grand hedging strategy involving both regional and international considerations. The

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<sup>41</sup> The meeting in Negev included representatives from the US, Israel, the UAE, Bahrain, Egypt and Morocco. See Dov Lieber, Summer Said and Courtney McBride, “Israel, Arab Countries Pledge to Strengthen Ties After Summit”, in *The Wall Street Journal*, 28 March 2022, <https://www.wsj.com/articles/israel-arab-countries-pledge-to-strengthen-ties-after-summit-11648472142>. The meeting in Sharm El-Sheikh included representatives from the US, Israel, the UAE, Bahrain, Egypt, Jordan, Saudi Arabia and Qatar. See Bethan McKernan, “Israel and Saudi Arabia ‘in Talks over Joint Defence against Iran’”, in *The Guardian*, 27 June 2022, <https://www.theguardian.com/p/ym4bv>.

<sup>42</sup> Cinzia Bianco, Ellie Geranmayeh and Hugh Lovatt, “Bide and Seek: The Dangers of US Support for a Gulf-Israeli Defence Pact”, in *ECFR Commentaries*, 13 July 2022, <https://ecfr.eu/?p=94183>.

<sup>43</sup> Patrick Kingsley and Ronen Bergman, “Israel Confirms Regional Military Project, Showing Its Growing Role”, in *The New York Times*, 20 June 2022, <https://www.nytimes.com/2022/06/20/world/middleeast/israel-arab-military-alliance.html>.

UAE's approach to the Abraham Accords was as much economic as it was security-driven. For the UAE, who implemented a free trade agreement with Israel in April 2023, establishing economic ties and boosting trade with a new partner were paramount. Even though the UAE normalised relations with Israel, it did not stop Iran from continuing its diplomatic and economic partnership. But while Iran tolerated intelligence sharing between the UAE and Israel, any Israeli infrastructure aimed at striking Iran from UAE territory would likely provoke Iranian retaliation. It is for this reason that Gargash also downplayed the rekindled talks on an Arab NATO to form an anti-Iran alliance, saying it was only a "theoretical" concept.<sup>44</sup> Moreover, in the post-7 October regional dynamics, the UAE has been forced to significantly backtrack its overt engagements with Israel, largely due to the negative turn in domestic and regional public opinion as well as the logistical complexities in conducting trade during the war.

Even though the Saudi Crown Prince had said that "we do not view Israel as an enemy, but rather as a potential ally in the many interests that we can pursue together", this did not really translate as having a common enemy in Iran.<sup>45</sup> For Saudi Arabia, normalisation with Israel is about broadening its strategic reach, not necessarily to counter Iran. Even before the 2023 War in Gaza, the Saudis had "poured cold water over any imminent normalization with Israel", and the Saudi Foreign Minister had added that "Riyadh was not part of any discussions on a Gulf-Israeli defense alliance to counter Iran".<sup>46</sup> There is little doubt in the fact that both countries have deep threat perceptions about Iran, but while the methods and approaches to dealing with the Iranian challenge were similar in the past, there is a disconnect between Saudi Arabia and other GCC states' approach today in comparison to Israel.

Around the same time as the signing of the Iranian-Saudi Beijing Agreement in March 2023, reports emerged of an imminent US brokered

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<sup>44</sup> "UAE May Send Envoy to Iran, Dr Anwar Gargash Says", in *The National*, cit.

<sup>45</sup> Vivian Nereim, "Saudi Prince Says Israel Is a Potential Ally, Not an Enemy", cit.

<sup>46</sup> Jarrett Renshaw, "Biden Ends Trip with U.S.-Saudi Relations on the Mend but Few Other Wins", in *Reuters*, 16 July 2022, <https://www.reuters.com/world/middle-east/biden-ends-trip-with-us-saudi-relations-mend-few-other-wins-2022-07-16>.

agreement for the normalisation of ties between Saudi Arabia and Israel as well. The topic has become the centrepiece of the Biden Administration's Middle East policy, and is now directly tied to the Palestinian-Israeli conflict. There is no doubt that it is in the interest of the Saudis to have an enhanced security relationship with the United States, their longtime security guarantor and principal partner of choice. But when Saudi Arabia sought Iran's isolation in tandem to closer US-Israeli partnerships, this led to an uptick in security threats. On the contrary, at a time of diplomatic engagements with Tehran, Saudi Arabia virtually has no need to worry about possible military strikes inside its territory. The Kingdom is pursuing its foreign policy strategy by finding a right balance in its preference for US security and economic partnership, while dealing with the reality of an unfavourable US Congress, an emerging multipolar world, and the difficulties in achieving progress on ambitious economic diversification initiatives and large-scale projects through an overreliance on a single global power. Even if Saudi Arabia agrees to limit its engagements with China on defence and technology – a prerequisite for a US-Saudi compact –, the Saudis must find ways to keep Beijing interested in the Kingdom, not the least for its competition with Iran.

The post-7 October regional landscape has also brought the Gulf states and Iran closer in many levels. Today, Iran's bilateral trade ties are significantly expanding with the UAE, Oman and Qatar, while Kuwait and Saudi Arabia are slowly resuming interactions following the resumption of diplomatic relations. Bahrain has also indicated its desire to restore ties, evidenced by the country's official representation at Raisi's funeral ceremony. While the region is awaiting the fruit of the Iranian elections in July 2024 and the outcome of the US presidential elections in November 2024, they seem intent on continuing the diplomatic path, as it has proven effective and beneficial to all key players involved.

#### *4.4 Europe's role in supporting regional diplomacy in the Gulf*

In response to shifting US priorities and uncertainty around its actions and inactions, other global players including the Europeans, China, Russia, India, and Turkey have sought to assert their influence in the Gulf. The Beijing Agreement was signed at a time when the EU and US were showing an inability to decrease tensions in the region. The change in

the Chinese strategy from a passive economic-oriented approach to a mediator did not take place overnight. China, unlike Russia, has shown that it can play a constructive role on the global scene. China's Belt and Road Initiative (BRI) has incorporated almost the entire region in its infrastructure development and connectivity plans and tied the Gulf countries into long term projects. Like the European Union, which has established global instruments such as Global Europe, Global Gateway and the European Green Deal, China has its own Global Security Initiative and Global Development Initiative which complement the BRI. Moreover, China facilitated Iran, Saudi Arabia, and the UAE's membership into BRICS and added Iran as a full member of the Shanghai Cooperation Organisation. These multilateral initiatives led by the so-called Global South are providing new avenues for diplomacy and cooperation.

With the region signalling it is ready to move towards greater economic and political diplomacy, European countries and the EU are faced with a rare opening to support the initiatives underway in the region. European countries have taken a more inclusive approach than the United States in engaging countries of the region. In contrast to the US, the EU and its member states enjoy functional diplomatic relations with Iran, Iraq, and the GCC states. Nevertheless, Iran's involvement in Russia's war in Ukraine, the ongoing human rights violations following the Woman, Life, Freedom movement, and the significant influence of diaspora Iranians in opposing any agreement with Tehran, have all been contributing factors in virtually stopping any constructive diplomatic engagements by the EU with Iran.

But the current spat should not divert the focus away from the principal EU interest in peace and security in the Gulf. "Iran is central to security in the region", according to the European Union's Strategic Compass for Security and Defence.<sup>47</sup> This is both because of the threats it poses through its military capabilities or proxies, as well as its central geopolitical role in the region and beyond. Moreover, the Joint Communication on a Strategic Partnership with the Gulf highlights the EU's

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<sup>47</sup> EEAS, *A Strategic Compass for Security and Defence*, March 2022, p. 20, [https://www.eeas.europa.eu/node/410976\\_en](https://www.eeas.europa.eu/node/410976_en).

strong interest in deepening its engagement with the region, particularly in economic affairs. However, the document does not fully capture the stance of most European countries toward the Gulf, as it notably excludes Iran and Iraq. The document does suggest that “involvement of other key Gulf countries in the partnership may also be considered as relations develop and mature”,<sup>48</sup> implicitly referring to Iran and Iraq as the only other Gulf countries.

In a multilateral effort, nine European countries – Belgium, Denmark, France, Germany, Greece, Italy, the Netherlands, Norway and Portugal – have been taking part in the European Maritime Awareness in the Strait of Hormuz (EMASOH) initiative that was launched in January 2020. The aim was to establish an independent European mission without including the United States with the goal of stepping up regional engagement to protect European interests, safeguarding freedom of navigation, and ensuring the uninterrupted flow of energy resources. In addition, EMASOH aims to de-escalate tensions and enhance maritime safety cooperation. Based on these goals and mandates, Europeans should actively share maritime information and collaborate on incident prevention. This could include organising EU-led regional military exercises against piracy and trafficking, and establishing a joint de-confliction centre and early warning system. These initiatives are essential prerequisites for progressing discussions on regional cooperation in the other sectors.

The Europeans have also partnered with Washington, at times, to engage in broader development and strategic agendas. The India Middle East Europe Corridor (IMEC), is an example of a US-led development agenda that aims to rival China’s BRI. This corridor, however, is designed to bypass Iran. While there are now multiple other such corridors being used or designed, such exclusionary grand-scale projects are bound to increase tensions. Despite this, regional countries are involved in many other transit routes and have been testing out different ways in which they can increase efficiency in logistics. Turkey’s Development Road project, Russia’s North-South Corridor, and India’s North-South and Eastern corridors are examples. In addition, the first international road transport (TIR) intermodal operation from the UAE

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<sup>48</sup> European Commission and EEAS, *A Strategic Partnership with the Gulf*, cit., p. 1.

to Turkey via Iran took place in 2021, which reduced costs of transportation, and the journey was cut from 20 days to around a week.<sup>49</sup> In another example of how integrated transit and transportation links are in the region, Iran tested another corridor that would link Russia to India.<sup>50</sup> For trade between the GCC states, Iran, Iraq, and Europe, developing transit and transportation infrastructure should be a key goal.

There are also instances of more inclusive multilateral engagements with EU involvement. In August 2021, France played a crucial role in initiating the Baghdad Conference for Cooperation and Partnership, led by Iraq. This conference created a rare opportunity for countries that had not engaged in direct dialogue for years to come together. Leaders and foreign ministers from Iraq, Iran, Kuwait, Qatar, Saudi Arabia, the UAE, Egypt, Jordan, Turkey and France participated.<sup>51</sup> This gathering paved the way for a series of bilateral regional dialogues. The conference was held again and expanded in 2022 in Amman, Jordan. The Joint Communication cites the Baghdad Conference as an exemplary model of region-led processes involving the EU. The document expresses hopes for these efforts to evolve into a “structured EU-facilitated dialogue process”,<sup>52</sup> considering the Baghdad Conference and its subsequent EU-involved follow-ups as valuable templates for such initiatives. These engagements highlight that European governments and the EU have the necessary tools to engage more actively in the region, promoting regional economic cooperation, benefiting European companies and economies, and ensuring stability and security in the region. Even though this initiative has been paused, largely because of the conflict in Gaza and the European tensions with Tehran, it has become an established platform waiting to be rekindled.

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<sup>49</sup> “Turkey Opens Trade Route with UAE via Iran”, in *Middle East Monitor*, 4 November 2021, <https://www.middleeastmonitor.com/?p=507501>.

<sup>50</sup> Golnar Motevalli, “Iran Tests New Trade Corridor to Ship Russian Goods to India”, in *Bloomberg*, 12 June 2022, <https://www.bloomberg.com/news/articles/2022-06-12/iran-tests-new-trade-corridor-to-ship-russian-goods-to-india>.

<sup>51</sup> Mehran Haghirian, “Attendance in Baghdad Shows Iran’s Commitment to Regional Diplomacy”, in *B&BF Articles*, 31 August 2021, <https://www.bourseandbazaar.com/articles/2021/8/31/attendance-in-baghdad-shows-irans-commitment-to-regional-diplomacy>.

<sup>52</sup> European Commission and EEAS, *A Strategic Partnership with the Gulf*, cit., p. 9.

