

A NEW “**PIVOT** TO THE MAGHREB” OR “MORE OF THE **SAME**”?

The transformative shift of the Gulf
engagement in North Africa

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FOREWORD

For over a decade now, regime change in North Africa has created multiple windows of opportunity for the Gulf Cooperation Council (GCC) countries to reposition themselves in the region as major players capable of shifting dynamics. By all means, the GCC countries have been harnessing diplomatic support, financial resources, and even military means to pursue their regional policies.

To protect its geostrategic and economic interests, some GCC countries have tried to influence and interfere domestically in the politics of North African countries, creating different regional perspectives. In this context, the Regional Program Political Dialogue South Mediterranean of the Konrad Adenauer Stiftung published in early 2021 the findings of its public KAS PoDiMed Survey, which targeted among others Tunisia, Algeria, Libya and Morocco, and interviewed citizens about how they perceive foreign powers in their respective countries. The survey revealed the clear disparity between public opinion in the North African countries toward the role of some GCC member states in the target countries depending on how the Gulf is influencing the fragile and volatile transformation processes.

Against this backdrop, KAS PoDiMed publishes this study to shed light on the different interactions between internal and external factors to look at the strategic alignment of the GCC member states policy specifically in the Maghreb from various perspectives and dimensions: Maintaining political partnerships, military engagement, geostrategic interests, and economic diversification. This study strives to present the recent relevant developments and topic-related trends and provides forward-looking policy recommendations.

We would like to thank the author of the study, Dr. Sebastian Sons, for his valuable contribution and for the time and effort he put into it. The Konrad-Adenauer-Stiftung renews its commitment, through the Regional Program Political Dialogue South Mediterranean, to enable a free institutional environment for knowledge and expertise exchange and to promote political dialogue across the South Mediterranean region.

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EXECUTIVE SUMMARY

The outbreak of the “Arab uprisings” 10 years ago constituted a “Gulf moment” in the regional approach taken by Saudi Arabia, the UAE, and Qatar towards North Africa. They have emerged as veto players, spoilers, and transactional actors shaping and transforming the Maghreb in opposing directions. By using soft policy instruments, foreign aid, direct investments, business activities, political support, and security cooperation, the Gulf states aimed to protect their respective interests in North Africa. However, the “Gulf moment” did not lead to a Gulf monopoly in the Maghreb.

Since the “Arab uprisings”, all Gulf states have redefined and recalibrated their strategic approach towards North Africa: the Gulf states are undergoing a tremendous shift from traditional rentier states to post-oil economies, which will also have clear implications for Gulf–Maghreb relations. Traditional Gulf social contracts are on the brink – a process that has been pushed forwards due to a slump in oil prices and the outbreak of COVID-19 in 2020. In times of declining financial resources, the Gulf states will no longer provide the Maghreb with unlimited resources in terms of financial aid or development assistance but will strategically focus on sectors and regions of national interest.

Today, the UAE will most likely act in the most proactive, strategic and comprehensive way, driven by long-term maritime aspirations as well as security and economic considerations. In contrast, Saudi Arabia needs to focus more on its domestic affairs and its direct neighbourhood in order to resume its socioeconomic transformation, which has been hampered by the “double shock”, and to manage security threats related to the delicate situation in Yemen, Iraq, Lebanon, Egypt, Jordan, and the Red Sea, as well as the ongoing tensions with Iran. Qatar finds itself in the middle of both extremes: driven by economic interests, Doha still considers North Africa to be a potential market in terms of energy and infrastructure. However, Qatar recalibrated its foreign policy after the post-“Arab Spring” failure in Egypt and Tunisia.

As a hub between Asia, Africa and Europe and as a “springboard” to the Atlantic, the Maghreb acts as an interface and assumes a geostrategic and geopolitical hinge function for the Gulf states. In terms of logistics, energy, trade, and strategic infrastructure, Morocco or Algeria will remain of utmost relevance for Gulf states such as the UAE to expand their global trade and infrastructure network and consolidate their power as international maritime superpowers. Driven by a long-term agenda that is based on global aspirations, the UAE will therefore continue such an investment strategy in Northern Africa to consolidate its power presence in West Africa, Central Africa, and the Horn of Africa.

Regional destabilisation also shows implications for domestic insecurity on all levels. As all Maghreb states are facing tremendous internal cleavages, they decided to remain neutral during the Gulf rift (2017–2021). In doing so, the Maghreb states challenged the Gulf countries' self-perception as regional leaders and limited their influence as dominant actors in North Africa.

The Gulf states still consider the Maghreb to be a region with economic potential but in more strategic terms. For instance, as all Gulf states are fostering energy diversification and thus are promoting renewable and alternative energy such as solar and hydrogen, countries including Morocco, Tunisia, and even Algeria offer excellent options for closer partnerships with the Gulf in terms of green energy.

In recent years, Turkey emerged as the most relevant non-Arab regional player in the Maghreb, which also shows strong implications for Gulf states' engagement in the region. Libya serves as the main hotspot for the Turkish–UAE power struggle. Both countries' military engagement in Libya is driven not only by diverging ideological positions but also in terms of geostrategic relevance as a gateway to the Eastern Mediterranean.

Russia has developed as another ad hoc ally of the UAE and, to a lesser extent, Saudi Arabia. Libya serves as the most outstanding example of this strategic approach: here, the closest cooperation in the Maghreb exists between Russia and the UAE, with both establishing close ties with General Haftar in terms of security coordination. By establishing a Libyan military footprint together with Russia, Abu Dhabi considers Libya to be a gateway to North Africa, Western Africa, the Horn of Africa, the Indian Ocean, and the Red Sea.

From a Chinese perspective, both the Gulf states and the Maghreb are key economic and security partners. Interlinked with China's strategic cooperation with the Gulf states as part of the Belt and Road Initiative, North Africa offers China an excellent opportunity to further push its own economic, geostrategic and security interests. However, the Sino-Gulf interests in the Maghreb are not necessarily congruent, and also bear the risk of intensifying competition.

Today, North Africa has lost its supreme relevance as an ideological and political battleground for the Gulf states' aspiration for regional supremacy. Gulf–Maghreb ties will undergo significant adaptations based on national interests (rather than on loyalty, solidarity or ideology) in addressing several dimensions of strategic relevance.

LIST OF ABBREVIATIONS

ACG	Arab Cooperation Group
AFESD	Arab Fund for Economic and Social Development
AI	Artificial Intelligence
AKP	Adalet ve Kalkınma Partisi
ALDEC	Agence Algérienne de Coopération Internationale pour la Solidarité et le Développement
AMCI	Agence Marocaine de Coopération Internationale
API	Arab Peace Initiative
ASICOM	Algerian Saudi Investment Company
ATCT	Agence Tunisienne de Coopération Technique
AU	African Union
BRI	Belt and Road Initiative
CASCF	China–Arab States Cooperation Forum
CPEC	China–Pakistan Economic Corridor
CSP	Comprehensive strategic partnership
DP World	Dubai Port World
EEZ	Economic Exclusive Zone
EMGF	East Mediterranean Gas Forum
FDI	Foreign direct investment
FOCAC	Forum on China–Africa Cooperation
FTA	Free trade agreement
FY	Fiscal year
GCC	Gulf Cooperation Council
GDP	Gross domestic product
GNA	Government of National Accord
GNU	Government of National Unity

ICT	Information and communications technology
IMF	International Monetary Fund
IsDB	Islamic Development Bank
IUM	Islamic University of Medina
JCPDI	Jazan City for Primary and Downstream Industries
JCPoA	Joint Comprehensive Plan of Action
JDP	Justice and Development Party
KFAED	Kuwait Fund for Arab Economic Development
LAAF	Libyan Arab Armed Forces
LNG	Liquefied natural gas
LPA	Libyan Political Agreement
MbS	Muhammad bin Salman
MbZ	Muhammad bin Zayed
MP	Member of parliament
ODA	Official development assistance
ODNI	Office of the Director of National Intelligence
OECD-DAC	Development Assistance Committee of the Organisation for Economic Co-operation and Development
OIC	Organisation of Islamic Cooperation
QAF	Qatar Armed Forces
QC	Qatar Charity
QFFD	Qatar Fund for Development
SP	Strategic Partnership
UAE	United Arab Emirates
VAT	Value-added Tax

INTRODUCTION

Today, the Maghreb is considered by global, regional and local actors to be a region of high geostrategic significance in terms of energy and maritime security and access to relevant markets such as Sub-Saharan and Western Africa, the Horn of Africa, or the Eastern Mediterranean. European countries, the US, Russia, China and Turkey, as well as the Arab Gulf states are engaged in a great game that is characterised by deep fault lines and diverging interests. European countries are deeply entrenched economically and politically in Northern African countries: France, for instance, serves as the main trade partner for former French colonies such as Morocco and Tunisia, and is also heavily engaged in Libya. For China, the Maghreb has emerged as an integral transit hub for its Belt and Road Initiative (BRI) linking Europe with Asia and Africa, which results in significant investments in all North African countries. As the US's role in the Maghreb has decreased in recent years, other international players such as Russia and Turkey have started to seek to fulfil this power vacuum. In short, the Maghreb constitutes a theatre for overlapping external power struggles driven by particular economic, security and political interests and by rising threat perceptions.

In such a complex network of cooperation and competition, of rivalry and rapprochement, and of divergence and dialogue, the Arab Gulf states have emerged as veto players, spoilers, and transactional actors shaping and transforming the Maghreb in opposing directions. Since the “Arab uprisings” 10 years ago, the engagement of the Arab Gulf states — mainly Saudi Arabia, the UAE, and Qatar — in the Maghreb countries of Libya, Tunisia, Algeria, and Morocco has been driven by diametral interests, ideological grievances, and rising power competition.¹ By using soft policy instruments, foreign aid, direct investments, business activities, political support, and security cooperation, all Gulf states aimed to protect their respective interests in North Africa.²

The Gulf's interest in the region will remain high in the future, mostly for geostrategic, security and economic reasons: the Maghreb has emerged as a geostrategic gateway to markets in West, East and Central Africa and beyond, and interlinks the Gulf states' direct neighbourhood with other regions of strategic relevance, such as Europe. Additionally, the Gulf states' engagement in the Horn of Africa (as one of the most relevant target regions in terms of regional, maritime and energy security³) could be facilitated via North African countries such as Libya. In terms of logistics, energy, trade, and strategic infrastructure, Morocco or Algeria will remain of utmost relevance for Gulf states to expand their global trade and infrastructure network and consolidate their power as international maritime superpowers. Such an approach holds specifically true for the UAE.

¹ *In this study, we focus mainly on those four Gulf states because they are, by far, the most engaged in the Maghreb in political, security and economic terms. However, the limited and minimal role of Kuwait and, to some extent, of Oman and Bahrain will be briefly discussed at the end of the paper.*

² *Anna L. Jacobs, Regional and Global Power Competition Deepens Fault Lines Across the Southern Mediterranean, Arab Gulf Institute in Washington, October 21, 2020, <https://agsiw.org/regional-and-global-power-competition-deepens-fault-lines-across-the-southern-mediterranean/>.*

³ *Will Todman, The Gulf Scramble for Africa: GCC states' foreign policy laboratory, CSIS Briefs, Center for Strategic and International Studies, November 20, 2018, <https://www.csis.org/analysis/gulf-scramble-africa-gcc-states-foreign-policy-laboratory>.*

However, while the Maghreb constituted the most relevant theatre for Gulf engagement in the direct aftermath of the “Arab uprisings”, priorities have shifted since then: today, North Africa has lost its supreme relevance as an ideological and political battleground for the Gulf states’ aspiration for regional supremacy.⁴ Although internal Gulf competition still plays out in North Africa, the official settlement of the Gulf crisis between Qatar on the one hand and Saudi Arabia, the UAE, Bahrain, and Egypt on the other hand in January 2021 will most likely reduce polarisation in Northern Africa to some extent, although the root causes of the conflict have not been solved.⁵

This research paper sheds light on the political, security and economic engagement of the Arab Gulf states in the Maghreb by taking those diverging networks of contested relationships into consideration. The paper thus argues that Gulf–Maghreb ties will undergo significant adaptations based on national interests (rather than on loyalty, solidarity or ideology) in addressing several dimensions of strategic relevance: starting with the domestic policy considerations with which the Gulf monarchies need to deal in times of socioeconomic challenges, ongoing regional destabilisation, and the negative implications of COVID-19, the study analyses the contemporary shifts and continuities in Gulf states’ engagement in North Africa by focusing on political, ideological and economic activities.

Secondly, the regional dimension will be discussed, which has been driven in recent years by the inner-Gulf competition and its implications for Gulf engagement in the Maghreb. Thirdly, the contested relationship with Turkey as a rising star in North Africa is analysed, followed by the widening engagement of China and Russia in the Maghreb and its implications for relations with the Gulf states. Furthermore, the paper explains why North Africa serves more than ever as a gateway to other regions of relevance, such as Western and Central Africa, the Horn of Africa, and the Atlantic. Against this backdrop, investments in strategic infrastructure such as pipelines, deep-sea ports, and energy facilities have become a key geostrategic instrument for Gulf states such as the UAE to expand their network as global maritime powers.

Based on such observations, future trends will be identified; we argue that the Maghreb will remain of less relevance in terms of bilateral economic, ideological and political partnerships, but will win even more significance as a geostrategic gateway. In times of declining financial resources, the Gulf states will no longer provide the Maghreb with unlimited resources in

⁴ Florence Gaub, *Both Ends of the Spectrum: GCC-Maghreb Relations*, The AGSIW Gulf Rising Series, Arab Gulf Institute in Washington, December 19, 2017, https://agsiw.org/wp-content/uploads/2017/12/Gaub_GCC-Maghreb_ONLINE-1.pdf.

⁵ Anna L. Jacobs, *Resolution of Gulf Rift Not Likely to Mend Fault Lines in North Africa*, Arab Gulf Institute in Washington, January 21, 2020, <https://agsiw.org/resolution-of-gulf-rift-not-likely-to-mend-fault-lines-in-north-africa/>.

terms of financial aid or development assistance, but will strategically focus on sectors and regions of national interest. In this regard, South–South cooperation between multilateral Arab donor organisations and North African implementing agencies could intensify in order to create a situation where both parties join forces, so as to improve regional integration in times of shrinking resources. Furthermore, not only will maritime and fossil energy infrastructure remain relevant, but so too investments in the fields of renewable energy and environmental protection, as all Gulf states portray themselves as “green regional champions”. In contrast, as Gulf countries such as Saudi Arabia promote their domestic tourism sectors, competition with North African tourist destinations such as Morocco and Tunisia could intensify. Finally, ideological rivalries have already lost significance in the Gulf states’ portfolio in the Maghreb. This trend is likely to continue, as Gulf states such as Saudi Arabia and Qatar are neither willing to provide, nor any longer capable of providing, Salafi or Islamist clients with financial and political incentives.