Overall, the region is more interconnected than it is perceived, and the shared problems facing the region require a common solution that is only achieved through cooperation. External support, particularly by the Europeans, could push the region towards realising these vast economic potentials. European stakeholders should support the development of an economic cooperation framework in the Gulf region. Enhanced economic cooperation among Gulf countries could directly benefit European stakeholders and contribute to regional stability by increasing the costs of future conflicts. European actors should explore ways to deepen economic linkages in the Gulf and determine how they can support regional initiatives when the political conditions permit and reflect on the concurrent impeding role of sanctions on Iran. Europe's significant economic presence and expertise in the Gulf position it strategically to enhance regional diplomacy and solidify its influence amid competition from global powers like China and Russia. By offering financing, technology, and technical assistance, European actors can play a crucial role in fostering multilateral economic cooperation among regional players. Although these tools are currently employed in bilateral contexts, the increasing shift towards multilateral diplomacy and economic integration provides a timely opportunity for the European Union to expand its economic diplomacy efforts regionally.

The EU Representative for the Gulf Region, Luigi Di Maio, is positioned well to advance these policy recommendations. Given the ultra-tense environment in the broader Middle East in the aftermath of the Israeli war in Gaza, European countries and the EU are now called on to take more proactive roles. In particular, the EU's image has severely deteriorated at both the public and state levels in the Gulf due to its overt support for Israel and inability to find a solution to the humanitarian catastrophe in Gaza. Using its existing capacities and tools, the Europeans could take on a more strategic, constructive, and inclusive approach towards the region.

#### *4.5 Conclusion*

While the prospects for resolving regional issues and conflicts seem promising, it is a lengthy process that has just been initiated. Cementing policies that ensure long-lasting tensions, economic sanctions and

embargoes, or an outright military conflict are not in the interest of any country in the region. Importantly, regional countries and key players are clear eyed that an isolated Iran will be the biggest threat to any initiative that seeks to bypass it. If Iran continues to be left out from regional scale development and infrastructural plans, the country will pose threats to the completion of any project in its vicinity. Today, regional countries are moving forward in their diplomatic tracks, and they seem intent on sprinting towards the ultimate goal of stability and regional cooperation. Only the United States, and by extension Israel, seem to be intent on inhibiting further progress and advancement of the constructive diplomatic shifts in the Gulf. The Europeans and the EU have an opportunity to play an effective role in supporting the positive developments in the region and actively engage with regional players in matters of multilateral economic diplomacy to serve their own interests but also help bring about peace and stability in the Gulf – a key stated goal.



## 5.

## Global Powers and the Wars of Narratives: China, Russia and the US Navigating Transitions in the Middle East and Africa

*Giulia Daga*

Recent events have shown more than ever how the Gulf, the Red Sea, the Mediterranean and the Sahel regions are not only economically but also politically interconnected. In a context of perceived increased multipolarity and multiple conflicts escalating along the three basins, it is increasingly necessary to address them holistically. Indeed, the increased centrality of the Red Sea makes the connection between the Gulf and the Horn of Africa indispensable, with the political and military developments on the two sides of the Bab El Mandeb strait often overlapping. Moreover, the division between the Gulf and the Sahel is becoming increasingly thin, with Gulf states increasing their political, military, and trade footprint in coordination or competition with traditionally great powers. For example, Iran is allegedly cooperating with Russia to gain access to uranium extraction in Niger, Qatar has played a mediation role in Chad, and Saudi Arabia and the United Arab Emirates (UAE) are playing a similar influential role in Sudan. Similarly, North Africa and the Sahel need to be considered together and connected to the Indian Ocean to better understand how global powers such as the US, Russia and China have crafted their strategies and adjusted their patterns of behaviour.

While the other chapters have tried to interpret the regional level, including regional actors' threat perceptions and subsequent alignment choices, this chapter zooms out to reflect on the ways in which global powers design their strategies and are challenged by competing global powers. Despite not aiming for comprehensiveness considering the breadth of the

topic, this chapter seeks to highlight how the most recent involvements of China, Russia and the US in the Gulf, North Africa and Sahel region have been presented by these actors in their official discourse. More specifically, the chapter seeks to assess how increasingly polarised competing narratives reflect the changing tenets of the international system, with underlying norms under continuous assault and regional actors increasingly able to choose their preferred external narratives and benefits that (seemingly) come with them. Finally, the chapter seeks to identify trends and implications that necessarily need to be considered in any European and Italian engagement with the regions, both discursively and concretely.

Looking at narratives is not just an aesthetic exercise. They shape policy preferences and at the same time are used to try to convince the public audience (domestic and international) of the validity of these preferences.<sup>1</sup> In international relations, reputational considerations about a potential partner affect leaders' decision-making,<sup>2</sup> and reputation is mostly built around consistency between narratives and action. In addressing the so-called Global South, the West is often considered to have already lost the battle of narratives to Russia and China,<sup>3</sup> with a strong reputational blow linked to accusations of double standards. And yet, countries from the South seem more interested in diversifying partners based on issue-based advantages, either from the US, Europe, Russia, or China, rather than choosing a permanent bloc to align with.<sup>4</sup> It is important to always keep this in mind when looking at how global powers try to present themselves in the Middle East and Africa.

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<sup>1</sup> Gilberto Capano, Maria Tullia Galanti and Giovanni Barbato, "When the Political Leader Is the Narrator: The Political and Policy Dimensions of Narratives", in *Policy Science*, Vol. 56, No. 2 (June 2023), p. 233-265, <https://doi.org/10.1007/s11077-023-09505-6>.

<sup>2</sup> Mark J.C. Crescenzi, *Of Friends and Foes. Reputation and Learning in International Relations*, Oxford, Oxford University Press, 2018, p. 58-84.

<sup>3</sup> Julien Barnes-Dacey and Jeremy Shapiro, "The West Should Give Up the Battle of Narratives", in *Foreign Policy*, 20 November 2023, <https://foreignpolicy.com/2023/11/20/west-global-south-narrative-rules-order>.

<sup>4</sup> Timothy Garton Ash, Ivan Krastev and Mark Leonard, "Living in an à la carte World: What European Policymakers Should Learn from Global Public Opinion", in *ECFR Policy Briefs*, 15 November 2023, <https://ecfr.eu/?p=114571>.

### 5.1 The People's Republic of China

It is widely acknowledged, when examining China's involvement from the Gulf to the Mediterranean and Africa, that the People's Republic of China (PRC) prioritises geo-economics over geopolitics. By leveraging the security umbrella provided by the United States, China has for years advanced its economic partnerships in line with its decade-long Belt and Road Initiative (BRI) (table 1).<sup>5</sup> This is evident in how China has established its relationships with countries on both shores of the Gulf and is particularly visible in its involvement in the construction and management of infrastructure and development projects in Africa.

**Table 1** | Countries that have signed MoUs to join the Chinese Belt and Road Initiative

Country	Region	Likely* date of signing an MoU
Algeria	Middle East & North Africa	10/07/2018
Bahrain	Middle East & North Africa	01/07/2018
Egypt	Middle East & North Africa	01/01/2016
Iran	Middle East & North Africa	01/11/2018
Iraq	Middle East & North Africa	01/12/2015
Jordan	Middle East & North Africa	02/12/2023
Kuwait	Middle East & North Africa	01/05/2018
Lebanon	Middle East & North Africa	01/09/2017
Libya	Middle East & North Africa	01/07/2018
Morocco	Middle East & North Africa	01/11/2017
Oman	Middle East & North Africa	01/05/2018
Qatar	Middle East & North Africa	01/01/2019
Saudi Arabia	Middle East & North Africa	01/08/2018
Syria	Middle East & North Africa	01/2022
Tunisia	Middle East & North Africa	01/07/2018
UAE	Middle East & North Africa	01/07/2018

<sup>5</sup> Amr Hamzawy, "The Potential Inroads and Pitfalls of China's Foray into Middle East Diplomacy", in *Carnegie Commentaries*, 20 March 2023, <https://carnegieendowment.org/posts/2023/03/the-potential-inroads-and-pitfalls-of-chinas-foray-into-middle-east-diplomacy>.

Yemen	Middle East & North Africa	01/11/2017
Cameroon	Sahel & Horn of Africa	01/08/2015
Chad	Sahel & Horn of Africa	01/09/2018
Djibouti	Sahel & Horn of Africa	01/09/2018
Eritrea	Sahel & Horn of Africa	25/11/2021
Ethiopia	Sahel & Horn of Africa	01/09/2018
Gambia	Sahel & Horn of Africa	01/09/2018
Guinea	Sahel & Horn of Africa	01/09/2018
Guinea-Bissau	Sahel & Horn of Africa	24/11/2021
Mali	Sahel & Horn of Africa	26/07/2019
Mauritania	Sahel & Horn of Africa	01/09/2018
Niger**	Sahel & Horn of Africa	N.A.
Nigeria	Sahel & Horn of Africa	01/09/2018
Senegal	Sahel & Horn of Africa	01/07/2018
Somalia	Sahel & Horn of Africa	01/08/2015
South Sudan	Sahel & Horn of Africa	01/09/2018
Sudan	Sahel & Horn of Africa	01/09/2018

*Notes:* \*As of December 2023, the availability of independent information on the signed MoUs was still limited, this is why the source has decided to use the term 'likely'. \*\*Niger has not published a confirmation of signing a full MoU for bilateral cooperation under the BRI.

*Source:* Author's elaboration of data from: Green Finance & Development Center website: *Countries of the Belt and Road Initiative*, <https://greenfdc.org/?p=575>.

Relations with Africa and the Middle East had already intensified in the 2010s, spurred by the 2008 financial crisis, which prompted so-called Global South states to increasingly diversify their economic partners beyond Europe and the US. Concurrently, China experienced substantial growth, averaging 9.5 per cent annual GDP growth during this period, thereby enhancing its attractiveness as an economic partner.<sup>6</sup>

China has based all its initiatives on the often-stated assumption of advocating for an “equal and orderly multipolar world and a univer-

<sup>6</sup> Adel Abdel Ghafar and Anna L. Jacobs, “Beijing Calling: Assessing China’s Growing Footprint in North Africa”, in *Brookings Policy Briefings*, September 2019, <https://www.brookings.edu/?p=609298>.

sally beneficial and inclusive economic globalization”,<sup>7</sup> exemplified not only by the Belt and Road Initiative, but also by other forums such as the Global Development Initiative, the Global Security Initiative and the Global Civilisation Initiative. By insisting on “equality” and “true multilateralism”, the PRC has been able to engage with governments that denounce Western double standards in various domains of cooperation. This stance is not new and has much to do with propaganda; yet, it has had tangible repercussions in the relationships China has built across the regions under analysis and has further reinforced China’s reputation over the past year. The accent on an “orderly” multipolar world is key to understand the interests of the current Chinese government. Indeed, in its competition with the United States, China claims to have no interest in creating further instability, as this would undermine the very partnerships in which the country has meticulously invested. Accordingly, the PRC presents itself as the most engaged and coherent supporter of peace, recently highlighting examples of its “constructive” role in advancing peace – despite with limited concrete results – in conflicts such as those in Gaza and Ukraine.<sup>8</sup>

### *China in the Gulf and the Middle East*

The Chinese geo-economic presence in the Middel East has for years closely resembled that of the US nearly a century ago, when US private companies benefited from the security umbrella provided by the United Kingdom to expand their economic presence without bearing the burden of ensuring the safety of trade and investments. In this process, China strongly emphasises the “win-win” and “equal” dimensions of the relationship, by building on and expanding the cooperation established a

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<sup>7</sup> Chinese Ministry of Foreign Affairs, *Working Together to Meet Challenges and Create a Better Future for Asia and the World*, Keynote Speech by Zhao Leji at the Opening Plenary of the Boao Forum for Asia Annual Conference 2024, 28 March 2024, [https://www.fmprc.gov.cn/eng/wjdt\\_665385/zyjh\\_665391/202403/t20240329\\_11273282.html](https://www.fmprc.gov.cn/eng/wjdt_665385/zyjh_665391/202403/t20240329_11273282.html).

<sup>8</sup> Chinese Ministry of Foreign Affairs, *A Staunch Force for Stability in a Turbulent World*, Keynote speech by Wang Yi at the 60th Munich Security Conference Conversation with China, 17 February 2024, [https://www.fmprc.gov.cn/eng/wjdt\\_665385/zyjh\\_665391/202402/t20240218\\_11246472.html](https://www.fmprc.gov.cn/eng/wjdt_665385/zyjh_665391/202402/t20240218_11246472.html).

decade ago through the Belt and Road Initiative, with Syria (2022) and Jordan (2023) among the latest signatories of BRI MoUs.<sup>9</sup> Trade relations between the PRC and the Arab world, particularly energy relation with the Gulf, are stronger than ever, with China emerging as the leading trade partner of the Gulf Cooperation Council (GCC) states,<sup>10</sup> Iran,<sup>11</sup> and among the top trade partners of Iraq.<sup>12</sup> The entrance of Saudi Arabia and the UAE into BRICS+ demonstrates a growing shift in trade interests and the development of financial collaboration with emerging markets in the so-called Global South.<sup>13</sup> Areas of cooperation have increasingly expanded beyond the hydrocarbon sector to include joint laboratories for innovation in several areas, including health, artificial intelligence, low-carbon development, agriculture and space. Another major area of cooperation regards financial joint efforts to provide loans that can support industrialisation and energy cooperation in the Middle East through a China-Arab interbank association.<sup>14</sup> The PRC government has, for some time now, however extended its activities beyond the purely economic domain, establishing military and political partnerships that may increasingly transform China's role in the region. In the military field, China has a long history of cooperation with Iran, sometimes in tandem with Russia,<sup>15</sup> while it has recently increasingly approached the

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<sup>9</sup> Christoph Nedopil, "Countries of the Belt and Road Initiative", cit.

<sup>10</sup> European Commission DG website: *Gulf Region*, [https://policy.trade.ec.europa.eu/node/706\\_en](https://policy.trade.ec.europa.eu/node/706_en).

<sup>11</sup> Observatory of Economic Complexity (OEC) website: *Iran*, <https://oec.world/en/profile/country/irn>.

<sup>12</sup> Observatory of Economic Complexity (OEC) website: *Iraq*, <https://oec.world/en/profile/country/irq>.

<sup>13</sup> Alexandre Kateb, "The GCC's Multipolar Pivot: From Shifting Trade Patterns to New Financial and Diplomatic Alliances", in *Carnegie Articles*, 28 May 2024, <https://carnegieendowment.org/research/2024/06/the-gccs-multipolar-pivot-from-shifting-trade-patterns-to-new-financial-and-diplomatic-alliances>

<sup>14</sup> Xi Jinping, *Further Deepening Cooperation and Moving Forward to Step up the Building of a China-Arab Community with a Shared Future*, Keynote Speech at the Opening Ceremony of the 10th Ministerial Conference of the China-Arab States Cooperation Forum, Beijing, 30 May 2024, [https://www.fmprc.gov.cn/eng/wjdt\\_665385/zyjh\\_665391/202405/t20240530\\_11314383.html](https://www.fmprc.gov.cn/eng/wjdt_665385/zyjh_665391/202405/t20240530_11314383.html).

<sup>15</sup> "Iran & China: Military Ties", in *The Iran Primer*, 28 June 2023, <https://iranprimer>.

Gulf monarchies, with the first combined China-UAE air force training exercise held in August 2023.<sup>16</sup> The military and economic strengthening of relations goes hand in hand with cultural, tourism and people-to-people cooperation, with initiatives such as the China-Arab Centre of Global Civilisation, and the China-Arab Research Centre on Reform and Development.<sup>17</sup>

The political evolving relationship, built on programmatic documents such as the “Arab friendship strategy” in 2004 and the “Arab Policy Chapter” in 2016,<sup>18</sup> has recently been described as “blossoming but still immature”.<sup>19</sup> Senior official-level forums have been organised since 2004 in the form of the China-Arab States Cooperation Forum (CASCF). Through this platform, the Chinese authorities have for two decades reiterated their Global South narrative, including support to the Palestinian question.<sup>20</sup> As part of this evolving process, the first China-GCC summit and the first China-Arab States summit were organised in Saudi Arabia in 2022, bringing together heads of state and government from the Arab League countries. Since then, multilateral summits have been repeatedly organised, in line with the Chinese insistence on multilateralism as a precondition for equal and fair relations.<sup>21</sup> The parallel building of relations with both the Arab

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usip.org/node/11886; “China, Iran and Russia Stage Joint Naval Drills in Gulf of Oman”, in *Al Jazeera*, 12 March 2024, <https://aje.io/og16f3>.

<sup>16</sup> “UAE-‘Falcon Shield 2023’ Exercises: Enhancing Strategic Defense Relations with China and U.S. Objections”, in *Tactical Report*, 17 August 2023, <https://www.tacticalreport.com/daily/62111>.

<sup>17</sup> Xi Jinping, *Further Deepening Cooperation*, cit.

<sup>18</sup> Anoushiravan Ehteshami, “China’s Foreign Policy towards the Mediterranean”, in *IEMed Mediterranean Yearbook 2023*, p. 23-29 at p. 27, <https://www.iemed.org/publication/chinas-foreign-policy-towards-the-mediterranean>.

<sup>19</sup> Camille Lons, “East Meets Middle: China’s Blossoming Relationship with Saudi Arabia and the UAE”, in *ECFR Policy Briefs*, May 2024, p. 1, <https://ecfr.eu/?p=122285>.

<sup>20</sup> Chinese Ministry of Foreign Affairs, *China-Arab States Cooperation Forum Holds the 19th Senior Officials’ Meeting and the 8th Senior Official Level Strategic Political Dialogue in Beijing*, 29 May 2024, [https://www.fmprc.gov.cn/mfa\\_eng/wjbxw/202405/t20240529\\_11313797.html](https://www.fmprc.gov.cn/mfa_eng/wjbxw/202405/t20240529_11313797.html).

<sup>21</sup> One of the most recent shows of multilateral engagement at the summit level was Donald Trump’s strong political investment in the Arab-Islamic-American Summit in Riyadh, in 2017. Hani Hazaimah, “Eliminating Terror Requires Unity, Says Trump in His-

states of the Gulf and Iran has allowed China to diversify economic partners while preparing the stage for a more active facilitation role between the two shores, with China's most notable and praised action in the political realm being hosting the final phase of reconciliation between Iran and Saudi Arabia in March 2023, marking a historic "English-free" mediation with very high reputational gains in the face of a minimum actual involvement in the negotiation, as most of the preparatory work done by the negotiating parties with the support of regional actors, notably Iraq and Oman.<sup>22</sup>

The decade-long PR campaign supporting China's economic and political penetration in the Middle East has received a significant boost since the onset of the war on Gaza in October 2023. China has taken a more critical stance towards Israel compared to previous conflicts or crises, leading the Israeli government to react by deepening – at least momentarily – its friendly contacts with Taiwan.<sup>23</sup> Chinese representatives have consistently and clearly called for an immediate ceasefire and have emphasised the necessity of recognising Palestinian statehood in accordance with international law. The Chinese authorities have also pledged substantial contributions for humanitarian assistance and post-conflict reconstruction, including a 3 million dollars donation to the United Nations Relief and Works Agency announced in late May 2024.<sup>24</sup> Moreover, China has utilised its "blossoming" communication channels with Arab, Iranian, Israeli and Turkish but also US and Russian leaders to find the fastest route to a ceasefire and de-escalation, including organising meetings to

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toric Address to the Muslim World", in *Arab News*, 22 May 2017, <https://www.arabnews.com/node/1102721>.

<sup>22</sup> Yasmine Farouk, "Riyadh's Motivations Behind the Saudi-Iran Deal", in *Carnegie Commentaries*, 30 March 2023, <https://carnegieendowment.org/posts/2023/03/riyadhs-motivations-behind-the-saudi-iran-deal>.

<sup>23</sup> Hongda Fan, "China-Israel Relations: Caught in a Downward Spiral", in *The Diplomat*, 24 May 2024, <https://thediplomat.com/2024/05/china-israel-relations-caught-in-a-downward-spiral>.

<sup>24</sup> Xi Jinping, *Further Deepening Cooperation*, cit.; Chinese Ministry of Foreign Affairs, *Position Paper of the People's Republic of China on Resolving the Palestinian-Israeli Conflict*, 30 November 2023, [https://www.mfa.gov.cn/eng/wjbxw/202311/t20231129\\_11189405.html](https://www.mfa.gov.cn/eng/wjbxw/202311/t20231129_11189405.html).



attempt reconciliation between Fatah and Hamas leaders.<sup>25</sup> However, like for the Saudi-Iranian rapprochement, also on Israel-Palestine the Chinese actions have not, as of June 2024, translated in practical diplomatic engagements that managed to have a substantial impact on negotiations. This clearly shows the timid Chinese attempt to become a more active geopolitical actor. Timid because the PRC lacks both the actual capacity – in terms of security-related bargaining chips to offer to the parties involved – and the willingness – in line with its non-interfering reputation that has provided much economic advantages until now – to pressure the warring parties towards the negotiation table. A similar pattern is visible in the Chinese approach towards the African continent.

### *China in North Africa and the Sahel*

In its efforts to connect China to Europe, the Belt and Road Initiative views the Mediterranean as a pivotal component. Since the onset of the Russian invasion of Ukraine, which expanded BRI land routes into Europe, the maritime routes through the Mediterranean have gained increased importance. Key nodes include Egypt and the Suez Canal Economic Zone, Morocco with its Tanger Med Port Complex, the Atlantic Free Zone and Casablanca Finance City. Additionally, submarine cable routes in the region play a crucial role, alongside the Central Asian route passing through Turkey.<sup>26</sup>

Initially strongly based on energy relations, also in this region cooperation has been fostered through investments that extend beyond the energy sector into areas such as the electronics, automotive and textile industries as well as digitalisation and transfer of technological know-how through the Digital Silk Road. All North African states are involved in the Belt and Road Initiative through MoUs, which has evolved in the case of Morocco into a Strategic Partnership, primarily focused on economic and cultural exchanges, and in the cases of longer-standing security allies Egypt and Algeria, into more structured Comprehensive Strategic Partnerships.<sup>27</sup>

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<sup>25</sup> Patrick Wintour, “China Angles for Gaza Mediation Role to Expand Influence in Middle East”, in *The Guardian*, 7 May 2024, <https://www.theguardian.com/p/qgffp>.

<sup>26</sup> Anoushiravan Ehteshami, “China’s Foreign Policy towards the Mediterranean”, cit.

<sup>27</sup> Ibid.

These collaborations are notably strong in port management and transportation infrastructures, positioning China as a significant economic partner and competitor to France, particularly in Algeria, despite the European Union remaining the largest trading partner for North Africa as a whole.

Beyond the Maghreb, Chinese authorities claim to have been instrumental in the construction of 100 ports across Africa since the beginning of the 21st century, alongside involvement in connectivity projects such as highways and railways.<sup>28</sup> Anticipating the structure of the BRI and subsequently linking both initiatives on the African continent, China initiated the Forum on China-Africa Cooperation already in 2000.<sup>29</sup> This strategy has aimed to establish a safe connection from the Gulf of Aden to the Gulf of Guinea, with Equatorial Guinea joining the BRI in 2019 through infrastructural projects. Establishing connectivity between East and West Africa would enable China to reach the Atlantic Ocean and northern Europe, bypassing the Mediterranean entirely, through multimodal transportation routes.<sup>30</sup> Moreover, in the landlocked countries of the Sahel region, China, along with Russia, has engaged in the lucrative arms trade and military modernisation efforts, including joint military exercises and training,<sup>31</sup> and securing access to natural resources, notably lithium.<sup>32</sup>

In its relations with African countries, China maintains a strong position as an exporting partner in the region but a comparatively smaller

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<sup>28</sup> “China Has Built 100 Seaports in Africa: Ambassador”, in *Hellenic Shipping News*, 11 November 2022, <https://www.hellenicshippingnews.com/china-has-built-100-sea-ports-in-africa-ambassador>; Liz Sly and Júlia Ledur, “China Has Acquired a Global Network of Strategically Vital Ports”, in *The Washington Post*, 6 November 2023, <https://www.washingtonpost.com/world/interactive/2023/china-ports-trade-military-navy>.