THE GULF STATES IN TRANSFORMATION: THE DOMESTIC DIMENSION

Most of the Gulf states find themselves in the delicate situation of dealing with a post-“Arab uprising” region characterised by new power centres, new stakeholders, a new generation of leadership, and the dire need to adapt to those new realities; although the Gulf states are neither a monolithic bloc nor a homogenous group of decision-makers, all of them focus on several main traditional interests based on three “Ps”: (1) preserving political stability, (2) preserving economic interests, and (3) preserving political legitimacy. Those pillars have come under severe pressure because of the fact that regional and domestic constitutions are in flux.

As all Gulf states have undergone a conflictual historical process of nation-building centred on the respective royal families that found themselves oftentimes in competition with internal and external rivals, they are mainly concerned about their own political survival. Therefore, political decision-making mostly aims to achieve power consolidation.⁶ In recent decades, the ruling families have portrayed themselves as guardians of social cohesion and have established a patronage system financed by rentier state revenues in order to co-opt relevant players from religion, trade and culture and repress and marginalise oppositional movements such as those involving Islamists. In Saudi Arabia, “segmented clientelism”⁷ has become part and parcel of the power-sharing nexus between the Al Saud and the administrative apparatus suffering from an over-bloated and inefficient public sector. In the UAE and Qatar, small decision-making circles around the respective leaders, their closest advisers, and their family members developed as the core of state politics in order to concentrate power and prevent internal contestation and fragmentation.⁸

However, the more that resources with which to preserve the rentier state system dwindle, the greater the occurrence of challenges to the legitimacy of the ruling families: following the “Arab uprisings”, and in times of declining oil prices,⁹ all Gulf states need to deal with this kind of dire situation, characterised by economic transformation and liberalisation combined with a rise in authoritarianism and nationalism. A new generation of leaders define their power in even more absolute terms than those of their predecessors, who were more willing to foster co-option based on the allocation of public services, free education, and healthcare. Such a power concen-

⁶ Michael Herb, *All in the Family: Absolutism, Revolution, and Democracy in the Middle Eastern Monarchies*, Albany 1999.

⁷ Steffen Hertog, *Princes, Brokers, and Bureaucrats: Oil and the State in Saudi Arabia*, London 2010.

⁸ Peter Salisbury, *Risk Perception and Appetite in UAE Foreign and National Security Policy*, Research Paper, Middle East and North Africa Programme, Chatham House, July 2020, <https://www.chathamhouse.org/sites/default/files/2020-07-01-risk-in-uae-salisbury.pdf>.

⁹ Laura El-Katiri, *Vulnerability, resilience, and reform: The GCC and the oil price crisis 2014-2016*, Columbia Center on Global Energy Policy, December 2016: pp. 1-31.

tration is characterised by the marginalisation of old and traditional veto players that have been replaced by younger and more ambitious stakeholders. In promoting hyper-nationalism, Gulf leaders such as Saudi Arabia's Crown Prince Muhammad bin Salman (MbS), the UAE's Crown Prince Muhammad bin Zayed (MbZ) or Qatar's Emir Tamim Al Thani have created common enemies and a siege mentality to close the ranks and files and consolidate their power.¹⁰

Nowadays, the times of the state as the absolute caretaker seem to be over; overreliance on fossil resources and labour migration, an underdeveloped private sector, and spreading corruption in the public sector, combined with rising unemployment and social frustration among the young populations in countries such as Saudi Arabia and Kuwait, have accelerated a hot debate surrounding the reconfiguration of the traditional social contract. Qatar and the UAE¹¹ have already developed their unique business models based on vibrant and liberal economies, authoritarian governance, and service delivery. Both states have emerged as hubs for international trade and business, as well as hosts of international tourists and of mega events in sports and entertainment (such as the FIFA World Cup 2022 and Formula 1 races).¹² As foreign investment and the diversification of revenues constitute key pillars of their respective business models, securing these investments as well as stabilising returns on investments are major concerns when it comes to consolidating their political power.¹³ This attitude is more a political necessity than a pure instrument of public diplomacy. The ruling families' political legacy and legitimacy rely on their serious commitment to entering the post-oil era and transforming traditional rentier state economies into knowledge-based industries driven by innovation, modernisation, and technical creativity. As a consequence, the Gulf states need to foster diversification by promoting alternative and renewable energy, maritime security, global trade, digitalisation, cybersecurity, and tourism in order to radically transform their traditional business models from their traditional character as oil- and gas-reliant rentier states.¹⁴

Thus, traditional Gulf social contracts are on the brink — a process that has been pushed forwards due to a slump in oil prices and the outbreak of COVID-19 in 2020.¹⁵ The so-called “double shock” undermines the diversification process in all Gulf states to a lesser or greater extent:

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- ¹⁰ Christopher Davidson, *From Sheikhs to Sultanism: Statecraft and Authority in Saudi Arabia and the UAE*, London 2021; Madawi al-Rasheed, *The Son King: Reform and Repression in Saudi Arabia*, London 2020.
- ¹¹ Peter Salisbury, *Risk Perception and Appetite in UAE Foreign and National Security Policy*, Research Paper, Middle East and North Africa Programme, Chatham House, July 2020, <https://www.chathamhouse.org/sites/default/files/2020-07-01-risk-in-uae-salisbury.pdf>.
- ¹² Simon Chadwick, *The Business of Sports in the Gulf Cooperation Council Member States*, in: Danyel Reiche and Tamir Sorek (eds.): *Sport, Politics, and Society in the Middle East*, Oxford 2019: pp. 183-204.
- ¹³ Sebastian Sons and Inken Wiese, *The Engagement of Arab Gulf States in Egypt and Tunisia since 2011: Rationale and Impact*, DGAP analyse, N9, October 2015 https://dgap.org/system/files/article_pdfs/2015-09g.pdf.
- ¹⁴ Cinzia Bianco and Sebastian Sons, *Domestic Economic Plans and Visions in the GCC and Opportunities for Cooperation with Europe*, in: Silvia Colombo and Adel Abdul Ghafar (eds.): *The European Union and the Gulf Cooperation Council: Towards a New Path*, London: Palgrave Macmillan (forthcoming); Mohammad Nurunnabi, *Transformation from an Oil-based Economy to a Knowledge-based Economy in Saudi Arabia: the Direction of Saudi Vision 2030*, in: *Journal of the Knowledge Economy*, no. 8 (March 2017): pp. 536-564.
- ¹⁵ Eman Alhussein, *The Coronavirus Redefines Responsibility in the Gulf*, Arab Gulf States Institute in Washington, March 25, 2020, <https://agsiw.org/the-coronavirus-redefines-responsibility-in-the-gulf/>.

- In **Saudi Arabia**, the “double shock” severely accelerated the economic downturn in 2020. The gross domestic product (GDP) contracted by 4.1% in comparison to 1.1% in 2019. The inflation rate increased to 3.4% from -1.2% due to the increase of value-added tax (VAT) from 5% to 15%. In addition, the fiscal deficit widened from 4.3% in 2019 to 11.3% of the GDP, and youth unemployment significantly increased.¹⁶ Important business sectors such as tourism have tremendously suffered from travel restrictions, supply chain disruptions, and lockdowns, which will also impact the future perspectives of young Saudi nationals with respect to starting their own businesses or engaging in the tourist sector.
- The **UAE** business model (based on high hydrocarbon revenues and well-diversified financial, tourism, and real estate sectors) was also hit seriously by the pandemic; the GDP declined by 6.3% in 2020 in comparison to 1.7% in 2019, while the inflation rate stood at -1.6% (-1.9% in 2019), and the fiscal balance widened from -1.0% in 2019 to -8.0% in 2020.¹⁷
- In **Kuwait**, GDP growth accounted for -5.4% and the inflation rate for 0.9% in 2020 in comparison to 0.4% and 1.1% (respectively) in 2019, whereas the fiscal deficit is expected to increase from 9.8% in fiscal year (FY) 19/20 to 26.2% in FY 20/21.¹⁸
- **Qatar** witnessed a negative growth of 3.2% in 2020 in comparison to 0.9% with an inflation rate of -2.6% (-0.9 in 2019), whereas the fiscal deficit changed from 1.0% in 2019 to -3.6% of the GDP.¹⁹

However, driven by a continuous recovery in global oil demand and rising oil prices,²⁰ as well as ongoing legislative and administrative reforms in most of the Gulf states to ease investment restrictions, and business opportunities designed to attract foreign direct investment (FDI), the International Monetary Fund (IMF) estimates the economic growth for 2022 in Kuwait to be 3.2%, in Qatar to be 3.6%, in Saudi Arabia to be 4.0%, and in the UAE to be 2.6%.²¹

Despite such positive forecasts, challenges in less diversified economies, such as Saudi Arabia and Kuwait, will remain high; despite its status as the largest economy in the Gulf region, the Kingdom still struggles with high youth unemployment, an underdeveloped private sector, and its shattered international reputation²² due to the killing of Saudi journalist Jamal Khashoggi and its involvement in the war in Yemen. Such events have hampered Saudi Arabia’s attempts to establish itself as a hub for international businesses and a relevant tourist destination.

¹⁶ <https://thedocs.worldbank.org/en/doc/cfe892579f0c3ec9f329e40f3a93c21d-0280012021/original/15-mpo-sm21-saudi-arabia-sau-kcm2.pdf>.

¹⁷ <https://thedocs.worldbank.org/en/doc/5bae5632e2d8425830fbf0bac721cce3-0280012021/original/17-mpo-sm21-united-arab-emirates-kcm3.pdf>.

¹⁸ <https://thedocs.worldbank.org/en/doc/c751b0ce882dc73be5ab72e3e0317212-0280012021/original/8-mpo-sm21-kuwait-kwt-kcm3.pdf>.

¹⁹ <https://thedocs.worldbank.org/en/doc/6853dd5c93a231b05c90c7a1fd7ac5b4-0280012021/original/14-mpo-sm21-qatar-qat-kcm4.pdf>.

²⁰ The price of Brent’s crude oil increased by almost 30% to US\$67 per barrel between December 2020 and April 2021.

²¹ <https://www.worldbank.org/en/country/gcc/publication/economic-update-april-2021>.

²² Sebastian Sons, *Auf Sand gebaut. Saudi-Arabien – Ein problematischer Verbündeter*, Berlin 2016.

Following the death of long-serving Emir Sabah al-Ahmad al-Jaber al-Sabah,²³ Kuwait finds itself in a complicated transitional period, facing rising obstacles such as the inefficient public sector, the political stalemate due to ongoing tensions between the government and the influential National Assembly, and an insufficient strategy with which to foster diversification.²⁴ Given the fact that Qatar and the UAE started to foster their socioeconomic and foreign policy diversification years ago,²⁵ both seem to be better prepared for the ongoing crisis. However, socioeconomic challenges will also remain high; large numbers of labour migrants and expatriates from Europe, Asia and Africa constitute the main bulk of the workforce,²⁶ which has accelerated a controversial discussion surrounding national identity, the nationalisation of job markets, super-alienation, and xenophobia.²⁷

Regional destabilisation also shows implications for domestic insecurity on all levels;²⁸ the political trajectory of all Gulf states has been shaped by various factors, including the rising rivalry with regional players such as Turkey and Iran, the internal rift between Saudi Arabia, the UAE, Bahrain, and Egypt on the one hand and Qatar on the other hand (initiated by the "blockading quartet" in June 2017 and only solved in January 2021), the military crises in Syria, Iraq, and Yemen, and the fundamental implications of climate change for regional living conditions. International power shifts pose further challenges for Gulf leaderships: as the US is retrenching from the Middle East and the US administration under President Joe Biden no longer provides Gulf states such as Saudi Arabia with a *carte blanche* (unlike his predecessor Donald Trump), the Gulf states are pursuing a significant diversification of their external partnerships. Their strategy of "pivot to Asia"²⁹ by establishing close ties with China or Russia in terms of security, economic and political cooperation characterises a fundamental shift from traditional partnerships with the US or Europe. Against this backdrop, all Gulf states need to readapt their foreign policy approaches in order to deal with new realities which directly affect their engagement in North Africa on a political, economic and cultural level.

²³ Kristin Smith Diwan, *Kuwait's Patient Statesman*, Arab Gulf Institute in Washington, September 29, 2020.

²⁴ Elana DeLozier, *Kuwait's Precarious Mediation Role May Be Imperiled by the Emir's Passing*, The Washington Institute for Near East Policy, October 5, 2020, <https://www.washingtoninstitute.org/policy-analysis/kuwaits-precocious-mediation-role-may-be-imperiled-emirs-passing>.

²⁵ Guido Steinberg, *Regional Power United Arab Emirates: Abu Dhabi Is No Longer Saudi Arabia's Junior Partner*, SWP Research Paper 2020/RP 10, German Institute for International and Security Affairs, July 2020, <https://www.swp-berlin.org/10.18449/2020RP10/>.

²⁶ Sebastian Sons, *Arbeitsmigration nach Saudi-Arabien und ihre Wahrnehmung in Pakistan: Akteur*innen und Strategien der öffentlichen Sichtbarmachung*, PhD thesis, Heidelberg 2020.

²⁷ Daniel Falk, *Migranten im Spiegel der arabischen Presse. Der Einwanderungsdiskurs der arabischen Golfstaaten am Beispiel der Vereinigten Arabischen Emirate*, PhD thesis, Leipzig 2016.

²⁸ Kristian Coates Ulrichsen (ed.), *The Changing Security Dynamics of the Persian Gulf*, London 2017.

²⁹ Narayanappa Janardhan (ed.), *The Arab Gulf's Pivot to Asia: From Transactional to Strategic Partnerships*, Berlin 2020.

THE MAGHREB AS A THEATRE FOR INNER-GULF CONTESTATION: THE REGIONAL DIMENSION

The outbreak of the so-called “Arab uprisings” 10 years ago constituted not only a watershed but also a “Gulf moment”³⁰ in the regional approach of Saudi Arabia, the UAE, and Qatar towards North Africa. This era not only offered changes but also posed high risks for the Gulf states: from 2011–2014, Qatar positioned itself as an alternative to the status quo powers of Saudi Arabia and the UAE in the region and, in particular, in North Africa, which became explicitly virulent in Qatar’s support for Islamists, such as the Ennahda party in Tunisia³¹ or Muhammad Mursi in Egypt. Under then-Emir Hamad bin Khalifa Al Thani (ruled 1995–2013), Qatar emerged as the main caretaker for both governments by providing financial assistance and boosting investments in Egypt and Tunisia. He and his closest adviser, i.e. Foreign and Prime Minister Hamad bin Jassim al Thani,³² considered the “Arab uprisings” to be a brilliant opportunity to gain more political, economic and ideological leverage in North Africa by portraying Qatar as the ideological counterweight to Saudi Arabia and the UAE.³³ Facilitated by Aljazeera, the Qatari satellite network that rapidly emerged as a mouthpiece for Qatari foreign policy interests, Doha portrayed itself as the unique promoter of Islamic democracy by aligning with the protest movements in Tunisia and Egypt.