<sup>29</sup> Laura Rajosefa, “The Future of Strategic Competition in the Sahel Region: Placing Partnership First”, in *FAOA Journal of International Affairs*, 20 July 2023, <https://faoa-journal.substack.com/p/the-future-of-strategic-competition>.

<sup>30</sup> Giorgio Cuscito, “The Chaos in the Sahel Damages China”, in *Geopolitical Futures*, 23 October 2023, <https://geopoliticalfutures.com/the-chaos-in-the-sahel-damages-china>.

<sup>31</sup> Paul Nantulya, “China’s ‘Military Political Work’ and Professional Military Education in Africa”, in *Africa Center for Strategic Studies Spotlights*, 30 October 2023, <https://africacenter.org/?p=657337>.

<sup>32</sup> Economist, “China Is Winning Africa’s ‘White-Gold’ Rush for Lithium”, in *The Economist*, 9 November 2023, <https://www.economist.com/middle-east-and-africa/2023/11/09/china-is-winning-africas-white-gold-rush-for-lithium>.

importer. These trade imbalances highlight contradictions within China's professed policy of equal, win-win cooperation, which has been central to its discursive approach since the 1950s, when the PRC initially approached the continent through support to liberation movements. China's strategy often involves flooding North African markets with inexpensive manufactured goods that compete with local products, while primarily importing raw materials such as hydrocarbons and agricultural products. Additionally, China has faced accusations of engaging in corrupt practices and supporting authoritarian regimes, practices that parallel the often-contested Western approaches rather than presenting a genuine alternative.<sup>33</sup> Critics frequently accuse China of engaging in neocolonialism through investments that fail to generate significant local economic growth and by providing substantial loans that create debt dependencies. In addition, the Digital Silk Road has raised concerns over the transfer and control over surveillance systems that further reinforce authoritarian practices.<sup>34</sup> And yet, adherence to the principle of non-interference in African countries' disputes (such as the Libyan civil war or the question of Western Sahara) provides China with a better reputation than the European Union and the United States despite engaging in neocolonial economic practices.

In the realm of security, China has demonstrated a growing presence and involvement. Notably, China participated in a joint naval exercise with Russia in the Mediterranean in 2015, underscoring its expanding maritime interests beyond the Asia-Pacific region. Chinese warships made their first visit to Algeria in 2018, while both Algeria<sup>35</sup> and Egypt<sup>36</sup>

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<sup>33</sup> Tin Hinane El Kadi, "China in North Africa. From Revolutionary Politics to the New Silk Road", in *IEMed Mediterranean Yearbook 2023*, p. 17-22, <https://www.iemed.org/publication/china-in-north-africa-from-revolutionary-politics-to-the-new-silk-road>.

<sup>34</sup> Council on Foreign Relations (CFR): *Assessing China's Digital Silk Road Initiative. A Transformative Approach to Technology Financing or a Danger to Freedoms?*, December 2020, <https://www.cfr.org/china-digital-silk-road>.

<sup>35</sup> Pieter D. Wezeman et al, "Trends in International Arms Transfers, 2023", in *SIPRI Fact Sheets*, March 2024, <https://doi.org/10.55163/PBRP4239>.

<sup>36</sup> Associated Press, "Top Buyer Egypt Shops around at Its International Arms Fair", in *AP News*, 2 December 2021, <https://apnews.com/article/5e22cb19084cd696c6b5b4d26e89321f>.

have shown increasing interests in procuring arms from China in their diversification efforts.

In the Indian Ocean and Gulf of Aden, the Chinese People's Liberation Army Navy has conducted anti-piracy operations since 2008, parallel to European efforts aimed at ensuring freedom of navigation.<sup>37</sup> Accordingly, in 2017, China established its first overseas naval base in Djibouti, strategically positioned at the entrance to the Red Sea and near the Suez Canal, thereby facilitating its naval operations in the region. The Djibouti base places China in a position to compete for control over sea lanes connecting the Indian Ocean to the Mediterranean, both through Bab El Mandeb and Suez as well as via the longer but temporarily safer route around Africa.

It has been argued that China actively intervenes in conflict resolution only in cases where the risk of entanglement with other major powers is low and economic and security interests are high, such as in the Horn of Africa.<sup>38</sup> Conversely, the Sahel region, particularly Mali, is viewed as riskier for stronger Chinese political involvement. Indeed, the Sahel region involves a multitude of actors, primarily France, and more broadly, the EU, US and increasingly Russia, reflecting its complex geopolitical dynamics.

Similarly, amidst the escalating crisis in the Red Sea that prompted separate interventions by the US, UK and EU, China has remained cautious in balancing its principles under the BRI – i.e., reducing the risks of unintended attacks to Chinese ships and the indirect damages to international trade due to increased shipping freight rates, which have slightly affected also Chinese exporters<sup>39</sup> – with the principle of non-interference – China abstained at the UN Security Council on Resolution 2722, which condemned the Houthi attacks and encouraged

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<sup>37</sup> Alex Vines, Armida van Rij and Henry Tugendhat, "Is China Eyeing a Second Military Base in Africa as the US Struggles to Maintain One in Niger?", in *Chatham House Expert Comments*, 25 March 2024, <https://www.chathamhouse.org/node/34046>.

<sup>38</sup> Lina Benabdallah, "China's Conflict Resolution and Mediation Approach in Mali", in *China and Conflict Mediation Series*, 26 January 2024, <https://www.stimson.org/?p=90648>.

<sup>39</sup> FitchRatings, "Some Chinese Exporters Face Increased Costs due to Red Sea Crisis", in *Fitch Wire*, 6 March 2024, <https://www.fitchratings.com/research/corporate-finance/some-chinese-exporters-face-increased-costs-due-to-red-sea-crisis-06-03-2024>.

interventions in protection of freedom of navigation.<sup>40</sup> Similarly, in the Sahel, despite the region's significance as a trade corridor for China, the PRC government has shown limited reaction to the political and military turmoil following coups throughout the area, unlike its Russian counterpart.

## 5.2 The Russian Federation

The Russian foreign policy approach intertwines with that of China in their relations with the so-called Global South, which Russian authorities refer to as the "Global Majority".<sup>41</sup> This common bid for leadership places both countries as simultaneously inclined towards cooperation and competition. Since Russia's aggression towards Ukraine in 2022, the Russian discourse has adopted a notably more aggressive tone towards the US and its allies than China, denouncing perceived double standards and accusing them of seeking hegemony through "divide and rule as per the infamous colonial-era principle".<sup>42</sup> In contrast, Russia presents its own behaviour as consistent and based on principles of "equitable dialogue". The more pronounced anti-Western propaganda of Russia, in contrast to that of China, is also reflected in the establishment of the International Russophile Movement Congress. This congress held its second annual edition in February 2024, with Vladimir Putin explicitly stating its purpose as "countering the attempts of the collective West to isolate Russia internationally".<sup>43</sup>

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<sup>40</sup> UN Security Council, *Resolution 2722(2024)*, 10 January 2024, [https://undocs.org/S/RES/2722\(2024\)](https://undocs.org/S/RES/2722(2024)).

<sup>41</sup> Russian Ministry of Foreign Affairs, *Foreign Minister Sergey Lavrov's Remarks During a Meeting with Representatives of Parliamentary Foreign Affairs Committees from BRICS Countries*, Moscow, 11 April 2024, [https://mid.ru/en/press\\_service/minister\\_speeches/1943675](https://mid.ru/en/press_service/minister_speeches/1943675).

<sup>42</sup> Ibid.; but also Russian Ministry of Foreign Affairs, *Foreign Minister Sergey Lavrov's Remarks at the 'For the Freedom of Nations' Forum of Supporters of the Struggle Against Modern Practices of Neocolonialism*, Moscow, 16 February 2024, [https://mid.ru/en/press\\_service/minister\\_speeches/1932745](https://mid.ru/en/press_service/minister_speeches/1932745).

<sup>43</sup> Russian Ministry of Foreign Affairs, *Foreign Minister Sergey Lavrov's Remarks at the Opening Ceremony of the 2nd International Russophile Movement Congress*, Moscow, 27 February 2024, [https://mid.ru/en/press\\_service/minister\\_speeches/1935217](https://mid.ru/en/press_service/minister_speeches/1935217).

The Russian government has been using this discursive approach especially to garner international support for its occupation of Ukraine, as evidenced in one of Foreign Minister Lavrov's speeches to young Russian diplomats, stating that "none of the Western countries has made any honest proposals" to solve the war in Ukraine, whereas "African countries, Brazil, the Arab League, and China have put forward various ideas on security in Europe, ideas dictated by their best intentions".<sup>44</sup> This narrative explicitly seeks to portray a consensus among the so-called Global South in support of Russia, while depicting the US and Europe as enemies. This contrasts sharply with China's discourse, which aims to enhance cooperation with Europe despite maintaining working relations with Russia and fuelling the economic and strategic rivalry with the US.

Notwithstanding these differences, Russia and China keep strong partnerships, with Russian authorities calling this relation a "strategic tandem" that translates into cooperation in multilateral platforms, among which the UN Security Council, BRICS, Shanghai Cooperation Organisation, G20 and Asia-Pacific Economic Cooperation.<sup>45</sup> What makes the Russian anti-imperialist narrative less powerful than the Chinese one is that Russia's historical and present-day role as a colonial power has been increasingly more acknowledged and denounced.<sup>46</sup>

### *Russia in the Gulf and the MENA region*

In recent decades, the Middle East has regained centrality in Russian strategic considerations. Exploiting a context of reduced US engagement in the region, Russia has strengthened its alliances and expan-

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<sup>44</sup> Russian Ministry of Foreign Affairs, *Foreign Minister Sergey Lavrov's Answers to Questions during a Special Session of a Large MGIMO Discussion Programme Combined with the 7th Global Forum of Young Diplomats, Russia and Its Role in Shaping a Multipolar World*, Sochi, 4 March 2024, [https://mid.ru/en/press\\_service/minister\\_speeches/1936760](https://mid.ru/en/press_service/minister_speeches/1936760).

<sup>45</sup> Russian Ministry of Foreign Affairs, *Foreign Minister Sergey Lavrov's Video Address to the 9th International Conference Russia and China: Cooperation in a New Era*, 30 May 2024, [https://mid.ru/en/press\\_service/minister\\_speeches/1953685](https://mid.ru/en/press_service/minister_speeches/1953685).

<sup>46</sup> Nona Mikhelidze, "La guerra russa e la lotta anticoloniale degli ucraini" in *Affari Internazionali*, 24 February 2023, <https://www.affarinternazionali.it/?p=5249>.

ded its military long-term presence in the Mediterranean, with the expansion of the Russian military base in Tartus, Syria, as a prominent example.<sup>47</sup>

In the Gulf, unlike the US and China, which have steadily increased their cooperation with the Gulf monarchies since the 1970s, Russia's approach to the GCC countries, particularly Saudi Arabia, has been more complex. This complexity arises from Russian suspicions regarding Saudi support for separatists in the North Caucasus during the early 2000s and the Gulf monarchies' role against Russia's ally, Bashar al-Assad, in Syria after 2011.<sup>48</sup> In recent years, and despite some critical differences, the GCC countries, notably the UAE, have however sought increased relations with Russia in their diversifying efforts, by increasingly entering the Russian market through infrastructure and energy projects.<sup>49</sup>

Russian and GCC officials have engaged in strategic dialogue through a few forums, including the Russia-GCC ministerial meetings. Key shared principles emphasised in these institutional relations include non-interference, adherence to international law based on the UN Charter, respect for territorial integrity and sovereignty, and joint efforts against terrorism. More specifically, Russia has supported the UAE in its dispute with Iran over the Greater Tunb, Lesser Tunb and Abu Musa islands, and has collaborated with GCC countries on maritime security initiatives. Russia has moreover supported the GCC initiatives for reconciliation in Yemen and has condemned the "Houthi practices that contradict international efforts to resolve the crisis".<sup>50</sup>

From the Russian perspective, relations with both shores of the Gulf have proved essential both in the military and energy security

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<sup>47</sup> Sam Lagrone, "Russia, Syria Agree on Mediterranean Naval Base Expansion, Refit of Syrian Ships", in *USNI News*, 20 January 2027, <https://news.usni.org/?p=23336>.