In contrast, Saudi Arabia and the UAE found themselves in panic mode, worried about a potential Islamist spillover effect on their Gulf populations.³⁴ Thus, the Saudi and UAE engagement in North Africa in the direct aftermath of the “Arab uprisings” was dominated by the aim of counterbalancing the rise of Islamism on a regional and domestic level³⁵ in order to preserve their monarchical legitimacy: after Hosni Mubarak in Egypt and Zine el-Abidine Ben Ali

³⁰ <https://www.thenationalnews.com/uae/arab-gulf-moment-is-trend-here-to-stay-says-academic-1.417606>.

³¹ Youssef Cherif, *The Maghreb: A Battle Ground for the Intra-Sunni Cold War*, European Institute of the Mediterranean, June 2020, <https://www.iemed.org/publicacions-en/historic-de-publicacions/focus/165.-the-maghreb-a-battle-ground-for-the-intra-sunni-cold-war>.

³² Andreas Krieg, *Qatar: From Activism to Pragmatism*, Sadeq Institute, March 17, 2021, <https://www.sadeqinstitute.org/short-reads/qatar-libya>.

³³ Tareq Cherkaoui, *Qatar’s public diplomacy, international broadcasting, and the Gulf crisis*, in: *Rising Powers Quarterly* 2018, vol. 3, no. 3 (2018): pp. 127-149.

³⁴ Sebastian Sons and Inken Wiese, *The Engagement of Arab Gulf States in Egypt and Tunisia since 2011: Rationale and Impact*, DGAPanalyse Number 9, German Council on Foreign Relations, December 2015, https://dgap.org/system/files/article_pdfs/2015-09g.pdf.

³⁵ Courtney Freer, *The Changing Islamist Landscape of the Gulf Arab States*, Arab Gulf Institute in Washington, November 21, 2016, <https://agsiw.org/changing-islamist-landscape-gulf-arab-states/>.

in Tunisia were ousted and political movements such as the Ennahda party in Tunisia as well as the Muslim Brotherhood (*Ikhwan*) in Egypt under Mursi came into power, the leaderships in Riyadh and Abu Dhabi established themselves as counter-revolutionary forces to counterbalance the rise of Islamism across the region, which could have undermined their will to preserve the three “Ps”.³⁶ Such an anti-Islamist trajectory was driven not only by rising security risks but also by threat perceptions that could be labelled as “Ikhwanoia”.³⁷ In 2014, both Saudi Arabia and the UAE declared the Muslim Brotherhood as being a terrorist organisation.³⁸

In light of such inner-Gulf competition, Egypt and Tunisia developed into theatres of contestation, as indicated by rising media polarisation³⁹ and disinformation campaigns,⁴⁰ as well as the support for local surrogates, and economic engagement: Saudi Arabia and the UAE invested heavily in consolidating as-Sisi’s power to push back the Islamists, but also Qatar’s role in Egypt (as was shown by financial aid packages and investments amounting to a total of US\$25 billion by Saudi Arabia alone since 2013).⁴¹

Since then, the “Gulf battle”⁴² for North Africa has not come to an end, but rather further intensified after the so-called “Gulf rift” or “Qatar crisis” broke out: in June 2017, Saudi Arabia, the UAE, Egypt, and Bahrain imposed a land and sea blockade against Qatar and accused the Doha leadership, under Emir Tamim, of supporting terrorism, Islamism and Iran.⁴³ Outlined in 12 demands, the “blockading quartet” aimed to sideline Qatar as a relevant regional competitor. As Qatar was accused of punching above its weight by challenging the leadership of Saudi Arabia and the UAE in the region and beyond, the quartet attempted to create an anti-Qatar narrative driven by intense media polarisation and lobby campaigns in “Western” capitals such as Washington, Paris and London.⁴⁴ However, Qatar adapted to the blockade by pursuing foreign policy diversification towards Turkey and China, defending its interests towards European and US partners, and portraying itself as the “victim” of external aggression.⁴⁵ For instance, security cooperation with Turkey was extended and Iran opened its airspace to Qatar Airlines. As part of this inner-Gulf competition, ultra-nationalism in favour of the

³⁶ Sebastian Sons and Inken Wiese, *The Engagement of Arab Gulf States in Egypt and Tunisia since 2011: Rationale and Impact*, DGAPanalyse Number 9, German Council on Foreign Relations, December 2015, https://dgap.org/system/files/article_pdfs/2015-09g.pdf.

³⁷ Sebastian Sons, *Lost in Iranoia: Saudi Arabia’s Struggle for Regional Hegemony in Times of Crisis*, in: *Orient IV*/2016: pp. 7-21.

³⁸ Peter Salisbury, *Risk Perception and Appetite in UAE Foreign and National Security Policy*, Research Paper, Middle East and North Africa Programme, Chatham House, July 2020, <https://www.chathamhouse.org/sites/default/files/2020-07-01-risk-in-uae-salisbury.pdf>.

³⁹ Sarra Gira, *Tunisia: Battleground for the Gulf Media*, *Orient XXI*, July 8, 2020, <https://orientxxi.info/magazine/tunisia-battle-ground-for-the-gulf-media,4019>.

⁴⁰ Anna L. Jacobs, *Regional and Global Power Competition Deepens Fault Lines Across the Southern Mediterranean*, Arab Gulf Institute in Washington, October 21, 2020, <https://agsiw.org/regional-and-global-power-competition-deepens-fault-lines-across-the-southern-mediterranean/>.

⁴¹ James M. Dorsey, *Saudi Arabia V. Morocco: Competing For The Mantle Of Moderate Islam*, *LobeLog*, June 22, 2018, <https://lobelog.com/saudi-arabia-v-morocco-competing-for-the-mantle-of-moderate-islam/>, David Hernández Martínez, *Morocco and the GCC: between Saudi Arabia and Qatar*, London School of Economics and Political Science, September 25, 2017, <https://blogs.lse.ac.uk/mec/2017/09/25/morocco-inside-the-gcc-between-saudi-arabia-and-qatar/>.

⁴² Interview with a Saudi political analyst, May 25, 2021.

⁴³ Kristian Coates Ulrichsen, *Qatar and the Gulf Crisis*, Oxford: Oxford University Press, 2020.

⁴⁴ *Ibid.*

⁴⁵ Andreas Krieg (ed.), *Divided Gulf: The Anatomy of a Crisis*, Singapore: Palgrave Macmillan 2019.

respective leaders, such as MbS, MbZ, and Tamim, emerged and created an atmosphere of mutual mistrust among the Gulf states. Economically, Qatar faced substantial shortages in neither food nor energy supply. Based on the Saudi and UAE miscalculation that then-US President Donald Trump would provide the “blockading quartet” with a *carte blanche* to marginalise Qatar, the Gulf crisis, instead, turned out to be a self-fulfilling prophecy: the more Qatar was blamed for cooperating with Iran and Turkey, the more such rapprochement took place.⁴⁶

Nevertheless, the Gulf rift did not remain inside of the Gulf, but also tremendously affected the whole region, as the opposing parties exported their competition to other parts of the Near and Middle East, which was shown extensively in Sub-Saharan Africa, the Horn of Africa, but also the Maghreb. Interestingly, all Maghreb states remained “positively neutral”⁴⁷ during the Gulf crisis in order to avoid internal polarisation and assume a more independent position towards the warring Gulf parties. As all Maghreb states are facing tremendous internal cleavages, as indicated by rising unemployment, radicalisation and marginalisation as well as military conflict, political turmoil, and public protests against ruling elites, they decided to show more pragmatism and less assertiveness in promoting their national priorities. Such non-partisan neutrality was mainly driven by the assessment that the significance of the Gulf states as providers of financial assistance, trade, and foreign investment was not as dominant as expected: despite the fact that all Gulf states pledged tremendous amounts of financial aid in the aftermath of the “Arab uprisings”, their real disbursements did not fully materialise.⁴⁸ For instance, the 2011 Gulf pledge of US\$5 billion over five years to Morocco for tourism and infrastructure projects was never fully disbursed, largely due to the lacking commitment of Qatar and Saudi Arabia.⁴⁹

In addition, the Gulf–Maghreb trade volume remained modest in comparison to business ties with European countries such as France, Italy and Spain: by 2017, less than 1% of North African products were exported to the Gulf countries⁵⁰ (see Tables 1–3). Unlike Egypt, the economies of Morocco, Algeria and Tunisia did not heavily rely on Gulf money, but have established business partnerships with new partners such as Turkey and China as well as with traditional partners from Europe.

⁴⁶ Sébastien Boussois, *Iran and Qatar: A Forced Rapprochement*, in: Andreas Krieg (ed.), *Divided Gulf: The Anatomy of a Crisis*, London: Palgrave Macmillan, 2019: pp. 217–232.

⁴⁷ Interview with a French researcher on Gulf foreign policy, April 12, 2021.

⁴⁸ Interview with a European researcher on Gulf engagement in North Africa, April 20, 2021.

⁴⁹ Carolyn Barnett, *GCC-Maghreb Relations in a Changing Regional Order*, Center for Strategic and International Studies, August 14, 2013, <https://www.csis.org/analysis/gcc-maghreb-relations-changing-regional-order>.

⁵⁰ <https://www.ft.com/content/cdc16aae-e2bf-11e0-897a-00144feabdc0>.

Table 1: Exports and imports from GCC to Algeria

Year	Saudi Arabia		UAE		Kuwait		Qatar	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
2017	3,962,000 (0.01%)	530,648,000 (1.15%)	48,196,000 (0.14%)	219,498,000 (0.48%)	79,914,000 (0.23%)	15,304,000 (0.03%)	3,313,000 (0.001%)	51,182,000 (0.11%)
2016	7,604,000 (0.03%)	646,461,000 (1.37%)	20,028,000 (0.07%)	324,388,000 (0.69%)	220,000 (0.00%)	17,052,000 (0.04%)	1,750,000 (0.01%)	79,060,000 (0.17%)
2015	6,808,000 (0.02%)	613,633,000 (1.18%)	5,913,000 (0.02%)	337,287,000 (0.65%)	1,250,000 (0.00%)	18,715,000 (0.04%)	1,676,000 (0.00%)	80,024,000 (0.15%)

Source: World Integrated Trade Solution.

Table 2: Exports and imports from GCC to Morocco

Year	Saudi Arabia		UAE		Kuwait		Qatar	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
2018	134,855,000 (0.46%)	1,174,079,000 (2.29%)	52,614,000 (0.18%)	820,118,000 (1.60%)	12,155,000 (0.04%)	31,665,000 (0.06%)	40,537,000 (0.14%)	54,477,000 (0.11%)
2017	122,603,000 (0.48%)	874,797,000 (1.94%)	96,868,000 (0.38%)	522,254,000 (1.16%)	73,057,000 (0.29%)	12,479,000 (0.03%)	24,742,000 (0.10%)	46,539,000 (0.10%)
2016	90,218,000 (0.39%)	799,422,000 (1.92%)	97,610,000 (0.43%)	665,949,000 (1.60%)	6,695,000 (0.03%)	25,745,000 (0.06%)	11,223,000 (0.05%)	54,369,000 (0.13%)
2015	122,325,000 (0.55%)	992,640,000 (2.60%)	54,974,000 (0.25%)	544,663,000 (1.43%)	20,913,000 (0.09%)	39,093,000 (0.10%)	19,052,000 (0.09%)	53,119,000 (0.14%)

Source: World Integrated Trade Solution.

Table 3: Exports and imports from GCC to Tunisia

Year	Saudi Arabia		UAE		Kuwait		Qatar	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
2017	21,659,000 (0.15%)	224,201,000 (1.09%)	78,811,000 (0.56%)	136,637,000 (0.66%)	5,730,000 (0.04%)	16,876,000 (0.08%)	17,209,000 (0.12%)	22,408,000 (0.11%)
2016	19,659,000 (0.14%)	207,096,000 (1.06%)	66,530,000 (0.49%)	146,815,000 (0.75%)	4,728,000 (0.03%)	17,626,000 (0.09%)	7,743,000 (0.06%)	28,707,000 (0.15%)
2015	22,896,000 (0.16%)	237,010,000 (1.17%)	64,150,000 (0.46%)	119,513,000 (0.59%)	7,082,000 (0.05%)	20,714,000 (0.10%)	10,188,000 (0.07%)	16,917,000 (0.08%)

Source: World Integrated Trade Solution.

Against this backdrop, the North African countries did not take sides during the feud, as neither the “blockading states” nor Qatar were in a position to offer them substantial economic, financial and political incentives to join the respective bloc.⁵¹ Instead, Maghreb countries have prioritised their national agendas over external interests by staying away from the inner-Gulf frictions.⁵² In doing so, the Maghreb states challenged the Gulf countries’ self-perception as regional leaders and limited their influence as dominant actors in the Maghreb,

⁵¹ Anna L. Jacobs, *Resolution of Gulf Rift Not Likely to Mend Fault Lines in North Africa*, Arab Gulf Institute in Washington, January 21, 2020, <https://agsiw.org/resolution-of-gulf-rift-not-likely-to-mend-fault-lines-in-north-africa/>.

⁵² Haim Malka, *Maghreb Neutrality: Maghreb-Gulf Arab Ties Since the GCC Split*, Analysis Paper, Center for Strategic and International Studies, June 2018, https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/181209_Maghreb_GCC.pdf.

which also affects the interregional power balance.

Notwithstanding, the Gulf feud did not ignite, but rather intensified, still-existing and deep-rooted power imbalances between the Gulf and North African countries in terms of diplomatic, economic and political contestations:

Algeria

• **In short, Algeria performed a balancing act during the Qatar blockade by fostering reconciliation with Iran and Qatar.** At the same time, the post-Bouteflika government is in dire need of external investment and military support, which has resulted in closer exchanges with Saudi Arabia and the UAE. In turn, all Gulf states consider Algeria to be a relevant political and military player in North Africa, as it remains its status as the largest importer of defence equipment in Africa (with a military budget of US\$10 billion in 2018). For instance, Algeria constitutes the second-largest recipient of the UAE's weapon sales. During the mass protests directed against then-President Abdelaziz Bouteflika's decision to run for a fifth term after 20 years in power, the oppositional Hirak movement publicly denounced this close UAE–Algeria cooperation in military and security terms as interference in domestic affairs.⁵³ After Bouteflika was ousted in April 2019 and Deputy Defence Minister Ahmed Gaid Salah took power, the latter was also blamed for being an “Emirati puppet”⁵⁴ by Hirak (similar to his successor Said Chengriha, the interim Chief of Staff).

• **Algeria did not align with either Gulf party during the rift.**⁵⁵ Since Algeria's regional policy is dominated by the conflict with Morocco regarding the Western Sahara, as the former generally supports the Polisario, which has resulted in skirmished bilateral relations with Morocco,⁵⁶ Algeria's leadership considered the Gulf rift to be an opportunity to establish closer ties with Iran and Turkey in order to exert more pressure on pro-Moroccan Gulf states such as Saudi Arabia and the UAE.⁵⁷ For instance, the new President Abdelmadjid Tebboune hosted foreign ministers from both the UAE and Saudi Arabia, as well as Qatar's Emir.

• **Following the end of the Algerian Civil War, the political system isolated itself strongly from external influence in terms of economic and security partnerships.**⁵⁸ The “black decade” not only caused psychological trauma undermining Algerian social cohesion, but also resulted in a protectionist foreign policy approach based on non-alignments. From a Gulf perspective, Algeria was thus considered for a long time to be a “black box” or a “neu-

⁵³ Anna L. Jacobs, *Regional and Global Power Competition Deepens Fault Lines Across the Southern Mediterranean*, Arab Gulf States Institute in Washington, October 21, 2020, <https://agsiw.org/regional-and-global-power-competition-deepens-fault-lines-across-the-southern-mediterranean/>.

⁵⁴ Youssef Cherif, *The Maghreb: A Battle Ground for the Intra-Sunni Cold War*, IEMed, 2020, <https://www.iemed.org/publicacions-en/historic-de-publicacions/focus/165.-the-maghreb-a-battle-ground-for-the-intra-sunni-cold-war>.

⁵⁵ <https://www.al-monitor.com/originals/2017/12/algeria-independent-approach-gulf-crisis.html>.

⁵⁶ *Algiers hosts the Polisario and takes a position in favour of its independence (together with other relevant African states such as South Africa and Nigeria)*.

⁵⁷ <https://nationalinterest.org/blog/buzz/iran-s-mischief-morocco-problem-181702>.

⁵⁸ Carolyn Barnett, *GCC-Maghreb Relations in a Changing Regional Order*, Center for Strategic and International Studies, August 14, 2013, <https://www.csis.org/analysis/gcc-maghreb-relations-changing-regional-order>.

rotic and isolated country similar to North Korea”.⁵⁹ “The country is much more immune to foreign influence due to its hydrocarbon wealth and significant foreign reserves”.⁶⁰ The more Qatar supported Islamist movements across the region in the aftermath of the “Arab uprisings”, the more Algeria’s government feared facing a new Islamist opposition (similar to the civil war in the 1990s).⁶¹ However, such concern has diminished, since Qatar has adopted a different foreign policy approach under Emir Tamim.

• **Algeria is strongly concerned about the entrenched military engagement of regional powers in neighbouring Libya, such as the UAE and Turkey, which is considered a direct threat to Algeria’s national security interests.**⁶² In Libya, Muammar al-Ghaddafi had represented a threat to Algeria’s security for a long time, as he was blamed for supporting Algerian Islamists in the 1990s⁶³ and for having unpredictable regional policy.⁶⁴ Nonetheless, Algeria opposed the 2011 NATO intervention in Libya, as it favoured its unilateral discrete and behind-the-scenes mediation efforts through local agents and was troubled by inner-Libyan chaos and spreading regional unrest and instability. In addition, the growing emergence of external powers such as Saudi Arabia led to further Algerian concerns surrounding a rise of Salafi and jihadist groups (which would further destabilise the Sahel region and increase migration and arms trafficking).⁶⁵ The UAE’s support for General Khalifa Haftar was also opposed, as his military campaign against the Government of National Accord (GNA) (see below) undermined Algeria’s mediation efforts. This was indicated by Algeria’s participation in the Berlin Conference in January 2020 after the removal of Bouteflika and the inauguration of the new government under Tebboune.

• **Saudi Arabia and the UAE criticised Algeria’s refusal to designate Hezbollah⁶⁶ and Hamas as terrorist organisations.**⁶⁷ In March 2016, the League of Arab States declared Hezbollah a terrorist organisation which was opposed by Algeria. As Algeria and Iran share a common position on the Western Sahara Conflict, it has been reported that Iran-backed Hezbollah established personal contact with the Polisario (facilitated by Iran).⁶⁸ In

⁵⁹ Interview with a European expert on Gulf–Maghreb relations, April 15, 2021.

⁶⁰ Anna L. Jacobs, *Regional and Global Power Competition Deepens Fault Lines Across the Southern Mediterranean, Arab Gulf States Institute in Washington*, October 21, 2020, <https://agsiw.org/regional-and-global-power-competition-deepens-fault-lines-across-the-southern-mediterranean/>.

⁶¹ Carolyn Barnett, *GCC-Maghreb Relations in a Changing Regional Order*, Center for Strategic and International Studies, August 14, 2013, <https://www.csis.org/analysis/gcc-maghreb-relations-changing-regional-order>.

⁶² Anna L. Jacobs, *Regional and Global Power Competition Deepens Fault Lines Across the Southern Mediterranean, Arab Gulf Institute in Washington*, October 21, 2020, <https://agsiw.org/regional-and-global-power-competition-deepens-fault-lines-across-the-southern-mediterranean/>.

⁶³ Yahia H. Zoubir, *Algeria: Preventing Chaos*, Sadeq Institute, March 17, 2021, <https://www.sadeqinstitute.org/short-reads/algeria-libya>.

⁶⁴ Yahia H. Zoubir, *Tilting the Balance toward Intra-Maghreb Unity in Light of the Arab Spring*, in: *International Spectator*, Vol. 47, No. 3 (September 2012), p. 92.

⁶⁵ Yahia H. Zoubir, *Qaddafi’s Spawn: What the Dictator’s Demise Unleashed in the Middle East*, *Foreign Affairs*, July 24, 2012, <https://www.foreignaffairs.com/articles/algeria/2012-07-24/qaddafis-spawn>.

⁶⁶ Florence Gaub, *Both Ends of the Spectrum: GCC-Maghreb Relations*, *The AGSIW Gulf Rising Series*, Arab Gulf Institute in Washington, December 19, 2017, https://agsiw.org/wp-content/uploads/2017/12/Gaub_GCC-Maghreb_ONLINE-1.pdf.

⁶⁷ Jacques Rousselier, *Disjointed Gulf–Maghreb Cooperation*, *Carnegie Endowment for International Peace*, January 18, 2018, <https://carnegieendowment.org/sada/75301>.

⁶⁸ <https://al3omk.com/293206.html>.

addition, Algeria's non-interventionist stance towards the Syrian regime of Bashar al-Assad concerned Saudi Arabia and the UAE, as Algeria continued to operate its embassy in Damascus and exchanged visits with Syrian officials.⁶⁹ Moreover, Algeria aims to develop close economic, security and political ties with Sub-Saharan countries which intensifies the rivalry with Morocco regarding "regional hegemony" on multiple levels and undermines the UAE's and Saudi Arabia's ties with Morocco.⁷⁰ In turn, several Algerian political stakeholders openly criticised the UAE's decision to open a consulate in the Western Sahara as an act against the national interests of and an "aggressive stance towards Algeria".⁷¹ Such criticism resulted in a reaction from the UAE, which pressurised the Algerian government to limit its cooperation with UAE rival Turkey in terms of "political and economic sanctions". Such a move indicated the ongoing tensions between Tebboune and the UAE leadership, as both take diametral positions in Libya and towards the Palestinian cause.⁷² Finally, Algeria's hydrocarbon wealth serves as an instrument with which to follow a more self-reliant approach towards external players.⁷³ In terms of oil production, Saudi Arabia and Algeria oftentimes follow opposing strategies as OPEC members, since Algeria challenges Saudi Arabia's function as a traditional "swing producer" in terms of the oil production quota.⁷⁴

• **Despite such contested relations with Algeria, all Gulf states aim to gain more economic leverage in Algeria:**⁷⁵ for instance, Qatar invested almost US\$2 billion in a steel plant located in the East, in addition to investments of US\$600 million in Algeria's banking, real estate, and tourism sectors. Similar to Qatar, the UAE invested in Algeria's energy sector, as was indicated by the US\$1 billion agreement signed between Algeria's state-owned hydrocarbon company Sonatrach and Dubai's Dodsai to construct a gas-oil separation plant in June 2017,⁷⁶ as well as UAE investment in a military production site in April 2018.⁷⁷ Furthermore, Saudi Arabia and Algeria signed an MoU in the field of housing and infrastruc-

⁶⁹ Florence Gaub, *Both Ends of the Spectrum: GCC-Maghreb Relations*, The AGSIW Gulf Rising Series, Arab Gulf Institute in Washington, December 19, 2017, https://agsiw.org/wp-content/uploads/2017/12/Gaub_GCC-Maghreb_ONLINE-1.pdf.

⁷⁰ Anna Jacobs, *The Battleground for the Morocco-Algeria Rivalry*, Jadaliyya, October 25, 2017, <https://www.jadaliyya.com/Details/34645>.

⁷¹ <https://www.middleeastmonitor.com/20201128-algerias-parliament-speaker-accuses-uae-of-targeting-revolutionary-arab-positions/>.

⁷² <https://www.dailysabah.com/politics/diplomacy/uae-threatens-algeria-with-sanctions-over-cooperation-with-turkey-report-says>.

⁷³ Anna L. Jacobs, *Regional and Global Power Competition Deepens Fault Lines Across the Southern Mediterranean*, Arab Gulf Institute in Washington, October 21, 2020, <https://agsiw.org/regional-and-global-power-competition-deepens-fault-lines-across-the-southern-mediterranean/>.

⁷⁴ Youssef Cherif, *The Maghreb: A Battle Ground for the Intra-Sunni Cold War*, European Institute of the Mediterranean, June 2020, <https://www.iemed.org/publicacions-en/historic-de-publicacions/focus/165.-the-maghreb-a-battle-ground-for-the-intra-sunni-cold-war>.

⁷⁵ Anna L. Jacobs, *Regional and Global Power Competition Deepens Fault Lines Across the Southern Mediterranean*, Arab Gulf Institute in Washington, October 21, 2020, <https://agsiw.org/regional-and-global-power-competition-deepens-fault-lines-across-the-southern-mediterranean/>.

⁷⁶ Haim Malka, *Maghreb Neutrality: Maghreb-Gulf Arab Ties Since the GCC Split*, Analysis Paper, Center for Strategic and International Studies, June 2018, https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/181209_Maghreb_GCC.pdf.

⁷⁷ Youssef Cherif, *The Maghreb: A Battle Ground for the Intra-Sunni Cold War*, European Institute of the Mediterranean, June 2020, <https://www.iemed.org/publicacions-en/historic-de-publicacions/focus/165.-the-maghreb-a-battle-ground-for-the-intra-sunni-cold-war>.

ture development in January 2021⁷⁸ and are engaged through the Algerian Saudi Investment Company (ASICOM), which was established in 2008 with capital of US\$75 million. Since then, ASICOM has been said to be involved in several infrastructure and tourism projects such as Rusica Park, the City Mall located in Constantine, and the Azemmour Hotel located in Bejaia.⁷⁹ However, Algeria has not opened up completely to international business partners in recent years, which has significantly hampered Gulf efforts to foster investments in the Algerian energy, real estate, and infrastructure sectors. In the case of the UAE, most of the investments in Algerian malls and tourist resorts by UAE real estate company Emaar Properties have failed thus far due to inefficient bureaucracy, internal political struggles, rising corruption, and contested land ownerships.⁸⁰ Nevertheless, Algeria remains an interesting market for the UAE in terms of real estate projects, as indicated by the current negotiations of Emaar Properties with the Algerian government to sign agreements on investments totalling US\$20 billion in March 2021.⁸¹

Morocco

• **As the only Maghreb monarchy, Morocco serves a special function for all Gulf states to preserve monarchical legitimacy.** Morocco's strategic significance became obvious in the direct aftermath of the "Arab uprisings", when the Gulf states invited Morocco and Jordan to become members of the Gulf Cooperation Council (GCC).⁸² Forming a regional "club of monarchies"⁸³ was aimed at closing the ranks and files against anti-monarchical and Islamist forces in order to preserve political survival by creating synergies in terms of financial, political and economic assistance. Against this backdrop, Saudi Arabia, Kuwait, the UAE, and Qatar pledged US\$1.25 billion each to Morocco in the aftermath of the "Arab uprisings".⁸⁴ However, such a "club" did not materialise.⁸⁵

• **Large Gulf investments in Moroccan infrastructure and tourism constituted another main pillar of the close bilateral relationship.** Besides France, Saudi Arabia, the UAE, and Qatar constitute the largest foreign investors in the real estate, tourism, banking, energy, and infrastructure sectors.⁸⁶ In 2014, they co-organised the annual Gulf Morocco Investment Forum, wherein they pledged a US\$120 billion investment package for various sec-

⁷⁸ <https://www.saudigazette.com.sa/article/602374>.

⁷⁹ <https://www.asicom.dz/index.php/en/activities>.

⁸⁰ Interview with a UAE political analyst, April 26, 2021.

⁸¹ <https://gulfnnews.com/business/property/emaar-negotiates-major-investment-deals-with-algeria-1.267068>.

⁸² Anna L. Jacobs, *Regional and Global Power Competition Deepens Fault Lines Across the Southern Mediterranean*, Arab Gulf Institute in Washington, October 21, 2020, <https://agsiw.org/regional-and-global-power-competition-deepens-fault-lines-across-the-southern-mediterranean/>.

⁸³ <https://www.washingtonpost.com/news/monkey-cage/wp/2016/07/29/the-emerging-monarchies-club-in-the-middle-east/>.

⁸⁴ https://www.marocafrik.com/english/Press-The-GCC-will-aid-Morocco-with-five-billion-dollars_a2052.html.

⁸⁵ Shadi Hamid, *A New Security Strategy, but Not Necessarily a New Gulf Cooperation Council*, Brookings, May 16, 2011, <https://www.brookings.edu/opinions/a-new-security-strategy-but-not-necessarily-a-new-gulf-cooperation-council/>.