<sup>48</sup> Dmitriy Frolovskiy, "Understanding Russia-GCC Relations", in Nicu Popescu and Stanislav Secieru (eds), "Russia's Return to the Middle East: Building Sandcastles?", in *Chaillot Papers*, No. 146 (July 2018), p. 83-93, <https://www.iss.europa.eu/node/2260>.

<sup>49</sup> Chiara Lovotti, "UAE Investments in Russia: A Testament to Growing Bilateral Ties", in *ISPI Publications*, 18 June 2024, <https://www.ispionline.it/en?p=177993>.

<sup>50</sup> Russia and GCC, *Joint Statement of the 6th Russia-GCC Joint Ministerial Meeting for Strategic Dialogue*, Moscow, 10 July 2023, [https://mid.ru/en/foreign\\_policy/rso/1896567](https://mid.ru/en/foreign_policy/rso/1896567).



domains, especially since the Russian invasion of Ukraine, which has prompted a partial recalibration of Russia's approach to the broader Middle East. There is now an increased emphasis on relying on regional players and diplomatic efforts rather than direct interventionism, to allow Russia to redirect resources towards the conflict in Ukraine. Despite open criticism from some countries such as Kuwait and Qatar,<sup>51</sup> and vocal support from others like Syria and Iran, most countries in the region – including Egypt, the UAE and Saudi Arabia – have maintained a stance of “positive neutrality”.<sup>52</sup> This approach has kept all channels of cooperation open, particularly in the arms and oil markets.<sup>53</sup> Indeed, since the invasion, both the Arab states of the Gulf and Iran have increased their engagements in technical military cooperation<sup>54</sup> and have cooperated through the OPEC+ platform to guarantee stable prices, despite the US's pressures on Saudi Arabia.<sup>55</sup> Not surprisingly, in December 2023, after months of abstaining from international forums due largely to a pending International Criminal Court arrest warrant against him, Vladimir Putin visited Saudi Arabia and the UAE, both of which do not recognise the court's jurisdiction.<sup>56</sup> Despite these shows of support in some of the GCC efforts to counter Iranian regional influence, Russia and Iran remain much stronger partners, supporting each other in by-passing sanctions, in protecting their common ally, Bashar al-Assad, in Syria, and recently

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<sup>51</sup> Giorgio Cafiero, “Two Years On, What Does the Ukraine War Mean for the Middle East”, in *The New Arab*, 5 March 2024, <https://www.newarab.com/analysis/two-years-what-ukraine-war-means-middle-east>.

<sup>52</sup> Rupal Mishra and Ankur Dixit, “Decoding Russia's Position in the Israel-Hamas Conflict”, in *Australian Outlook*, 9 February 2024, <https://www.internationalaffairs.org.au/australianoutlook/decoding-russias-position-in-the-israel-hamas-conflict>.

<sup>53</sup> Diana Galeeva, “Russia's Balancing Act across the Gulf”, in *Gulf International Forum Articles*, 12 October 2023, <https://wp.me/pCLqOB-8N9>.

<sup>54</sup> “Envoy: Russia, Saudi Step Up Military-Technical Cooperation”, in *Middle East Monitor*, 13 February 2023, <https://www.middleeastmonitor.com/?p=614628>.

<sup>55</sup> Kristian Coates Ulrichsen, Mark Finley and Jim Krane, “The OPEC+ Phenomenon of Saudi-Russian Cooperation and Implications for US-Saudi Relations”, in *Baker Institute Research Papers*, 18 October 2022, <https://doi.org/10.25613/0B0F-J592>.

<sup>56</sup> George Wright and Nadeem Shad, “Putin Makes Rare Foreign Trip to Gulf State”, in *BBC*, 7 December 2023, <https://www.bbc.com/news/world-europe-67636648>.



through the alleged Iranian direct military support to Russia in the war against Ukraine.<sup>57</sup>

According to Nikolay Kozhanov, Russia continues to view the Middle East through three overlapping objectives.<sup>58</sup> Firstly, it serves as an additional front in the conflict surrounding Ukraine, aimed at avoiding international isolation, diverting US attention and compelling US authorities to engage directly with Russia. Secondly, the region is considered a security theatre where alliances are built to mitigate ideological threats in the post-Soviet space, particularly in the North Caucasus. Lastly, the Middle East represents a crucial economic sphere where Russia seeks to attract investment, particularly from wealthy Gulf monarchies, while coordinating efforts to maintain high oil prices and establish trade channels that can bypass international sanctions.

The first objective has become particularly successful following the Israeli attacks on Gaza after 7 October 2023. At a time of increased disillusionment with the West, Russia has joined China in promoting dialogue and engaging with all parties involved, presenting themselves as constructively promoting peace despite “the US attempts to monopolise mediating efforts” and “repeatedly using its veto” against a cease-fire.<sup>59</sup> The war on Gaza has provided Russia with diplomatic ammunition for its anti-US propaganda, seeking to leverage the narrative of Western double standards and portray the so-called Global South as continually facing injustice. This approach serves to divert attention away from the war in Ukraine and Russia’s ongoing violations of international humanitarian law. In line with this, Russian authorities have increased contacts with Iran with the aim to promote Palestinian reconciliation. Representatives of Palestinian political parties, including Hamas, Palestinian Islamic Jihad and Fatah, were hosted in Moscow on

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<sup>57</sup> Emil Avdaliani, “Iran and Russia Enter a New Level of Military Cooperation”, in *Stimson Commentaries*, 6 March 2024, <https://www.stimson.org/?p=92023>.

<sup>58</sup> Nikolay Kozhanov, “Russian Relations with the Middle East After Putin’s Invasion of Ukraine”, in *ISPI Publications*, 11 September 2023, <https://www.ispionline.it/en?p=143131>.

<sup>59</sup> Russian Ministry of Foreign Affairs, *Foreign Minister Sergey Lavrov’s Opening Remarks during a Meeting with Representatives of Palestinian Political Parties*, Moscow, 29 February 2024, [https://mid.ru/en/press\\_service/minister\\_speeches/1935743](https://mid.ru/en/press_service/minister_speeches/1935743).

29 February 2024, with the stated goal of restoring unity within the Palestine Liberation Organisation.<sup>60</sup>

In the meantime, Russia's longstanding economic, cultural and political relations with Israel have taken a step back due to Israel's condemnation of the invasion of Ukraine<sup>61</sup> and Russia's refusal to designate Hamas as a terrorist organisation. Israel-Russia relations have been complex since the creation of Israel, with Soviet authorities initially preventing Jewish migration to Israel and supporting Palestinian factions. In the 1990s and 2000s, migration was liberalised, leading to increased ties between the two countries, especially nurtured since Vladimir Putin became President, with approximately 20 per cent of the Israeli population now speaking Russian.<sup>62</sup> However, the war in Ukraine has strained relations further, pushing Russia closer to Israel's archenemy, Iran. Despite this, Israel and Russia maintain strong ties in terms of trade partnerships, tourism and cultural exchanges, with Netanyahu having been frequently praised by the Putin administration.<sup>63</sup>

The increasingly overt anti-Israel stance taken by Russia since 7 October can be seen more as part of a broader propaganda campaign against the US and as a strategy to prevent any potential resurgence of anti-Russian sentiment in Dagestan and Chechnya. This approach is especially relevant as some Chechen fighter groups have joined Russia's military efforts against Ukraine.<sup>64</sup> Russia has been capitalising on the war on Gaza also to bolster its efforts in North Africa, turning diplomatic discontent towards the West into economic opportunities with Tunisia,

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<sup>60</sup> Ibid.; Chiara Lovotti, "Gaza War: What Does Russia Want?", in *ISPI Publications*, 28 February 2024, <https://www.ispionline.it/en?p=165278>.

<sup>61</sup> "Russia Moves to Dissolve Jewish Agency Branch that Promotes Immigration to Israel", in *Reuters*, 21 July 2022, <https://www.reuters.com/world/europe/russian-justice-ministry-asks-jewish-agency-be-dissolved-2022-07-21>.

<sup>62</sup> Fiona Hill and Kevin Huggard, "What Is Russia's Role in the Israel-Gaza Crisis", in *Brookings Commentaries*, 31 January 2024, <https://www.brookings.edu/?p=1757388>.

<sup>63</sup> Rupal Mishra and Ankur Dixit, "Decoding Russia's Position in the Israel-Hamas Conflict", cit.

<sup>64</sup> "Chechen Leader Says He Is Ready to Send Another 3,000 Fighters to Ukraine", in *Reuters*, 28 November 2023, <https://www.reuters.com/world/europe/chechen-leader-says-he-is-ready-send-another-3000-fighters-ukraine-2023-11-27>.

Morocco (which historically has stronger ties to the West than to Russia) and its longstanding partner Algeria.<sup>65</sup>

### *Russia in Africa*

More broadly across the African continent, Russia has capitalised on its Soviet-era reputation as a supporter of anticolonial liberation movements. This legacy has enabled Russia to forge strong ties with numerous countries, including Algeria, Angola, Egypt, Ethiopia, Libya and Mozambique. Initially interrupted after the dissolution of the USSR, these relationships were revived in the 2000s through bilateral agreements spanning military, economic and counterterrorism fields. Particularly since 2018, Russia has sought to fill what it perceives as a vacuum left by the US, strengthening its engagements across Africa. The Russian authorities never lose an occasion to remind their African counterparts of the era of friendship and shared anticolonialism. This process, often defined as “memory diplomacy”,<sup>66</sup> aims to make a connection between the past and today’s dynamics, especially in framing the Western approach as neo-colonial. The proposed argumentation is that even if “the Western methods have changed, [...] the thrust of its policy towards African countries has remained unchanged”.<sup>67</sup> Conversely, the Russian approach is consistently framed as grounded in principles of equality, as evidenced by the establishment of Russia-Africa summits in 2019, according to Russian rhetoric. This commitment to equality is underscored by the outcomes of the latest summit, notably the Russia-Africa Partnership Forum Action Plan 2023–2026.<sup>68</sup>

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<sup>65</sup> Sam Metz and Bouazza Ben Bouazza, “Russia’s Foreign Minister Tours North Africa as Anger toward the West Swells Across the Region”, in *AP News*, 21 December 2023, <https://apnews.com/article/c825c46f0177b6cef72db1343d4134ce>.

<sup>66</sup> Mariel Ferragamo, “Russia’s Growing Footprint in Africa”, in *CFR Backgrounders*, 28 December 2023, <https://www.cfr.org/node/250245>.

<sup>67</sup> Russian Ministry of Foreign Affairs, *Foreign Minister Sergey Lavrov’s Statement at a Reception on the Occasion of Africa Day*, Moscow, 23 May 2024, [https://mid.ru/en/press\\_service/minister\\_speeches/1952523](https://mid.ru/en/press_service/minister_speeches/1952523).

<sup>68</sup> Russian Ministry of Foreign Affairs, *Foreign Minister Sergey Lavrov’s Video Message to the Participants in the 3rd International Youth Forum Russia-Africa: What Next?*, Moscow, 24 April 2024, [https://mid.ru/en/press\\_service/minister\\_speeches/1946001](https://mid.ru/en/press_service/minister_speeches/1946001).

This narration has translated into many advantages for Russia, especially at the UN, where it has relied on political support from these countries on controversial issues, including attempts to annex portions of Ukraine.<sup>69</sup> Additionally, Russia has benefited from trade revenues derived from exports of grain, hydrocarbons and electronics. Mali has been a particularly significant focus of Russia's increased presence, involving both wheat trade and military cooperation.<sup>70</sup> Similarly, in Egypt, the Russian company Rosatom is working with Egypt to build the first nuclear plant in the country.