⁸⁶ Haim Malka, *Maghreb Neutrality: Maghreb-Gulf Arab Ties Since the GCC Split*, Analysis Paper, Center for Strategic and International Studies, June 2018, https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/181209_Maghreb_GCC.pdf.

tors.⁸⁷ Furthermore, Arab donors have been active in Morocco via the Deauville Partnership, which was jointly established in 2012 by the G8 (now G7) and GCC member states in order to harmonise development assistance in transitional countries following the “Arab uprisings”. They also co-financed the MENA Transition Fund⁸⁸ of US\$250 million in grants for technical cooperation to help transitional countries strengthen their governance, social and economic institutions by developing and implementing home-grown and country-owned reforms. From 2013 to 2017, Morocco received US\$43 million from this fund. From 1975 until 2015, the Saudi Fund for Development (SFD) provided financial assistance for infrastructure projects in the transport, energy, and agriculture sectors with a volume of US\$595 million. In 2019, the SFD provided US\$16.78 million to Morocco.⁸⁹ Saudi private investments in Morocco had reached US\$4 billion before the end of 2017, particularly in renewable energies, energy, real estate, industry, agriculture, and tourism. In terms of private investments, Qatar’s sovereign wealth fund and the Moroccan state agreed to establish a joint investment fund worth US\$2 billion in 2011. Kuwait financially supported Morocco with a US\$85 million loan for the high-speed-train project between Tangier and Casablanca in 2011, as well as for electricity transmission in the southern provinces of Morocco. Finally, the Abu Dhabi Fund for Development has provided US\$9 billion in grants and concessionary loans for 81 projects in the sectors of infrastructure, social development, education, healthcare, and housing since 1976.⁹⁰

• **In general, Morocco has close political and personal relations with all Gulf states, which is especially true for Saudi Arabia.** Over the past decades, Saudi Arabia has constituted a traditional partner for the Moroccan leadership in terms of security and political cooperation: 1,200 Moroccan troops were stationed inside of Saudi Arabia and 500 were sent to the UAE during the Gulf War in 1990–1991. Against Da’ish, Morocco provided support to the Gulf alliance in Syria and Iraq. In November 2017, Saudi Arabia pledged US\$100 million to finance the Moroccan-French-backed Group of Five Sahel (G5 Sahel) Joint Force (consisting of Mali, Niger, Chad, Burkina Faso, and Mauritania) to combat armed groups and control irregular migration.⁹¹ On an individual level, cordial family relations between the ruling families developed after late Saudi King Saud bin Abdulaziz Al Sa’ud (ruled 1953–1964) was invited to join the coronation of late King Hassan II in 1961 (ruled 1961–1999).⁹² Furthermore, family ties grew stronger, as shown by the brother of King Hassan II, i.e. Abdallah, who was the brother-in-law of Saudi Prince Talal bin Abdelaziz Al Sa’ud; both of them were married to daughters of Riad as-Solh, the first Prime Minister of Lebanon (1943–1945). The Saudi royal family owns several luxury summer resorts and palaces in Morocco.⁹³ In terms of political coordi-

⁸⁷ https://www.zawya.com/uae/en/press-releases/story/GOIC_participates_in_the_4th_GCCMorocco_Investment_Forum_and_Expo_in_Casablanca-ZAWYA20141130114815/.

⁸⁸ <https://www.menatransitionfund.org>.

⁸⁹ <https://www.sfd.gov.sa/documents/20124/36962/2019-EN-AnnualReport.pdf/3a718a51-6a6e-9f01-47a3-d1d526371909?t=1603080548153>.

⁹⁰ https://www.adfd.ae/english/Countries/Pages/countrydetails_new.aspx?14.

⁹¹ <https://www.aljazeera.com/videos/2017/12/13/uae-saudi-arabia-join-g5-sahel-force-summit-in-paris>.

⁹² Samir Bennis, *The Moroccan-Saudi Rift: The Shattering of a Privileged Political Alliance*, Al Jazeera Centre for Studies, April 3, 2019, https://studies.aljazeera.net/sites/default/files/articles/reports/documents/cc823bc5098244a7841eb-2de34655d16_100.pdf.

⁹³ Adel Abdel Ghafar and Anna L. Jacobs, *Morocco-Saudi relations: Trouble amongst royals?* Brookings, March 1, 2019, <https://www.brookings.edu/blog/order-from-chaos/2019/03/01/morocco-saudi-relations-trouble-amongst-royals/>.

nation, both countries share similar views on Palestine, as was shown by Morocco's support for the Arab Peace Initiative (API) launched by the late Saudi King Abdullah in 2002 or joint efforts to establish the Organisation of Islamic Cooperation (OIC) in September 1969.

• **However, Saudi Arabia–Morocco relations saw ups and downs in recent years.** The Moroccan neutrality during the Gulf crisis constituted only the tip of the iceberg of rising contestation with the Kingdom.⁹⁴ In order not to undermine Morocco's regional ambitions, King Muhammad VI decided to maintain a neutral position towards the Gulf feud. Saudi Arabia reacted in a harsh way; specifically, one of the closest companions of MbS, his personal adviser and the former chairperson of the General Sports Authority, i.e. Turki al-Shaykh, facilitated a lobbying campaign against the Moroccan bid to host the FIFA World Cup 2026, which was finally rejected by Saudi Arabia, the UAE, Bahrain, Kuwait, Jordan, Lebanon, and Iraq in favour of the US–Mexican–Canadian bid.⁹⁵ In Morocco, the Saudi decision was widely perceived to be a betrayal.⁹⁶ As Morocco provided Doha with food shipments immediately after the outbreak of the blockade,⁹⁷ organised the seventh meeting of the Qatari–Moroccan Joint Supreme Committee in Rabat in March 2018 to discuss closer economic, political and trade cooperation,⁹⁸ and intensified its security and defence cooperation with Qatar by taking part in several military exercises such as the “Impregnable Guard 2020” in Qatar in March 2020,⁹⁹ Riyadh became even more infuriated. Morocco, in turn, aimed to prevent Qatar from seeking closer cooperation with its regional competitor Algeria in terms of joint gas and infrastructure projects.¹⁰⁰

• **Based on political vulnerabilities and unpredictable strategic patterns, Morocco is recalibrating its economic partnerships with all Gulf states to win more autonomy and agency in terms of economic engagement.**¹⁰¹ As Morocco has been reorientating its regional policy more towards Africa since re-entering the African Union (AU) in January 2017 and becoming a member of the AU's Peace and Security Council in 2018, foreign policy priorities have changed.¹⁰² Morocco is seeking not only South–South economic diversification, but also empowerment as an African powerhouse. In 2018, more than 85% of Morocco's

⁹⁴ Giorgio Cafiero, *Mounting tensions between Morocco and Saudi Arabia*, Middle East Institute, March 5, 2019, <https://www.mei.edu/publications/mounting-tensions-between-morocco-and-saudi-arabia>.

⁹⁵ <https://theArabweekly.com/moroccos-loss-2026-world-cup-bid-highlights-arab-divide>, <https://www.nytimes.com/interactive/2018/06/08/sports/worldcup/fifa-vote-world-cup-2026-host.html>.

⁹⁶ <https://english.alaraby.co.uk/english/comment/2018/5/9/betraying-morocco-saudis-back-trump-for-world-cup-2026>.

⁹⁷ <https://www.reuters.com/article/us-gulf-qatar-morocco/morocco-says-will-send-food-to-qatar-after-gulf-states-cut-ties-idUSKBN1940RD>.

⁹⁸ <https://www.gulf-times.com/story/584876/Qatar-Morocco-to-forge-strategic-partnership>.

⁹⁹ <https://www.morocoworldnews.com/2020/03/295369/morocco-to-participate-in-impregnable-guard-2020-exercise-in-qatar/>.

¹⁰⁰ Youssef Cherif, *The Maghreb: A Battle Ground for the Intra-Sunni Cold War*, European Institute of the Mediterranean, June 2020, <https://www.iemed.org/publicacions-en/historic-de-publicacions/focus/165.-the-maghreb-a-battle-ground-for-the-intra-sunni-cold-war>.

¹⁰¹ Sarah Feuer and Reda Ayadi, *Twenty Years Under King Mohammed VI (Part 2): Foreign Policy Developments*, PolicyWatch 3157, The Washington Institute for Near East Policy, July 29, 2019, <https://www.washingtoninstitute.org/pdf/view/1627/en>.

¹⁰² <https://www.aljazeera.com/news/2017/1/31/morocco-rejoins-the-african-union-after-33-years>.

FDI was spent in Sub-Saharan states.¹⁰³ In this regard, Morocco considers itself to be a self-reliant economic player performing proactively in terms of investments and fostering economic diversification. As a result, Gulf states' FDI in Morocco has declined in recent years,¹⁰⁴ not only due to Morocco's reorientation towards Sub-Saharan Africa, Russia, and China, but also due to rising inner-Gulf domestic socioeconomic challenges, the Gulf "pivot to Asia" strategy, and an ongoing trend in countries such as Saudi Arabia to foster localisation.¹⁰⁵ Still, the UAE constitutes one of the most relevant investors in Morocco, but Saudi and Kuwaiti investments dropped by over 69% in 2018 in comparison to the previous year.¹⁰⁶ In addition, Saudi Arabia disbursed only US\$868 million by December 2018 out of its US\$1.25 billion grant pledged in 2012, whereas Qatar and Kuwait completely fulfilled their commitments.¹⁰⁷ In 2013, several projects were launched to improve Morocco–Gulf relations, such as Saudi Arabia's announcement that it would invest US\$500 million in the Moroccan solar industry, as well as joint investments from Kuwait, the UAE, and Qatar in the Moroccan tourism sector (with total capital of US\$2.4 billion in 2012).¹⁰⁸ Furthermore, as part of a joint defence cooperation agreement signed in 2016, Saudi Arabia agreed to invest US\$22 billion in Morocco's military infrastructure.¹⁰⁹ However, as of today, none of those ambitious investment projects have fully materialised, which further undermines the Gulf's reliability as a trustworthy business partner.¹¹⁰

• **In terms of security cooperation, the Saudi military engagement in Yemen constitutes a quagmire for Morocco's ambitions in Africa.** MbS's rise to power as the de facto leader inside of the Kingdom has fundamentally shaped Saudi Arabia's regional priorities and interests. By following a more assertive foreign policy in the first years of his reign, the Crown Prince distanced himself from the more nuanced traditional Saudi approach: whereas the older leadership generation aimed to act in a more indirect way by empowering proxies, creating patronage networks, and financing local clients in order to avoid military confrontation and direct entanglement in disturbing conflict theatres, the young Crown Prince adopted a more proactive approach, which became obvious in Yemen, or the blockade against Qatar. Neither were welcomed by the Moroccan King. As a consequence, Morocco decided, in 2018, to stop its military support for the Saudi-led campaign in Yemen, specifically 1,500 troops and six aircraft,¹¹¹ since internal discontent increased after a Moroccan F-16 fight-

¹⁰³ <https://www.economist.com/middle-east-and-africa/2018/07/19/why-morocco-is-cosying-up-to-sub-saharan-africa>.

¹⁰⁴ Intissar Fakir, *Morocco: Era of Strategic Partnership Is Over*, Carnegie Endowment for International Peace, June 9, 2020, <https://carnegieendowment.org/2020/06/09/morocco-era-of-strategic-partnership-is-over-pub-82011>.

¹⁰⁵ <https://www.middleeastmonitor.com/20190524-arab-investments-in-morocco-declining-for-third-year-in-row/>.

¹⁰⁶ <https://carnegieendowment.org/2020/06/09/morocco-era-of-strategic-partnership-is-over-pub-82011>.

¹⁰⁷ Intissar Fakir, *Morocco: Era of Strategic Partnership Is Over*, Carnegie Endowment for International Peace, June 9, 2020, <https://carnegieendowment.org/2020/06/09/morocco-era-of-strategic-partnership-is-over-pub-82011>.

¹⁰⁸ Carolyn Barnett, *GCC-Maghreb Relations in a Changing Regional Order*, Center for Strategic and International Studies, August 14, 2013, <https://www.csis.org/analysis/gcc-maghreb-relations-changing-regional-order>.

¹⁰⁹ <https://www.moroccoworldnews.com/2016/01/176944/saudi-arabia-to-provide-22-billion-to-moroccos-military-industry/>.

¹¹⁰ See the interview with a Moroccan political analyst in April 2021.

¹¹¹ Florence Gaub, *Both Ends of the Spectrum: GCC-Maghreb Relations*, The AGSIW Gulf Rising Series, Arab Gulf Institute in Washington, December 19, 2017, https://agsiw.org/wp-content/uploads/2017/12/Gaub_GCC-Maghreb_ONLINE-1.pdf.

ter was shot down in 2015.¹¹² As Yemen turned out to be a humanitarian disaster for the Yemeni civilian population, Morocco distanced itself from the Saudi position. That decision constituted a thorn in the Saudi side, as the leadership under MbS needed political and military support from allied Islamic and Arab countries in order to legitimise its intervention against the Houthis and consolidate inner-Arab and Islamic unity and regional leadership.

• **Additionally, close, personal ties between the Moroccan and Saudi ruling families have weakened in recent years.** King Salman no longer regularly spent his summer holidays in Tangiers.¹¹³ Instead, he and his son, MbS, decided to remain in NEOM – the main prestigious project of the ambitious Saudi development strategy “Vision 2030”, which was launched by the Crown Prince on the shores of the Red Sea. NEOM aims to emerge as the “Silicon Valley”¹¹⁴ of the Middle East by promoting digital innovation and technical creativity. Thus, it serves as the symbol of MbS’s ambition to transform Saudi Arabia into a global hub of tech-savvy modernisation, tourism and entertainment.¹¹⁵ In turn, Morocco decided not to invite MbS during his international tour in 2018.¹¹⁶

• **Morocco seeks international backing for its position in terms of the dispute with Algeria’s support for the Western Saharan independence movement,¹¹⁷ the Polisario.** In this regard, diplomatic relations with Saudi Arabia further declined when a documentary aired by Saudi television channel Al-Arabiya put the Moroccan claim on the Western Sahara into question.¹¹⁸ By conveying the impression that Morocco invaded the Western Sahara after Spanish colonial rule terminated in 1975, official Moroccan claims on the territory were called into question. Saudi Arabia traditionally supported the Moroccan position on the territory¹¹⁹ by providing assistance to Morocco’s armed conflict with the Polisario between 1976 and 1991.¹²⁰ As a consequence, Morocco considered the documentary to be a Saudi provocation undermining its engagement in the Western Sahara, and withdrew its ambassador from Riyadh in February 2019.¹²¹ In addition, the dispute intensified soon after Morocco’s decision to end its engagement in Yemen.

¹¹² Haim Malka, *Maghreb Neutrality: Maghreb-Gulf Arab Ties Since the GCC Split*, Analysis Paper, Center for Strategic and International Studies, June 2018, https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/181209_Maghreb_GCC.pdf.

¹¹³ <http://africa-me.com/why-morocco-intervened-in-yemen/>.

¹¹⁴ <https://www.wsj.com/articles/a-princes-500-billion-desert-dream-flying-cars-robot-dinosaurs-and-a-giant-artificial-moon-11564097568>.

¹¹⁵ Yasser Elsheshtawy, *The Line: A Promising Vision for a Progressive Future?* Arab Gulf Institute in Washington, June 3, 2021, <https://agsiw.org/the-line-a-promising-vision-for-a-progressive-future/>.

¹¹⁶ Samir Bennis, *The Moroccan-Saudi Rift: The Shattering of a Privileged Political Alliance*, Al Jazeera Centre for Studies, April 3, 2019, https://studies.aljazeera.net/sites/default/files/articles/reports/documents/cc823bc5098244a7841eb-2de34655d16_100.pdf.

¹¹⁷ Anna L. Jacobs, *Strategic Interests Spark Shift in Morocco’s Gulf Ties*, Arab Gulf Institute in Washington, November 4, 2020, <https://agsiw.org/strategic-interests-spark-shift-in-moroccos-gulf-ties/>.

¹¹⁸ Andrew Hanna, *Saudi-Turkish Clash Reinforces Tensions in the Maghreb*, United States Institute of Peace, November 4, 2020, <https://www.usip.org/publications/2020/11/saudi-turkish-clash-reinforces-tensions-maghreb>.

¹¹⁹ <https://www.reuters.com/article/us-morocco-westernsahara-gulf/gulf-arabs-back-morocco-in-western-sahara-rift-with-u-n-idUSKCN0XIONE>; http://aan.mmsch.univ-aix.fr/Pdf/AAN-1985-24_33.pdf.

¹²⁰ Neil Partrick, *Saudi Arabian Foreign Policy: Conflict and Cooperation*, London, New York, 2016.

¹²¹ <https://www.reuters.com/article/us-morocco-saudi-diplomacy/morocco-recalls-envoy-to-saudi-arabia-for-consultations-morocco-media-idUSKCN1PX17T>.

• **However, neither Saudi Arabia nor Morocco show an interest in a long-term diplomatic stalemate.** From a Saudi perspective, “things went to normal very quickly”.¹²² This was shown by the Moroccan decision to cut diplomatic ties with Iran in 2018, as the Islamic Republic was accused of providing weapons and training to the Polisario.¹²³ Such a decision aimed to undermine the Iran–Algeria links and sent a signal to Saudi Arabia, the UAE, and the Trump administration to restore ties and seek reconciliation.

Libya

• **Oftentimes the conflict in Libya has been framed as an internationalised, “classical proxy war”¹²⁴ driven by local clients supported by external players such as Qatar and the UAE, wherein both Gulf states took opposing sides to foster their respective ideological interests.** Qatar initially engaged by supporting the UN-backed GNA¹²⁵ in Tripoli together with other regional actors such as Turkey and the European Union (EU), whereas the UAE backed the opposing side of Field Marshal Khalifa Haftar’s Libyan Arab Armed Forces (LAAF) together with Egypt and Saudi Arabia. During the initial period of the conflict between 2011 and 2014, Qatar considered Libya to be a strategic option to strengthen its reputation as a post-“Arab uprisings” role model in favour of several Libyan Islamist branches.¹²⁶ During this period, Qatar provided military support and training capacities to local allies on a relatively small level because the capacities of the Qatar Armed Forces (QAF) were limited. As the GNA also featured not only actors closely affiliated with the Muslim Brotherhood but also traditional and more secular actors, tribal units, and local groups, Qatar’s engagement for the GNA was not only pro-Islamist but also driven by more strategic approaches so as to realign with international actors such as the EU or the UN in order to portray itself as a reliable safeguard of multilateralism. As such, Qatar supported Morocco in facilitating the Libyan Political Agreement (LPA) in 2015.¹²⁷ After Emir Tamim started to scale back Qatar’s interventionist regional policy, Qatar’s capacities to shape the events in Libya significantly diminished: in 2014, the last Qatari cargo flight provided pro-Qatari Libyan forces with weapons and other military equipment.¹²⁸ Although Qatar’s influence in Libya has been continuously described as dominant, Doha does not seem to play any relevant role since then.¹²⁹

• **With its military support for the LAAF, the UAE played an important role in post-Ghadafi Libya.** “Gulf Arab competition did not create Libya’s present conflict, but Gulf backing

¹²² Interview with a Saudi political analyst, June 15, 2021.

¹²³ <https://nationalinterest.org/blog/buzz/iran's-mischief-morocco-problem-181702>.

¹²⁴ Interview with a US expert on Libyan affairs, April 12, 2021.

¹²⁵ Kali Robinson, *Who's Who in Libya's War?*, Council on Foreign Relations, June 18, 2020, <https://www.cfr.org/in-brief/whos-who-libyas-war>.

¹²⁶ Kristian Coates Ulrichsen, *The Rationale and Implications of Qatar's Intervention in Libya*, in: Dag Henriksen and Ann Karin Larssen (eds.), *Political Rationale and International Consequences of the War in Libya*, Oxford Scholarship Online, June 2016.

¹²⁷ Noamane Cherkaoui, *Morocco: Positive Neutrality*, Sadeq Institute, March 17, 2021, <https://www.sadeqinstitute.org/short-reads/morocco-libya>.

¹²⁸ Interview with a European researcher on Qatar, April 26, 2021.

¹²⁹ Interview with a European political analyst on Libya, April 20, 2021.

for rival proxy forces has contributed to prolonging Libya's political fragmentation".¹³⁰ The UAE's financial support and the sending of foreign Russian and Syrian mercenaries,¹³¹ as well as the recruitment of Sudanese fighters¹³² and cooperation with the US private security provided by Erik Prince¹³³ fuelled the military conflict in Libya and deepened the fault lines on the ground and between the external warring parties. The cooperation of the LAAF with the Russian Wagner Group¹³⁴ became instrumental during the battle for Tripoli in August 2019. It has been estimated that around 2,000 Wagner comrades operated in Libya between July and September 2020.¹³⁵ It has been further speculated that the Wagner Group received financial contributions from the UAE¹³⁶ which was denied officially from the UAE side.¹³⁷ The UAE also supported Darfuriian armed factions and their commanders who are said to have established close ties with UAE counterparts with direct involvement of the LAAF.¹³⁸ The UAE, in addition to other external actors, was oftentimes accused of breaching the UN arms embargo. Through its military engagement, the UAE aimed to demonstrate not only its technical capacities in terms of air and drone strikes, but also its commitment to gaining influence as an international hard power and providing military training to local forces.¹³⁹ In 2016, the UAE established its first military facility, i.e. al-Khadim, in Eastern Libya, which served as a strategic asset to provide support to the LAAF.¹⁴⁰ In addition, the direct Libyan neighbourhood of the UAE's close ally of Egypt motivated Abu Dhabi to enter the Libyan quagmire: Egypt was seriously concerned about a potential spillover of the Libyan chaos onto its own soil, which could have undermined the power position of as-Sisi – "Abu Dhabi's man in Cairo". Moreover, Libya has been an important receiving country for Egyptian labour migrants.

¹³⁰ Haim Malka, *Maghreb Neutrality: Maghreb-Gulf Arab Ties Since the GCC Split*, Analysis Paper, Center for Strategic and International Studies, June 2018, https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/181209_Maghreb_GCC.pdf.

¹³¹ Andreas Krieg, *Ninety Two Days: How Mercenaries Shape Libya's Conflict and its Resolution*, Sadeq Institute, November 20, 2020, <https://www.sadeqinstitute.org/short-reads/ninety-two-days-how-mercenaries-shape-libyas-conflict-and-its-resolution>.

¹³² <https://www.independent.co.uk/news/world/middle-east/sudan-libya-civil-war-tricked-fighting-b1554374.html>.

¹³³ <https://warisboring.com/erik-princes-mercenaries-are-bombing-libya/>.

¹³⁴ Amy Mackinnon and Jack Detsch, *Pentagon Says UAE Possibly Funding Russia's Shadowy Mercenaries in Libya*, Foreign Policy, November 30, 2020, <https://foreignpolicy.com/2020/11/30/pentagon-trump-russia-libya-uae/>.

¹³⁵ US Department of Defense, *East Africa Counterterrorism Operation, North and West Africa Counterterrorism Operation – Lead Inspector General Report to the United States Congress*, November 23, 2020, <https://www.dodig.mil/Reports/Lead-Inspector-General-Reports/Article/2427451/lead-inspector-general-for-east-africa-and-north-and-west-africa-counterterrori/>.

¹³⁶ *Ibid.*

¹³⁷ <https://foreignpolicy.com/2020/11/30/pentagon-trump-russia-libya-uae/>.

¹³⁸ Tim Eaton, *The Libyan Arab Armed Forces. A network analysis of Haftar's military alliance*, Research Paper, Chatham House, June 2, 2021, <https://www.chathamhouse.org/2021/06/libyan-arab-armed-forces/03-leveraging-external-support>.

¹³⁹ Matthew Hedges, *United Arab Emirates: Reversing the Revolution*, Sadeq Institute, March 17, 2021, <https://www.sadeqinstitute.org/short-reads/uae-libya>.

¹⁴⁰ Anas El Gomati, *Libya's Political Culture Wars*, Libya Brief No. 9, Regional Program Political Dialogue South Mediterranean, Konrad Adenauer Foundation, October 2020, <https://www.kas.de/documents/282499/282548/Libya+Brief+No+9++Li-bya%27s+Political+Culture+Wars.pdf/c99b201a-b8ba-df2a-0298-3be63c478760?version=1.2&t=1604334395106>.

• **The UAE considered Qatar's engagement to be mostly motivated by Doha's alignment with Islamist movements all over the region.**¹⁴¹ The strategic alliance with Haftar thus followed a similar objective to that of the UAE's support for as-Sisi in Egypt by counterbalancing Islamist ideology. Nevertheless, as Qatar rapidly reduced its engagement under Emir Tamim, Libya did not develop into a battleground for Qatar–UAE ideological competition. In contrast, the UAE intensified its military and security activities in order to strike back against Turkey, as the main regional competitor for the UAE (see below).

• **As the situation in Libya seems to be de-escalating as a result of the ongoing political process, all involved Gulf players need to adapt their strategy.** In October 2020, the conflict parties agreed on a ceasefire which led to a UN-headed political process of forming an internationally-recognised Government of National Unity (GNU).¹⁴² This agreement has renewed cautious optimism with regard to solving the military gridlock inside of Libya, since diplomatic efforts such as meetings in Moscow and the Berlin Conference in January 2020 did not resolve all issues, and even resulted in conflict escalation and an “all-out war”¹⁴³ culminating in Haftar's attack on Tripoli in 2019.¹⁴⁴ As the most-invested-in Gulf actor in Libya, the UAE aims to preserve its military leverage even under a single military institution controlled by the GNU. In this regard, the UAE is likely to continue to cooperate with Haftar, who still constitutes the most efficient military power in the country and, thus, is likely to play a future role in the unified army. In doing so, Abu Dhabi seeks to preserve its military and political leverage over the GNU.¹⁴⁵ However, in a broader scope, the UAE's engagement in Libya will be driven by reachable goals that fit into the general regional trajectory: as described by an Emirati researcher, the UAE, as a middle power, aims to present itself as a “force for moderation throughout a turbulent Arab World and greater Middle East”¹⁴⁶ in several hotspots such as Libya. Said narrative of mediation and moderation constitutes the main pillar of the UAE's public diplomacy approach on both a regional and an international level: “Specifically, the UAE is expecting to go from power projection to power protection, from direct regional involvement to an over-the-horizon leadership role with more emphasis on soft power rather than hard power in a post Covid-19 world”.¹⁴⁷ Such a strategy will also be reflected in Libya by combining diplomatic and security elements in order to preserve local leverage and shape the post-conflict future of Libya. Today, Qatar aims to play a more proactive role in the mediation process after the conflict parties agreed on a ceasefire and started negotiations to present themselves as powerbrokers and dealmakers in multilateral fora.¹⁴⁸

¹⁴¹ Anna L. Jacobs, *Regional and Global Power Competition Deepens Fault Lines Across the Southern Mediterranean*, Arab Gulf Institute in Washington, October 21, 2020, <https://agsiw.org/regional-and-global-power-competition-deepens-fault-lines-across-the-southern-mediterranean/>.

¹⁴² Anna L. Jacobs, *Libya 10 Years After the NATO Intervention: U.N. Report Explains Challenges*, Arab Gulf Institute in Washington, March 24, 2021, <https://agsiw.org/libya-10-years-after-the-nato-intervention-u-n-report-explains-challenges/>.

¹⁴³ Anas El Gomati, *Libya's Political Culture Wars*, Libya Brief No. 9, Regional Program Political Dialogue South Mediterranean, Konrad Adenauer Foundation, October 2020, <https://www.kas.de/documents/282499/282548/Libya+Brief+No+9++Libya%27s+Political+Culture+Wars.pdf/c99b201a-b8ba-df2a-0298-3be63c478760?version=1.2&t=1604334395106>.

¹⁴⁴ Anas El Gomati, *A Tale of Two Armies*, Carnegie Middle East Center, March 17, 2021, <https://carnegie-mec.org/2021/03/17/tale-of-two-armies-pub-84075>.

¹⁴⁵ Interview with a Libyan researcher, April 16, 2021.

¹⁴⁶ Abdulkhaleq Abdulla, *The Rise of the United Arab Emirates*, *The Cairo Review of Global Affairs*, Spring 2021, <https://www.thecaireview.com/main-home-page/the-rise-of-the-united-arab-emirates/>.

¹⁴⁷ *Ibid.*

¹⁴⁸ <https://www.sadeqinstitute.org/short-reads/qatar-libya>.

• **In contrast with the UAE and Qatar, Saudi Arabia adopted a more balanced position on Libya.** As explained by a Saudi political analyst, Saudi Arabia considers Libya to be a theatre of geostrategic relevance, but the Saudi government did not show a real commitment to engaging heavily in military or political terms. Such a more distanced approach refers to the changing domestic and regional situation with which Saudi Arabia has to deal, as Saudi Arabia cannot focus on everything at the same time and needs to use its resources smartly.¹⁴⁹ In light of rising instability in the direct neighbourhood of the Kingdom (Yemen, Iraq, Iran, etc.), the Saudi government does not consider North Africa to be specifically relevant. In the case of Libya, Saudi Arabia also lacks the financial, military and political capacities for more engagement. Unlike the UAE and Qatar, Saudi Arabia considers itself to be “somewhat in the middle”¹⁵⁰ and aims to maintain a relatively neutral position, as it is explicitly interested in preserving the country’s unity, preventing rising Turkish influence, and considering Libya to be a gateway to the Horn of Africa – a region that has gained utmost relevance from a Saudi perspective (see below).¹⁵¹ Furthermore, on an ideological level, Saudi Arabia’s official interference in Libya was comparatively limited, despite the fact that some interlocutors¹⁵² still denounce the close ideological and financial links between Saudi Arabia and several Salafi groups,¹⁵³ e.g. the Madkhaliyya,¹⁵⁴ as interference in internal affairs. The Madkhaliyya understood itself originally as being quietist and non-political, but it also emerged as a relevant militant actor after the military conflict escalated in 2014. Some observers consider the strong individual ties between members of the Madkhali-Salafis and their financial and ideological sponsors in Saudi Arabia to be one of the main drivers of inner-Libyan escalation and militarisation. The Madkhaliyya has developed as one of the most relevant branches of conservative Salafism across the Arab world over the last three decades, being further promoted by Saudi religious charities and welfare organisations, as well as by wealthy individuals, and via widespread support from Saudi-owned media outlets.¹⁵⁵ The movement refers to the theological beliefs of Saudi theologian Sheikh Rabi’ Ibn Hadi ‘Umayr al-Madkhali, who follows an ultra-orthodox but politically-quietist thinking that opposes political Islam. In the 1990s, he chaired the Department of Sunna Studies at the Islamic University of Medina (IUM). In recent decades, the IUM has established itself as an educational centre for prominent Salafis and as a hub for Saudi Arabia’s international proselytisation campaigns.¹⁵⁶ Many Libyan, Tunisian and Algerian Salafis have been educated at the IUM and returned home as strong followers of Saudi-styled Salafism. Al-Madkhali positioned himself as a strong, loyal defender of the Saudi royal family during the Gulf War

¹⁴⁹ Interview with a Saudi political analyst, June 15, 2021.