Despite increasing interest, Russia's economic footprint remains more limited compared to its Chinese, European and US counterparts. However, Russia has gained a relative advantage in providing private security, engaging in less regulated arms trade and offering military training services at competitive prices.<sup>71</sup> Russia has utilised private military companies to exert influence over the allocation of mining concessions in exchange for the provision of security services, thus generating revenue streams helping to circumvent sanctions.<sup>72</sup> The Wagner Group serves as the most infamous example, operating not only in Africa (mainly in Libya, Central African Republic and Sudan) but also in Ukraine (since 2014) and Syria (since 2015). As shown in Chapter 3, since 2021 Russia has expanded its influence by assuming positions previously held by France and the US in Mali, Burkina Faso and Niger,<sup>73</sup> seemingly with strong popular support.<sup>74</sup> The June

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<sup>69</sup> Mathieu Droin and Tina Dolbaia, "Russia Is Still Progressing in Africa. What's the Limit?", cit.

<sup>70</sup> Russian Ministry of Foreign Affairs, *Foreign Minister Sergey Lavrov's Remarks and Answers to Media Questions During a Joint News Conference with Minister of Foreign Affairs and International Cooperation of the Republic of Mali Abdoulaye Diop Following Their Talks*, Moscow, 28 February 2024, [https://mid.ru/en/press\\_service/minister\\_speeches/1935525](https://mid.ru/en/press_service/minister_speeches/1935525).

<sup>71</sup> Ibid.

<sup>72</sup> Laura Rajosefa, "The Future of Strategic Competition in the Sahel Region", cit.

<sup>73</sup> Paul Stronski, "Russia's Growing Footprint in Africa's Sahel Region", in *Carnegie Articles*, 28 February 2023, <https://carnegieendowment.org/research/2023/02/russias-growing-footprint-in-africas-sahel-region>.

<sup>74</sup> Eromo Egbejule, "More Control, Less Deniability: What Next for Russia in Africa after Wagner?", in *The Guardian*, 21 May 2024, <https://www.theguardian.com/p/qtee2>.

2023 showdown between Prigozhin and Putin, along with the death of Wagner's leader and the group's integration into the so-called "Africa Corps" under the Ministry of Defence, have provided continuity to Russia's military approach towards Africa.<sup>75</sup>

### 5.3 *The United States of America*

The United States has for quite a while now struggled with the need to reduce international engagement costs for its taxpayers, as this implies relinquishing its ability to intervene globally as it did during the bipolar and unipolar eras, and focus on core interests, primarily in South-East Asia.

Despite persistent accounts of its disengagement from the Middle East and Africa, the US remains the world leader regarding fleet deployment capabilities, naval bases and overall power projection across the regions under analysis. This is achieved through US Central Command and the 5th Fleet in the Indian Ocean, the Gulf and the Red Sea,<sup>76</sup> Africa Command and European Command<sup>77</sup> with the 6th Fleet operating in the Mediterranean. The defence system is bolstered by hundreds of military bases around the Mediterranean, the Red Sea and the Gulf, as well as near strategic chokepoints like the Strait of Bab El Mandeb (through the Djibouti base) and the Strait of Hormuz (through bases in the GCC states). Notwithstanding this military advantage, the perception of US supremacy has experienced fluctuations, with multiple actors competing to challenge its status as the sole superpower.

The rise of China as a major economic and military actor poses the main challenge for the US on a global scale. US Secretary of State Antony Blinken has however characterised the relationship with China as one of competition rather than hostility, with areas of cooperation where mutual

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<sup>75</sup> Nicodemus Minde, "Russia's Africa Corps: More than Old Wine in a New Bottle", in *ISS Today*, 7 March 2024, <https://issafrica.org/iss-today/russias-africa-corps-more-than-old-wine-in-a-new-bottle>.

<sup>76</sup> See the official websites of the US Central Command (<https://www.centcom.mil>) and US Naval Forces Central Command (<https://www.cusnc.navy.mil>).

<sup>77</sup> See the official websites of the US Africa Command (<https://www.africom.mil>) and US European Command (<https://www.eucom.mil>).

interests align. Russia, on the other side, is presented as a less threatening rival as regards its capacity to compete with the US at the global level.<sup>78</sup>

### *The US in the Gulf and the Middle East*

In the Gulf, the 1980 Carter Doctrine identified the region as of strategic interest, asserting the right to intervene directly if United States' interests were at risk. The US government reinforced alliances with the Gulf monarchies and designed interventions to safeguard these interests, particularly after designating the Islamic Republic of Iran and Saddam Hussein's Iraq as primary adversaries. Much has changed since the Carter Doctrine and its applications in the subsequent decades. The US is not as reliant on Gulf hydrocarbon resources as before, yet it continues to provide billions of dollars annually<sup>79</sup> to Gulf monarchies to enhance their military capabilities. Additionally, it has no intention of reducing the 5th Fleet or abandoning its naval bases across the Arabian Peninsula and in the Indian Ocean.

The 2011 support to the Arab uprisings, the reduced role in Iraq and the 2015 nuclear deal with the US led the Gulf monarchies to believe that they could not just rely on the US for their security concerns. Despite the Trump administration's shows of reassurance and full support to the Saudi regional endeavours, the US at the beginning of 2023 was still perceived as abandoning its Gulf allies, especially after the Biden administration's initial decision to remove the Houthis from the list of Specially Designated Terrorist Groups and the August 2021 withdrawal from Afghanistan.<sup>80</sup>

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<sup>78</sup> US Department of State, *Secretary Antony J. Blinken at McCain Institute's 2024 Sedona Forum Keynote Conversation with Senator Mitt Romney*, 3 May 2024, <https://www.state.gov/secretary-antony-j-blinken-at-mccain-institutes-2024-sedona-forum-keynote-conversation-with-senator-mitt-romney>.

<sup>79</sup> US Department of State, *United States-Saudi Arabia Relationship: Eight Decades of Partnership*, 6 June 2023, <https://www.state.gov/united-states-saudi-arabia-relationship-eight-decades-of-partnership>.

<sup>80</sup> Gerald M. Feierstein, Bilal Y. Saab and Karen E. Young, "US-Gulf Relations at the Crossroads: Time for a Recalibration", in *MEI Policy Memo*, April 2022, <https://www.mei.edu/node/84155>.

Across the Gulf, a shared perception has been present in the past few years that the US is shifting from being the “police of the Gulf”<sup>81</sup> to being a strategic security partner among others, including Russia and China. In the spring of 2023, some regional commentators suggested that the US should not worry about Gulf relations with China and should instead accept treating its Arab friends as equals, allowing them the freedom to maintain several partnerships, even with US rivals. This argument underlines how even Israel, the US’s main regional ally, was cultivating such diversified relationships, especially with China.<sup>82</sup>

The post-7 October Israeli attacks on Gaza have further reshuffled the geopolitical landscape, with Chinese and Russian narratives increasingly damaging the US’s reputation in both the Middle East and Africa. Moreover, the war on Gaza and its regional implications have brought some of the US’s core interests back to the forefront: securing sea lines of communication and maintaining strong security and trade relations with both its Israeli and Gulf partners.

To safeguard the first, the day after the 7 October attacks and in response to the subsequent Houthi attacks, the United States deployed naval assets in the Eastern Mediterranean,<sup>83</sup> sending two aircraft carriers and increasing the 6th Fleet’s presence. Additionally, the US launched Operation Prosperity Guardian in the Red Sea, in tandem with the UK. The rapidity of these interventions once more underscores how the US continues to position itself as the self-declared guarantor of security from the Mediterranean to the Gulf.

To safeguard the second, since the end of 2023 US authorities have been actively courting the Gulf monarchies, emphasising the strength

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<sup>81</sup> David Mack, “The Way for the US to Ensure Gulf Security Is Through Partnership, Not Policing”, in *MENASource*, 20 June 2023, <https://www.atlanticcouncil.org/?p=657047>.

<sup>82</sup> Sultan Bakarat and Lakshmi Venugopal Menon, “The US Should Not Worry About China-Gulf Relations”, in *Al Jazeera*, 9 April 2023, <https://aje.io/ofh5f4>.

<sup>83</sup> Derek Gatopoulos, “The U.S. Reshuffles Its Warships in the Mediterranean as Middle East Tensions Soar”, in *PBS News*, 19 January 2024, <https://www.pbs.org/newshour/politics/the-u-s-reshuffles-its-warships-in-the-mediterranean-as-middle-east-tensions-soar>; Associated Press, “US Aircraft Carrier to Remain in Mediterranean Near Israel, Officials Say”, in *VOA News*, 15 December 2023, <https://www.voanews.com/a/7400248.html>.



of their cooperation<sup>84</sup> and convincing their audiences of the wisdom and correctness of US actions, including the need to safeguard freedom of navigation from Houthi attacks in the Red Sea. Moreover, in May 2024, Secretary Blinken reiterated that normalisation between Israel and Saudi Arabia – contingent upon Palestinian political rights and the isolation of Iran – remains a priority for the US president.<sup>85</sup>

In the past few months, the US has increasingly called for a cease-fire and a peaceful resolution of the Palestinian question, including steps to further humanitarian aid to the civilian population in Gaza.<sup>86</sup> However, it has maintained its unhindered support for Israel's right to self-defence<sup>87</sup> and has strongly rejected the decisions of the International Criminal Court to announce arrest warrants for both Israeli and Hamas officials,<sup>88</sup> further undermining the US's already delicate reputation among the Arab population.<sup>89</sup>

### *The US in Africa*

Despite renewed interventionism in the Red Sea and Eastern Mediterranean, alongside a strong political commitment in the Middle East – initially in robust support of Israel and later shifting to lead negotiations

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<sup>84</sup> US Department of State, *Secretary Antony J. Blinken at a Meeting with Foreign Ministers of the Gulf Cooperation Council Member States*, 29 April 2024, <https://www.state.gov/secretary-antony-j-blinken-at-a-meeting-with-foreign-ministers-of-the-gulf-cooperation-council-member-states-2>.

<sup>85</sup> US Department of State, *Secretary Antony J. Blinken at McCain Institute's 2024 Sedona Forum*, cit.

<sup>86</sup> US Department of State, *The Appointment of Lise Grande as Special Envoy for Middle East Humanitarian Issues*, 25 April 2024, <https://www.state.gov/the-appointment-of-lise-grande-as-special-envoy-for-middle-east-humanitarian-issues>.

<sup>87</sup> US Department of State, *Secretary Antony J. Blinken with Christiane Baissary of Al Hadath*, 20 March 2024, <https://www.state.gov/secretary-antony-j-blinken-with-christiane-baissary-of-al-hadath>.

<sup>88</sup> US Department of State, *Warrant Applications by the International Criminal Court*, 20 May 2024, <https://www.state.gov/warrant-applications-by-the-international-criminal-court>.

<sup>89</sup> Munqith Dagher and Karl Kaltenthaler, "The United States Is Rapidly Losing Arab Hearts and Minds through Gaza War, While Competitors Benefit", in *Fikra Forum*, 21 November 2023, <https://www.washingtoninstitute.org/node/18498>.



towards a ceasefire – the perception of US retrenchment in the Sahel region remains evident. This perception has been particularly notable after a series of coups have affected the region since 2020.

Since 2002, the US has engaged with the Sahel strongly within the context of the “global war on terror”, launching the Pan-Sahel Initiative with Chad, Niger, Mauritania and Mali. The aim was to combat – and mostly prevent – the surge of terrorism in “weak” states by tracking movements of people and providing stability and cooperation through training and both military and civilian capacity-building. This initiative was intended to transform these countries into stable democratic institutions.<sup>90</sup> With the surge of Islamist groups operating across the borders of Algeria and Mali, including Al-Qaida in the Islamic Maghreb (AQIM, founded in 2007), and especially after the 2011 uprisings, the seven-month NATO operation in Libya<sup>91</sup> and the secessionist revolt in Mali in 2012, both the US and European actors (mainly France) shifted from aid and capacity-building to military interventionism.<sup>92</sup>

France deployed military troops in Mali, while the US increased its training presence in Niger through a military intervention to support the French operation, initially with around a hundred military personnel,<sup>93</sup> growing to about 800 troops by 2017 and nearly 1,000 by 2023. Additionally, the US established an air and drone base in Agadez.<sup>94</sup> The counterterrorism focus of the US presence in the Sahel was further emphasised with the creation of the Special Envoy for the Sahel Region of Africa in 2020, whose main role is to maximise US diplomatic efforts

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<sup>90</sup> US Department of State, *Pan Sahel Initiative*, 7 November 2002, <https://2001-2009.state.gov/s/ct/rls/other/14987.htm>.