¹⁵⁰ *Ibid.*

¹⁵¹ *Ibid.*

¹⁵² Interview with a Libyan researcher, April 28, 2021; interview with a Tunisian researcher, April 6, 2021.

¹⁵³ Frederic Wehrey and Anouar Boukhars, *Salafism in the Maghreb: Politics, Piety, and Militancy*, New York: Oxford University Press 2019.

¹⁵⁴ International Crisis Group, *Addressing the Rise of Libya’s Madkhali-Salafis*, Report No. 200, April 25, 2019, <https://www.crisisgroup.org/middle-east-north-africa/north-africa/libya/addressing-rise-libyas-madkhali-salafis>.

¹⁵⁵ *Ibid.*

¹⁵⁶ Mike Farquhar, *The Islamic University of Medina since 1961: The Politics of Religious Mission and the Making of a Modern Salafi Pedagogy*, in: Keiko Sakurai and Masooda Bano (eds.), *Shaping Global Islamic Discourses: The Role of al-Azhar, al-Medina and al-Mustafa*, Edinburgh, 2015: pp. 21-40.

in 1990–1991. His pro-Saudi loyalty is based on the main cornerstone of the Madkhaliyya, i.e. to pledge allegiance and obedience to the respective leader (ta'at wali al-amr), which features prominently in Salafism. Based on this belief, revolutionary forces such as Islamists and jihadists, as well as democracy, are rejected as being “un-Islamic” and as opposed to legitimate leadership. In Libya, the movement became established as one of the most influential Salafi groups during the rule of Muammar al-Ghaddafi in the 1990s. At that time, former Libyan students of the IUM and other Madkhaliyya theological centres located in Yemen returned to their home country and spread the Madkhali ideology.¹⁵⁷ Some of those students constitute today’s most prominent Libyan teachers of the Madkhaliyya. However, the more Libyan jihadism gained local relevance and undermined the power of al-Ghaddafi after many mujahidin veterans returned from Afghanistan at the end of the 1980s or from Iraq in the 2000s, the more al-Ghaddafi instrumentalised and co-opted the Madkhaliyya in order to create an anti-jihadi counterweight. After the protests in Libya against al-Ghaddafi started in 2011 and he was removed from power, Libya transformed into a complex theatre of conflict driven by multiple internal and external players and opposing, warring parties. In such a contested environment, the Madkhaliyya became established as one of the most relevant conflict parties. However, it does not act as a unified bloc; instead, several factions joined the internationally-recognised GNA in Western Libya, whereas others fought on the opposing side for Haftar’s LAAF and joined his military campaign, i.e. “Operation Dignity”, which started in May 2014. At that time, the Madkhaliyya played a significant but confusing role, as its followers were neither only aligned with the GNA nor only aligned with Haftar. In doing so, they took the chance to seek tactical alliances in order to benefit from the lack of national institutions, the fragmented conflict landscape, and rising chaos. However, internal conflicts with Madkhali fighters occurred once Haftar presented his military campaign as a fight against radical and militant Islamism and portrayed himself as a promoter of secularism.¹⁵⁸ Such a narrative was directed towards winning the support of external players such as France and the UAE, which proclaimed a similar anti-Islamist rhetoric and narrative to defend their military engagement in Libya. By penetrating the several security apparatuses, the Madkhaliyya not only gained significant military expertise and clout, but also wielded ideological influence over other combatants on all sides. Though mostly present in Tripoli and Benghazi, they also gained a stronghold in Sirte, Kufra, and Sabratha as well as in other rural areas. As the group present themselves as being strictly opposed to jihadism, they became a powerful force in striking back against the Libyan branch of Da’ish, which was welcomed by the international community, Saudi Arabia, and the UAE, which also framed their engagement in Libya as an anti-terrorist campaign: both the UAE and Saudi Arabia considered the Madkhaliyya to be a perfect bulwark against Qatar’s and Turkey’s support for Islamist groups. The UAE’s engagement in Libya was driven by the calculation that Haftar represented the “army as a state institution” against extremism, whereas the government in Tripoli was not considered a “legitimate state entity”.¹⁵⁹ Therefore, both sides – the UAE and Saudi Arabia on the one hand and Qatar and Turkey on the other hand – framed

¹⁵⁷ Interview with a Saudi political analyst, June 15, 2021.

¹⁵⁸ Usaama al-Azami, *Why Words Matter: The Problem with the Term Islamist*, Sadeq Institute, November 23, 2020, <https://www.sadeqinstitute.org/short-reads/why-words-matter-the-problem-with-the-term-islamist>.

¹⁵⁹ Interview with a UAE political analyst, April 26, 2021.

the inner-Libyan conflict more and more as a competition between pro- and anti-Islamist camps with regard to ideological supremacy in the Arab and Islamic world in order to promote their respective worldviews and strategic trajectories. As Haftar launched his military offensive on Tripoli in April 2019 after meeting with Saudi Crown Prince Muhammad bin Salman in Riyadh, his visit raised speculation about direct Saudi support for Haftar's campaign being channelled through the Madkhaliyya as the main pro-Saudi Libyan surrogate.¹⁶⁰ Some labelled Saudi Arabia the "Trojan horse" because of its influence in Libya.¹⁶¹ However, significant evidence of such a strategic partnership is lacking.¹⁶² It seems unlikely that the Libyan Madkhaliyya was directly controlled or provided with arms by the Saudi government and, thus, is no "Saudi product".¹⁶³ Even al-Madkhali himself issued several fatwas to forbid his followers from taking sides in the military conflict, but could not prevent them from doing so. Against this backdrop, the Madkhaliyya must be considered an internal Libyan conflict party following particular and fragmented interests and strategies.

Tunisia

• **During the Gulf feud, Tunisia also did not find itself in a position to take sides.** One decade after the "Arab uprisings" shook the political system in Tunisia, it still suffers from complex political fragility, rising socioeconomic obstacles, overreliance on European support, and diverging power centres inside and outside of the government (such as influential and powerful trade unions).

• **Nonetheless, the Gulf rift played out in Tunisia between the opposing parties, which resulted in further political fragmentation.** Tunisian President Kais Saied travelled to Qatar in November 2020 to discuss with Emir Tamim the relevance of economic and political cooperation, which underlined the significance of the bilateral relations for both states. Conversely, Tamim has visited Tunisia four times since 2016.¹⁶⁴ Based on such close, personal links, Qatar has emerged as the top Gulf investor in Tunisia and the second-highest foreign investor (after France) in recent years¹⁶⁵ In contrast, Saudi Arabia significantly reduced its political and economic engagement in Tunisia after its close ally Zine el-Abidine Ben Ali was removed from power in 2011 and sought asylum in Saudi Arabia.¹⁶⁶ In the direct aftermath of Ben Ali's fall, Qatar considered Tunisia to be an interesting hub in which to foster economic diversification, establish closer business relations with Europe, and consolidate its image as an influential political actor through links with Ennahda.¹⁶⁷ Since then, Qatar

¹⁶⁰ Tarek Megerisi, *Libya's global civil war*, Policy Brief, European Council on Foreign Relations, June 26, 2019, https://ecfr.eu/publication/libyas_global_civil_war1/.

¹⁶¹ International Crisis Group, *Addressing the Rise of Libya's Madkhali-Salafis*, Report No. 200, April 25, 2019, <https://www.crisisgroup.org/middle-east-north-africa/north-africa/libya/addressing-rise-libyas-madkhali-salafis>.

¹⁶² Interview with a European researcher on Salafism in Libya, April 20, 2021.

¹⁶³ Interview with a Saudi political analyst, June 15, 2021.

¹⁶⁴ Interview with a Tunisian researcher, April 13, 2021.

¹⁶⁵ Anna L. Jacobs, *Qatar-Tunisia Ties Spur Competition with Gulf Arab Neighbors*, Arab Gulf Institute in Washington, December 14, 2020, <https://agsiw.org/qatar-tunisia-ties-spur-competition-with-gulf-arab-neighbors/>.

¹⁶⁶ Interview with a Saudi political analyst, June 15, 2021.

¹⁶⁷ Interview with a US researcher on the Maghreb and the Gulf states, May 12, 2021.

has shown significant political support for Ennahda, provided financial macroeconomic assistance, and initiated investments.¹⁶⁸ Since 2015, the Qatar Investment Authority (QIA) has been supporting Tunisia economically with large-scale investments, particularly in the real estate, tourism, banking, media, telecommunications, and petrochemical industries. In addition, Qatar promoted development cooperation and technical assistance through Qatari organisations such as the Silatech Foundation and Qatar Charity (QC), which have established close partnerships with Tunisian partner organisations. Furthermore, the Qatar Fund for Development (QFFD) founded local branches in Tunisia.¹⁶⁹ In 2016, 15 conventions and protocols on economic, financial, cultural, intellectual, educational and technological issues were signed between Qatar and Tunisia, with a focus on rural areas. At the Tunisian Investment Forum in 2016, Emir Tamim bin Hamad Al-Thani pledged US\$1.25 billion to support the Tunisian economy.¹⁷⁰ In contrast with Qatar, other Gulf states were less interested in economic engagement in Tunisia: Saudi Arabia, for instance, did not fully disburse its aforementioned pledge of US\$725 million at the Tunisian Investment Conference in 2016, and the UAE did participate (with a very small number of business people at the conference¹⁷¹ announcing only minor investments).¹⁷² With the construction of the new district of Tunis, i.e. Berges du Lac, and the rehabilitation of lake Lac du Tunis by Saudi Arabia in the 1980s, only two major projects were financed by the Kingdom during the era of Ben Ali.¹⁷³ Despite additional political promises by Saudi leadership to financially support Tunisia with US\$850 million in December 2018, several Tunisian observers contested the political will of Saudi Arabia to keep its promises. Between 2011 and 2017, the SFD provided loans totalling up to US\$550 million for energy projects (such as the Sousse power station, the Tunis–Dahmani gas pipeline, and a power plant in El Mornaguia), a 20,000-unit housing project, and technical and vocational training. The UAE provided only small grants amounting to US\$2–3 million and did not engage in comprehensive investment projects.

• **In general, Tunisia is considered by the Gulf states to be “too far away”, “irrelevant”, and “too close to Europe” when it comes to interesting business opportunities in infrastructure, energy or real estate.**¹⁷⁴ The UAE’s and Saudi Arabia’s expectations regarding generating high returns on investments from their economic engagement in Tunisia after the “Arab uprisings” did not bear fruit. As Tunisia constitutes a relatively small market dominated by European partners with “narrow strategic significance”, the volume of UAE and Saudi investments has remained signifi-

¹⁶⁸ Sebastian Sons and Inken Wiese, *The Engagement of Arab Gulf States in Egypt and Tunisia since 2011: Rationale and Impact*, DGAPanalyse Number 9, German Council on Foreign Relations, December 2015, https://dgap.org/system/files/article_pdfs/2015-09g.pdf.

¹⁶⁹ Anna L. Jacobs, *Qatar-Tunisia Ties Spur Competition with Gulf Arab Neighbors*, Arab Gulf Institute in Washington, December 14, 2020, <https://agsiw.org/qatar-tunisia-ties-spur-competition-with-gulf-arab-neighbors/>.

¹⁷⁰ Interview with a Tunisian researcher, April 13, 2021.

¹⁷¹ Youssef Cherif, *Tunisia’s Fledgling Gulf Relations*, Carnegie Endowment for International Peace, January 17, 2017, <https://carnegieendowment.org/sada/67703>.

¹⁷² <http://www.webmanagercenter.com/2016/11/28/399429/tunisia-2020-la-cession-de-la-part-des-emiratis-dans-le-capital-de-tunisie-telecom-sur-le-tapis/>.

¹⁷³ Sebastian Sons and Inken Wiese, *The Engagement of Arab Gulf States in Egypt and Tunisia since 2011: Rationale and Impact*, DGAPanalyse Number 9, German Council on Foreign Relations, December 2015, https://dgap.org/system/files/article_pdfs/2015-09g.pdf.

¹⁷⁴ Interview with a Saudi political analyst, June 15, 2021.

cantly low in comparison to others since the “Arab uprisings”.¹⁷⁵ In addition, Tunisia still suffers from an opaque and fragmented political system, time-consuming administrative procedures, lacking personal networks, and strong public opposition to Gulf investments, as shown by the influential role of trade unions that frame Gulf investments as a “Gulf buyout” of Tunisia.¹⁷⁶

• **During the blockade, media polarisation and demonisation intensified.**¹⁷⁷ Media outlets such as the Qatari-owned *Aljazeera*, the Saudi-run *Al-Arabiya*, and the UAE’s *Sky Arabia* provided respective political mouthpieces a platform through which to hijack inner-Tunisian public debates in favour of one of the respective opposing blocs. This was shown by the emerging conflict between Ghannouchi on the one hand and several political rivals (such as Fatma Miseddi, a former Nidaa Tounes member of parliament (MP), or Mohsen Marzouk¹⁷⁸, the former General Secretary of Nidaa Tounes) on the other hand. Both of whom challenged the legitimacy of Ennahda and were featured prominently in television shows broadcast by *Al-Arabiya* and *Sky Arabia*.¹⁷⁹ However, such a media war was not unique in the Tunisian case, but rather was similar to other parts of the Middle East.¹⁸⁰

• **Nevertheless, Tunisia did not find itself in the eye of the Gulf storm after the rift broke out.** In contrast with the “Arab uprisings”, during which Ennahda constituted an ideological challenge for the UAE and Saudi models of leadership, both Abu Dhabi and Riyadh feel that Ennahda is no longer a real threat to their own political legitimacy.¹⁸¹ Today, Ennahda follows a more pragmatic trajectory without promoting pan-Arab Islamist ideology, which makes the party less challenging to the UAE and Saudi Arabia.¹⁸² Against this backdrop, Saudi and UAE support for non-Islamist actors inside of Tunisia has decreased, as shown by the marginalisation of the more secular Nidaa Tounes, which was only considered a close partner of the UAE after it came to power in 2015.¹⁸³ However, the UAE mostly provided rhetorical support for Nidaa Tounes, only complementing it with minor financial incentives between 2013 and 2014.¹⁸⁴

¹⁷⁵ Sebastian Sons and Inken Wiese, *The Engagement of Arab Gulf States in Egypt and Tunisia since 2011: Rationale and Impact*, DGAPanalyse Number 9, German Council on Foreign Relations, December 2015, https://dgap.org/system/files/article_pdfs/2015-09g.pdf.