<sup>91</sup> Shadi Hamid, “Everyone Says the Libya Intervention Was a Failure. They’re Wrong”, in *Brookings Commentaries*, 12 April 2016, <https://www.brookings.edu/?p=96184>.

<sup>92</sup> Laura Berlingozzi and Edoardo Baldaro, “In the Sahel, 20 Years of War on Terror Has Created More and Stronger Enemies”, in *ISPI Publications*, 10 September 2021, <https://www.ispionline.it/en/?p=56149>.

<sup>93</sup> Matt Williams, “US Troops Sent to Niger to Bolster Military Presence in West Africa”, in *The Guardian*, 22 February 2013, <https://www.theguardian.com/p/3e2bq>.

<sup>94</sup> Andrew Lebovich, “The Real Reason U.S. Troops Are in Niger”, in *Foreign Policy*, 27 October 2017, <https://foreignpolicy.com/2017/10/27/the-real-reason-u-s-troops-are-in-niger>.

to address the threat of violent extremist organisations.<sup>95</sup> In addition to countering extremism, the US presence in Niger guaranteed close vigilance over the country's large uranium reserves. For a few decades, the US has maintained a presence in the Sahel through investments, natural resource extraction and military cooperation. Unlike China and Russia, the US places a strong emphasis on promoting democratic governance, which the ruling juntas often perceive as a limiting factor to further relations.<sup>96</sup>

Less than one year after a military junta took power in Niger through a coup in July 2023, the Nigerien authorities have decided to end any military cooperation with the US,<sup>97</sup> as they had previously done with the French, who had also been expelled from Mali and Burkina Faso. The trigger for the Nigerien junta's decision, announced in March 2024, appears to intertwine political and security dynamics between Africa and the Middle East. Senior US officials claim that the crisis began from their denunciation of a secret negotiation between Niger and Iran for access to the country's vast uranium reserves, in addition to the US's repeated calls for a return to "a democratic path".<sup>98</sup>

While the junta has denied the existence of a deal with Iran, members of the post-coup administration visited Iran in January 2024. Both the then-President of Iran and the Speaker of the Niger Parliament have expressed appreciation for strengthening relations between the two countries<sup>99</sup> and both governments share an interest in bypassing inter-

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<sup>95</sup> US Department of State website: *Office of the Special Envoy for the Sahel Region of Africa*, <https://www.state.gov/bureaus-offices/under-secretary-for-political-affairs/bureau-of-african-affairs/office-of-the-special-envoy-for-the-sahel-region-of-africa>.

<sup>96</sup> Jeff Hawkins, "Withdrawal of US Troops from Niger: A Setback for Washington?", in *IRIS Analyses*, 26 April 2024, <https://www.iris-france.org/185945-withdrawal-of-us-troops-from-niger-a-setback-for-washington>.

<sup>97</sup> "Niger's Junta Revokes Military Agreement with US", in *BBC News*, 17 March 2024, <https://www.bbc.com/news/world-africa-68590531>.

<sup>98</sup> Michael R. Gordon et al., "Niger Termination of U.S. Military Ties Followed Accusation of Iran Uranium Deal", in *The Wall Street Journal*, 17 March 2024, <https://www.wsj.com/world/africa/niger-once-key-u-s-counterterrorism-ally-ends-military-ties-7db66dbe>.

<sup>99</sup> Iranian Presidency, *The Common Beliefs Iran and Niger Nations Bring Our Hearts Closer to Each Other*, 4 August 2021, <https://www.president.ir/en/130249>.

nationally imposed sanctions – from the West on Iran and from the Economic Community of West African States on Niger.<sup>100</sup> One month after withdrawing from Niger, the US was asked to remove its troops from Chad as well,<sup>101</sup> further reinforcing the impression that the US is “losing” the Sahel to Russia, whose military personnel have increased their presence, as shown in the previous section.<sup>102</sup>

If, on one side, the US is competing with Russia in the Sahel region for political and military partnerships, as well as for access to oil, gas and uranium,<sup>103</sup> the region has also become increasingly strategic as a source and corridor for critical minerals, as was shown in the chapter by Pier Paolo Raimondi. These minerals include lithium, cobalt and nickel, which are critical due to their essential role in the energy transition that the US and especially the EU are strongly investing in, and because their supply has been largely dominated by China. Critical minerals are particularly crucial for the US defence industry, and dependence on China for these materials became especially evident during the Covid-19 pandemic.<sup>104</sup> The US criticises China for steadily becoming dominant in these key industries through the acquisition of natural resources without respecting free market principles. As Secretary Blinken has recently put it:

The way that these investments have been made in many cases – not all cases, but in many cases – piling countries with debt, bringing in workers from China to take on the jobs instead of having local workers take them on, building things to substandards, bringing, shall we say, a disregard for workers and the environ-

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<sup>100</sup> Adam Lucente, “How Significant is Niger’s PM Visit to Iran Post-Coup and Amid Africa Push?” in *Al Monitor*, 25 January 2024, <https://www.al-monitor.com/node/62427>.

<sup>101</sup> Natasha Bertrand, “US Withdraws Troops from Base in Chad Following Government Demand”, in *CNN*, 1 May 2024, <https://edition.cnn.com/2024/05/01/politics/us-withdraws-troops-chad/index.html>.

<sup>102</sup> Charles A. Ray, “Is the United States Losing the Sahel?”, in *FPRI Analysis*, 7 May 2024, <https://www.fpri.org/?p=41081>.

<sup>103</sup> IEA, *Clean Energy Transitions in the Sahel*, September 2021, <https://www.iea.org/reports/clean-energy-transitions-in-the-sahel>.

<sup>104</sup> Thomas Sheehy, “Thomas Sheehy on U.S. Investment in Africa’s Critical Minerals Infrastructure”, in *USIP Podcast*, 22 February 2024, <https://www.usip.org/node/159021>.

ment with it – that also begins to have an effect. So I think countries appreciate the magnitude of the investment. They appreciate the rapidity with which China is able to act, something that is not our forte [...]. But then there is often a price to be paid later.<sup>105</sup>

The US is attempting to counter the Chinese dominating position through three interlinked processes: US investments (including bringing manufacturing back to the US); alignments with other countries (such as the Mineral Security Partnership and the Partnership for Global Investment and Infrastructure); and building independent supply chains to compete effectively with China.<sup>106</sup> Accordingly, the Biden administration has made increased efforts to involve US and European mining companies in the extraction of Africa's critical minerals and subsequent infrastructural investments. While the US efforts have been focused on Zambia, Zimbabwe<sup>107</sup> and the Democratic Republic of Congo, the Sahel remains considerably important for reserves and for transportation.<sup>108</sup> However, the US is entering the extraction and infrastructure investments field in Africa much later than China, which has for years built its networks throughout the continent, with the newly built US and European corridor projects often relying on existing BRI infrastructures.<sup>109</sup>

### *5.4 Implications for Europe*

Global powers have striven for control over sea lines of communication between Europe and Asia for centuries. The opening of the Suez Canal

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<sup>105</sup> US Department of State, *Secretary Antony J. Blinken at McCain Institute's 2024 Sedona Forum*, cit.

<sup>106</sup> Ibid.

<sup>107</sup> Sydney Boyo, "Is the U.S. Falling behind China in Africa's Lithium Industry?", in *CNBC*, 9 March 2023, <https://www.cnbc.com/2023/03/09/is-the-us-falling-behind-china-in-africas-lithium-industry-.html>.

<sup>108</sup> Critical Minerals Fund, *Memorandum of Understanding Signed with Sahel Resources Ltd.*, 29 November 2023, <https://www.thecriticalmineralsfund.com/?p=3069>; IEA, *Clean Energy Transitions in the Sahel*, cit.

<sup>109</sup> E.D. Wala Chabala, "Lobito Corridor: A Reality Check", in *APRI Short Analyses*, 2 February 2024, <https://afripoli.org/lobito-corridor-a-reality-check>. See also the official website: <https://www.lobitocorridor.org>.

and the discovery of hydrocarbon fields in the Middle East between the mid-19th and early 20th centuries revolutionised the way in which external players have approached the Gulf, the Red Sea and the Eastern Mediterranean. The British empire played this game longer than others, until the US replaced it in becoming the *de facto* security guarantor of Western interests. US naval supremacy (in terms of fleet deployment and naval bases) did not mean absence of competitors, with Russia and China balancing the US presence mostly in the economic and strategic partnership relations, while less so in the military field (with the Russians however much more involved than the Chinese in that sense).

Today, access to natural resources, trade, debts and other sources of revenue are guiding old and new external actors in a game that has little to do with “equality” and “fairness” despite the discursive emphasis put on them. Moreover, the fact that additional actors that see themselves as emerging powers in the so-called Global South, such as the Gulf states, are joining the US, Russia, China and other traditional great powers, does not make the new “scramble for Africa” any more equal.<sup>110</sup> What is clear is that several authoritarian countries in Africa and Asia are showing preferential treatment to external actors that come with no strings attached, especially in the spheres of human rights, democracy and rule of law.

The EU, as well as Italy, should be fully aware of both regional and global dynamics when devising strategies towards these areas, and decide how to position themselves in a context of increasing polarised great power competition. Europe can choose to side with its US ally in all its endeavours from the African continent to the Gulf, or to selectively cooperate with multiple partners based on project-based objectives. While relations between Europe and Russia are inevitably dictated by the evolution of the war on Ukraine, the EU position vis-à-vis the US-China competition is more nuanced. In the Chinese official narrative, Europe has a central and complementary role as, in the words of the PRC Ministry of Foreign Affairs Wang Yi, “China and

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<sup>110</sup> Olumba E. Ezenwa and John Sunday Ojo, “Russia Has Tightened Its Hold over the Sahel Region and Now It’s Looking to Africa’s West Coast”, in *The Conversation*, 29 April 2024, <https://theconversation.com/russia-has-tightened-its-hold-over-the-sahel-region-and-now-its-looking-to-africas-west-coast-228035>.

Europe are the world's two major forces, markets and civilisations"<sup>111</sup> and should see each other as partners instead of rivals. China sees Europe as a counterweight to US world influence.<sup>112</sup> At the same time, the US sees European allies as a counterweight to China, especially in their African endeavours.<sup>113</sup> In parallel, the EU defines China as "a partner for cooperation, an economic competitor and a systemic rival".<sup>114</sup> A clear understanding of how to translate these terms in each of the areas under analysis – the Gulf, the Middle East, North Africa and the Sahel – is something that the EU needs to seriously engage with, especially in view of a potential administration change in the White House after the November 2024 presidential elections.

Moreover, both Russia and China are seemingly winning the narrative war in using the anti-colonial discourse to weaken the Western reputation in the so-called Global South. Increased emphasis on changing the narrative by denouncing the Russian and Chinese neo-colonial practices, both in Africa and in Asia, can provide important leverage in the EU's global relations, especially after the post-7 October increased reputational blow. Most importantly, discursive efforts to depict European approaches towards the regions in an equal-to-equal fashion, something that has become particularly central in the Italian narrative of relations with African countries,<sup>115</sup> but also in the language used by the EU representatives, need to be consistent and coherently applied to all partner countries, especially when engaging with the concept of neo-colonialism. Otherwise, accusations of using double standards will inevitably further hamper European relations with the so-called Global South, as it was evident in the way European countries framed Israel's behaviour in the post-7 October military offensive.

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<sup>111</sup> Chinese Ministry of Foreign Affairs, *A Staunch Force for Stability in a Turbulent World*, cit.

<sup>112</sup> Anoushiravan Ehteshami, "China's Foreign Policy towards the Mediterranean", cit.

<sup>113</sup> US Department of State, *Secretary Antony J. Blinken at McCain Institute's 2024 Sedona Forum*, cit.

<sup>114</sup> EEAS, *EU-China Relations Factsheet*, December 2023, [https://www.eeas.europa.eu/node/34728\\_en](https://www.eeas.europa.eu/node/34728_en).

<sup>115</sup> "Italia-Africa, Meloni 'unnuovo approccio con il Piano Mattei'", in *AGI*, 15 March 2024, <https://www.agi.it/politica/news/2024-03-15/piano-mattei-italia-africa-premier-meloni-alla-prima-riunione-cabina-regia-25727849>.

## 6.

## Conclusions: Italy in a Shifting Global Order

*Maria Luisa Fantappiè*

Despite being part of a relatively stable Europe, the Italian peninsula is neighbour to multiple active conflicts. In the East of the Mediterranean, Israel's war on Gaza endures and expands, potentially destabilising the Middle East with massive displacement of population and proliferation of proxy conflicts. Plans for post-war reconstruction for Gaza are still unclear and the absence of an effective governance plan for the strip multiplies risks for everyone – Israel included. Egypt fears displacement of Palestinian civilians amassed at the Rafah border crossing and infiltration of Hamas cells. Jordan is concerned that Israel's continued annexation of territories within the West Bank could instigate another wave of displacement of Palestinians and radicalise its youth. Both Egypt and Jordan are signatories of peace treaties with Israel, in 1979 and 1994 respectively, and are vulnerable to unprecedented pressure to revise, or even revoke, those treaties from within their societies and from other Arab states.

Conflict in Gaza has a direct impact on the stability of the Levant and beyond. The war has an amplifying effect in consolidating areas controlled by the Syrian regime as a smuggling node for fighters, weapons and drugs for the entire neighbourhood. It offers non-state actors aligned with the Islamic Republic of Iran – from Iraq's Shiite paramilitaries to the Houthis in Yemen – ideological capital and military resources to emerge as the uncontested rulers of their respective states. Most importantly, it multiplies the chances for Israel and Iran to engage in a direct war. Since April 2024, Jerusalem and Tehran have been on the brink of a direct conflict. Israel's latent conflict with Hezbollah risks escalating with each day that passes. Thousands have been displaced following continued exchange of fire at the Israel-Lebanon border. Alongside the humanitar-

ian catastrophe that is unfolding, trade and energy connectivity have been heavily impacted. Since December 2023, Houthi's attacks on commercial shipments in the Red Sea have slowed trade and ports activities across this Sea, the Suez Canal as well as the Mediterranean. Conflict is also reducing prospects for stepped-up energy and trade connections with this area, challenging (at least in the medium term) the feasibility of the East-Med pipeline or the IMEC trade corridor connecting India and Europe through the Gulf and Israel.

Italy has reason to be concerned as not a single country with a shore on the Mediterranean is currently spared from the impact of the Gaza crisis. At the heart of the problem is the contested regional order in the Levant. Italy and Europe can no longer rely on the United States to stabilise this area. For many years, America's vision of a regional order centred on Arab normalisation with Israel and Gulf-Israel increased defence cooperation against Iran. This vision failed to stabilise the area. As things stand at the time of writing, Saudi Arabia is reluctant to normalise relations with Israel absent strong security guarantees from the United States and Israeli concessions on Palestinian statehood. Moreover, America's attempt at isolating and pressuring Iran through sanctions has backfired, encouraging the Islamic Republic to boost military support to non-state actors to strengthen its deterrence. The tragic events of 7 October are the push-back from one of these state-actors, Hamas, against regional order that prioritised Israel-Gulf normalisation, overlooked the issue of Palestinian statehood and isolated the Islamic Republic of Iran.

Looking to the southern shores of the Mediterranean, Italy confronts another set of equally important challenges. Crises in North Africa and the Sahel have been mutually reinforcing. Throughout the last decade, Arab uprisings have unleashed a cascade of crises that have contributed to deterioration of security across the Sahel. Libya's descent into conflict has multiplied opportunities for smuggling of weapons, helping the proliferation of armed groups and the mobility of armed militants in the Sahel. Since 2020, this region has witnessed at least seven successive military coups that brought military elites into power and increased the insecurity of the local population.

Meanwhile, countries in North Africa are still grappling with the post-Arab spring transitions, the return or consolidation of authoritarianism,



deepening economic crisis and growing food insecurity caused by climate change. Tunisia is, in this regard, a case in point facing shrinking democratic freedoms, rising levels of youth unemployment and dysfunctional state institutions. The country has become a point of departure for Tunisian and African migrants fleeing conflict, insecurity and unemployment, trying to reach Europe through Italy's Lampedusa. Europe, and Italy in particular, are exposed to the multi-layered fragility of the southern shores of the Mediterranean from migration to proliferation of armed groups. Regional instability in the broader Sahel also poses a significant threat to Italy's energy security, given its decision to replace gas imports from Russia with imports from Algeria and Nigeria.

Italy is surrounded by countries that are vocally critical of the West, contest its vision of the global order and are ready to engage with China and Russia. It cannot sidestep this reality. Countries across the Mediterranean have also swiftly adapted to a shifting global order that is no longer dominated by the United States. In the Middle East, Gulf countries have stepped up relations with China and maintained ties with Russia – even after Moscow's invasion of Ukraine. That, despite the continued security dependency on the United States. Russia and China have signed military and economic partnerships with over 40 African countries, demonstrating a commitment to project global force and power in a region historically dominated by the West. Russia for instance has signalled its intention to step up its economic and security footprint in the Sahel by opening diplomatic representations in Niger, South Sudan and Sierra Leone. This will allow Russia to further expand its military reach and presence in the region including in countries like the Central African Republic, Libya and Sudan.

Geopolitical competition is unfolding alongside a battle of narratives. The United States' and Europe's vision of a global order regulated by international law, human rights and multilateral cooperation is increasingly being challenged by new and emerging powers like China and Russia. The current context of multiple and simultaneous global crises, including the climate and energy crisis, the Covid-19 pandemic, the Russia-Ukraine conflict and Israel's onslaught on Gaza, have brought to the fore underlying tensions in the international system, especially on the application of international law and universality of international norms

and values. While the West overwhelmingly condemned Russia's invasion of Ukraine over violation of international law, a year and a half later it refused to condemn Israel's war in Gaza, which clearly violated principles of international humanitarian law. Such contradictions legitimised criticisms levelled by China and Russia against the Western hypocrisy of selectively upholding principles of international law to promote narratives based on pragmatism, rather than on internationally binding principles. Russia and China on the other hand have strengthened their economic and political foothold across the southern and eastern shores of the Mediterranean especially by reviving historical connections linked to anti-colonial struggles in Africa. Despite their growing prominence, Russia's and China's vision for a new order has no defined principles and rules other than interest. In other words, while the United States-driven vision of the world order is decaying, a new one with new rules and principles has not emerged.

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Italy needs to develop a strategic vision to adapt to the shifting global order. While its foreign policy remains anchored on the post-1945 order as a founder of the European community and a member of the Atlantic Alliance, it cannot neglect the Mediterranean, which is seen as less of a priority by northern Europe and the United States but not by Russia and China.

Thus far, Italy has prioritised pragmatism over developing a strategic vision, addressing these multiple crises in its surroundings with isolated responses. In June 2023, it promoted a Europe-Tunisia memorandum of understanding seeking to contain numbers of arrivals from the Tunisian shores to Lampedusa. After October 2023, as the crisis in Gaza unfolded, it sent an Italy navy unit with hospital and medical staff on board and delivered humanitarian aid. In February 2024, it supported the establishment of a European maritime mission in the Red Sea to respond to the growing threat posed by Houthi attacks. Yet, many of these crises are inter-linked and require a more comprehensive strategic vision.

The Mattei Plan is an attempt at developing such a vision. It deploys an effective narrative on egalitarian diplomacy and shows Italy's ambition to become a bridge between the West and the South. Italy's Mattei Plan pro-

poses a new approach engaging African counterparts. In doing so, it has the merit of moving past a security-focused approach to the Sahel, largely led by France and the United States, which deepened pre-existing political tensions, multiplied security actors and helped discredit Europe and the West in this area. The Plan aspires at revamping Italy's diplomacy towards Africa through concrete projects in areas of common interest that could help moderate the growing polarisation between the West and the global South.

Yet the Plan risks being overly pragmatic, sidestepping the political intricacies of the difficult contexts in which it operates. While such agreements may deliver short-term gains, they also risk legitimising autocratic regimes, which can have profound implications for human rights, democracy, security and development within the host countries. Furthermore, this approach could diminish Europe's standing as a global champion of human rights and democracy. Overall, the Plan limits itself to promoting a convincing narrative, containing migration and advancing business interests, and has yet to design a broader strategy to strike a balance between the interests of Italy's traditional alliances in Europe and in the Atlantic Alliance and the pressure to diversify partnerships and adapt to the shifting global order coming from the south and east of the Mediterranean. This volume suggests that the Mattei Plan should go beyond transactional politics to:

- Develop an agenda that addresses the triple nexus of humanitarian, development and security challenges in the Sahel, and more broadly in Africa. This requires engaging with EU and European member states' policies in the continent and Africa's core initiatives for development (i.e., Comprehensive Africa Agricultural Development Programme, Programme for Infrastructure Development in Africa and the African Continental Free Trade Area); developing a strategy that does not shy away from dealing with the political intricacies affecting these countries such as the multiple armed non-state actors, unresolved intra-state conflict and geopolitical competition in the region; and favouring intra-African economic and political cooperation to de-escalate conflicts and support market integration.
- Target high-impact areas such as education, job creation and agriculture to leverage Italy-Africa cooperation. Concrete results

in these specific areas can be the cornerstone to incrementally build trust and credibility in North and sub-Saharan Africa. This is already part of the Mattei Plan and should be further advanced, in continued communication and dialogue with African counterparts. Italy and Europe should diversify their channels of engagement beyond leadership on power, and reach out to different sectors of the society: from directorates of public institutions to the private sector as well as universities and civic organisations. Broadening engagement would help Italy and Europe to ensure continuity of policy and projects even if faced with sudden political turmoil and, most importantly, to substantiate their commitment for a more egalitarian diplomacy with practical action.

- Develop an energy policy that strengthens Italy's and Europe's credibility in Africa. EU-Africa energy partnership can only grow with Europe working to reconcile Africa's economic needs with Europe's energy security needs and climate objectives. That starts with Europe enhancing Africa's energy access, favouring domestic use of African resources – including renewable energy – expanding industrial sectors and infrastructure, cooperating with gas-producing countries to address fugitive methane emissions, flaring and venting activities, and developing downstream and midstream activities on critical raw materials.

Turmoil in the Levant and the Middle East requires Italy and Europe to develop their own approach to regional order that could moderate and complement the one promoted by the United States. Steps in this direction outlined in this volume include:

- Promoting an inclusive vision of regional order in the Middle East. Italy and Europe should put dialogue at the heart of their strategy in the Levant, keep alive communication with Iran, promote the idea of an integrated Gulf and support synergies between Iran/Iraq and Gulf Cooperation Council countries. Furthermore, they should do so while also advancing Israel ties with the Arab world around their shared interest over a stable, efficiently governed post-war Gaza. Europe and specific member states can build on previous successes as mediators of the JCPOA agreement (2015)

and as facilitators of the two editions of the Baghdad Conference for Cooperation and Partnership (2021–2022). A dialogue-oriented approach is crucial to help supporting US diplomatic efforts in preventing a potential expansion of the Gaza conflict into Lebanon and in the broader region.

- Supporting regional energy and trade cooperation in the region. While energy and trade inter-connectivity cannot be drivers of peace and détente, they can help improve intra-state ties and political de-escalation when the political process is already in place. The volume outlines several practical opportunities that Europe can focus on in this field. Among them are increased cooperation among Gulf states on energy, minerals and water industries, which is especially important to address the shared problem of water scarcity; development of regional gas cooperation through shared fields; and cross-border electricity trading to enhance economic development and intra-regional trade, and to address the shared environmental challenges.



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Finito di stampare nel mese di settembre 2024  
presso la tipografia The Factory Srl  
per conto di "Nuova Cultura"  
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