¹⁷⁶ *Ibid.*

¹⁷⁷ Youssef Cherif, *The Maghreb: A Battle Ground for the Intra-Sunni Cold War*, European Institute of the Mediterranean, June 2020, <https://www.imesd.org/publicacions-en/historic-de-publicacions/focus/165.-the-maghreb-a-battle-ground-for-the-intra-sunni-cold-war>.

¹⁷⁸ Interestingly, Marzouk was engaged for several years in the Qatar-based Arab Democracy Foundation and was considered to have close ties to former Qatari decision-makers such as Foreign Minister Khalid alAttiyah.

¹⁷⁹ Sarra Grira, *Tunisia: Battleground for the Gulf Media*, *Orient XXI*, July 8, 2020, <https://orientxxi.info/magazine/tunisia-battleground-for-the-gulf-media,4019>.

¹⁸⁰ Andreas Krieg, *The Weaponization of Narratives Amid the Gulf Crisis*, in: *Ibid.* (ed.), *Divided Gulf: The Anatomy of a Crisis*, London, 2019: pp. 91-108.

¹⁸¹ Interview with a Tunisian researcher, April 13, 2021.

¹⁸² Sebastian Sons and Inken Wiese, *The Engagement of Arab Gulf States in Egypt and Tunisia since 2011: Rationale and Impact*, DGAPanalyse Number 9, German Council on Foreign Relations, December 2015, https://dgap.org/system/files/article_pdfs/2015-09g.pdf.

¹⁸³ <https://www.atlanticcouncil.org/blogs/menasource/tunisian-elections-amid-a-middle-eastern-cold-war/>.

¹⁸⁴ Sarra Grira, *Tunisia: Battleground for the Gulf Media*, *Orient XXI*, July 8, 2020, <https://orientxxi.info/magazine/tunisia-battleground-for-the-gulf-media,4019>.

• **The more the Libyan conflict de-escalates, the more Tunisia's role as a facilitator of negotiation talks will diminish.**¹⁸⁵ In recent years, Tunisia has established itself as a host and hub for several warring parties involved in the Libyan context, which did provide the Tunisian government with an opportunity to portray itself as a constructive player engaged in conflict resolution based on positive neutrality and non-interference.¹⁸⁶ Based on the credo "Whatever happens in Libya does not stay in Libya", neighbouring Tunisia showed a serious commitment to fostering de-escalation, as the Libyan chaos directly hampered cross-border stability and accelerated arms trafficking and jihadist activities. As Abu Dhabi started to support Haftar, whereas Tunis backed the GNA, the UAE scaled back its economic and political influence in Tunisia. Thus, neighbouring Tunisia was regarded more as a gateway to Libya than as a recipient of direct political and financial assistance.¹⁸⁷ In a post-conflict Libya, it seems rather unlikely that Tunisia will continue to serve as such a "safe haven".¹⁸⁸ "As long as the rivalry between the Turkish axis and the UAE-Russian axis exist, which translates into proxy warfare in Libya, pressures from within and from without will threaten to derail the continuity of Tunisian diplomacy".¹⁸⁹

Following the official end of the Gulf schism in January 2021, as outlined in the Al Ula Declaration, the Maghreb states again are showing more interest in attracting Gulf investments and are reviving trade partnerships. However, scepticism remains because the Gulf states are lacking financial resources in times of the "double shock": the root causes of the Gulf divide have been neither openly discussed nor resolved.¹⁹⁰ No internal Gulf conflict resolution mechanism has been installed as of yet. Instead, the lift of the blockade was driven mostly by the Saudi assumption of presenting itself as a constructive player prior to the inauguration of Joe Biden as the new US President, whereas the UAE was less enthusiastic.

During his election campaign, Joe Biden explicitly criticised the Saudi leadership under MbS as being a "pariah", accusing him of being personally involved in the murder of Saudi journalist Jamal Khashoggi in Istanbul in October 2018, and alluding to his negative human rights record, and Saudi Arabia's engagement in Yemen.¹⁹¹ After his election, Biden exerted more pressure upon MbS when he announced his intention to communicate only with King Salman (rather than with the de facto leader) and stated that he would be "recalibrating" relations with

¹⁸⁵ Interview with a Tunisian researcher, April 2021.

¹⁸⁶ Habib M. Sayah, *Tunisia: Between Diplomatic Doctrine and Revolutionary Reality*, Sadeq Institute, March 17, 2021, <https://www.sadeqinstitute.org/short-reads/tunis-libya>.

¹⁸⁷ Sarra Grira, *Tunisia: Battleground for the Gulf Media*, *Orient XXI*, July 8, 2020, <https://orientxxi.info/magazine/tunisia-battle-ground-for-the-gulf-media,4019>.

¹⁸⁸ Sebastian Sons and Inken Wiese, *The Engagement of Arab Gulf States in Egypt and Tunisia since 2011: Rationale and Impact*, DGAPanalyse Number 9, German Council on Foreign Relations, December 2015, https://dgap.org/system/files/article_pdfs/2015-09g.pdf.

¹⁸⁹ Habib M. Sayah, *Tunisia: Between Diplomatic Doctrine and Revolutionary Reality*, Sadeq Institute, March 17, 2021, <https://www.sadeqinstitute.org/short-reads/tunis-libya>.

¹⁹⁰ <https://www.aljazeera.com/opinions/2021/1/6/the-gcc-after-al-ula>.

¹⁹¹ Dennis Ross and Robert Satloff, *Balancing Act: Biden Must Redefine the US-Saudi Relationship*, *The Washington Institute for Near East Policy*, February 25, 2021, <https://www.washingtoninstitute.org/policy-analysis/balancing-act-biden-must-redefine-us-saudi-relationship>; Yasmine Farouk and Andrew Leber, *What's Missing in the Recalibration of the U.S.-Saudi Relationship? People, Carnegie Endowment for International Peace*, March 4, 2021, <https://carnegieendowment.org/2021/03/04/what-s-missing-in-recalibration-of-u.s.-saudi-relationship-people-pub-84015>.

the long-term ally.¹⁹² Biden also stopped “offensive military support”¹⁹³ for Saudi Arabia in its military campaign in Yemen, and has shown a high commitment to reviving the 2015 nuclear deal with Iran (Joint Comprehensive Plan of Action, JCPOA), from which Trump withdrew in 2018. Following the release of the report from the US Office of the Director of National Intelligence (ODNI) which confirms the Crown Prince’s direct complicity in Khashoggi’s killing, Saudi Arabia was driven into a corner.¹⁹⁴ Since then, the Crown Prince has seemed to follow a more pragmatic and less assertive foreign policy as indicated by the rapprochement with Qatar, the release of several human rights activists, and a more conciliatory position towards negotiations on the JCPOA. The latter has been indicated by reports on direct talks between Iran and Saudi Arabia being facilitated by Iraq in order to seek a compromise in Yemen, which is of utmost priority for the Saudi leadership because the number of missile and drone attacks by the Houthis and supported by Iran has increased tremendously in recent months.¹⁹⁵

In the UAE, Qatar’s engagement in the Maghreb is still blamed for being pro-Islamist, aiming at undermining the Emirates’ efforts to develop strategic depth in the region: “Whereas the UAE’s engagement in North Africa is based on economic interest, Qatar follows ideological interests”, a UAE researcher stated.¹⁹⁶ Qatar aims to position itself again as a trustworthy mediator and facilitator that de-escalates between Iran and its Gulf rivals; this has raised mistrust from the UAE which still considers Qatar to be a regional rival in terms of economic and ideological rivalry. Thus, fault lines still exist and the situation could escalate again. Therefore, North African countries seem to follow a more cautious and reluctant approach towards the Gulf states, as they aim to prevent another period of Gulf contestation in the Maghreb, although they are in dire need of external assistance due to the fallout of the COVID-19 pandemic.

¹⁹² <https://www.reuters.com/article/us-mideast-usa-biden-idUSKBN2AG2AR>.

¹⁹³ <https://www.cnn.com/2021/02/04/biden-will-announce-end-of-us-support-for-offensive-operations-in-yemen.html>.

¹⁹⁴ Office of the Director of National Intelligence, *Assessing the Saudi Government’s Role in the Killing of Jamal Khashoggi*, February 11, 2021, <https://www.dni.gov/files/ODNI/documents/assessments/Assessment-Saudi-Gov-Role-in-JK-Death-20210226v2.pdf>.

¹⁹⁵ <https://www.ft.com/content/852e94b8-ca97-4917-9cc4-e2faef4a69c8>.

¹⁹⁶ Interview with a UAE researcher, April 26, 2021.

THE MAGHREB AS A THEATRE FOR REGIONAL COMPETITION: THE TURKISH DIMENSION

In recent years, Turkey has emerged as the most relevant non-Arab regional player in the Maghreb, which also shows strong implications for the Gulf states' engagement in the region.¹⁹⁷ From a Turkish perspective, the Maghreb constitutes a significant part of Turkey's "zone of influence"¹⁹⁸ (as indicated by Turkish–African trade at an estimated US\$25.3 billion in 2020¹⁹⁹, and several trade agreements with Tunisia in 2005²⁰⁰ and Morocco²⁰¹ and Algeria²⁰² in 2006). Turkey's geostrategic objective of gaining regional influence by projecting military power played out significantly in the Libyan context, which is closely interconnected with the conceptual trajectory of "blue homeland" (*mavi vatan*). This concept refers to protecting national security through maritime investments.²⁰³ Such an interventionist strategy intensifies regional competition with the UAE and Saudi Arabia to a lesser extent: from Abu Dhabi's and Riyadh's perspective, Turkey is regarded as the main opponent in terms of ideological, economic and geostrategic supremacy in the Maghreb.²⁰⁴ The UAE follows an emerging detente between Turkey and North African states with mistrust, as it is worried about the rising impact of Turkey in countries of strategic interest in the Mediterranean and beyond. However, as Turkey is suffering from financial and economic constraints accelerated by COVID-19, most of the Gulf monarchies find themselves in a more comfortable situation in terms of financial capacities.²⁰⁵

¹⁹⁷ Anna L. Jacobs, *Regional and Global Power Competition Deepens Fault Lines Across the Southern Mediterranean*, Arab Gulf Institute in Washington, October 21, 2020, <https://agsiw.org/regional-and-global-power-competition-deepens-fault-lines-across-the-southern-mediterranean/>.

¹⁹⁸ Dalia Ghanem, *Ankara's Maghreb Moment*, Carnegie Middle East Center, May 4, 2021, <https://carnegie-mec.org/diwan/84460>.

¹⁹⁹ <https://www.mfa.gov.tr/turkey-africa-relations.en.mfa#:~:text=Our%20total%20trade%20volume%20with,reached%2010%20billion%20%24%20in%202020>.

²⁰⁰ <https://www.trade.gov.tr/free-trade-agreements/tunisia>.

²⁰¹ <https://www.trade.gov.tr/free-trade-agreements/morocco>.

²⁰² <https://www.mfa.gov.tr/relations-between-turkey-algeria.en.mfa>.

²⁰³ International Crisis Group, *Turkey Wades into Libya's Troubled Waters*, Report No. 257, April 30, 2020, <https://www.crisisgroup.org/europe-central-asia/western-europemediterranean/turkey/257-turkey-wades-libyas-troubled-waters>.

²⁰⁴ <https://www.al-monitor.com/originals/2018/08/turkey-subtle-expansion-in-africa.html>.

²⁰⁵ Interview with a UAE political analyst, April 26, 2021.

Libya

• **As the most significant example, Libya serves as the main hotspot for the Turkish–UAE power struggle.** Both countries' military engagement in Libya is driven not only by diverging ideological positions but also in terms of geostrategic relevance, as Libya serves as a gateway to the Eastern Mediterranean. The UAE promoted an anti-Islamist narrative in order to win support among European countries such as France for concerted efforts against Turkey.²⁰⁶ In recent years, France has provided large-scale military and financial support to Haftar.²⁰⁷ Generally, Turkey and the UAE follow similar goals, as Libya has developed as a centre of both countries' power projection in the Eastern Mediterranean, which is related to control over strategic maritime infrastructure and access to waterways, energy resources, pipelines, and hard military power.²⁰⁸ Turkey, in contrast with other external players, also engaged heavily in Libya in order to preserve its longstanding investments which started under al-Ghaddafi: by 2010, the volume of Turkish investments in Libya's construction sector amounted to US\$20 billion.²⁰⁹

• **In the Eastern Mediterranean, Turkey felt increasingly encircled by several opponents, such as Israel, Cyprus, Greece, and Egypt supported by France and the UAE, competing for oil and gas resources and energy trade routes.** Turkey was excluded from the East Mediterranean Gas Forum (EMGF) in 2019, which aimed to have the members join forces in exploiting deep-sea gas resources and exporting them to Europe via the EastMed pipeline. From a Turkish perspective, the competition with the EMGF and, in particular, with Greece builds on the dire interest not only in exploiting the Eastern Mediterranean gas fields, but also in the disputed maritime status of Cyprus between Greece and Turkey,²¹⁰ adding "a sovereignty dimension to the issue beyond the regional scramble for natural resources".²¹¹ Thus, such arrangements are considered by the Turkish President Recep Tayyip Erdoğan government to be an "anti-Turkey club".²¹² Driven by economic woes in times of rising inflation and the negative implications of COVID-19, Turkey considers access to offshore gas resources to be essential for its economic stability and energy security.²¹³ This year, the UAE will be granted observer status in EMGF, as the construction of the new pipeline could offer Abu Dhabi an opportunity to compete with Qatar in terms of the gas supply to Europe.

²⁰⁶ Asli Aydintaşbaş and Cinzia Bianco, *Useful enemies: How the Turkey-UAE rivalry is remaking the Middle East*, Policy Brief, European Council on Foreign Relations, March 15, 2021, <https://ecfr.eu/publication/useful-enemies-how-the-turkey-uae-rivalry-is-remaking-the-middle-east/>.

²⁰⁷ Karim Mezran and Federica Saini Fasanotti, *France must recognize its role in Libya's plight*, Atlantic Council, July 21, 2020, <https://www.atlanticcouncil.org/blogs/new-atlanticist/france-must-recognize-its-role-in-libyas-plight/>.

²⁰⁸ <https://www.politico.eu/article/how-turkey-militarized-foreign-policy-azerbaijan-diplomacy/>.

²⁰⁹ Bilgehan Öztürk, *Turkey: The Geo Political Knot*, Sadeq Institute, March 17, 2021, <https://www.sadeqinstitute.org/short-reads/turkey-libya>.

²¹⁰ European Council on Foreign Relations, *Deep Sea Rivals: Europe, Turkey, and New Eastern Mediterranean Conflict Lines*, May 2020, https://ecfr.eu/special/eastern_med.

²¹¹ Bilgehan Öztürk, *Turkey: The Geo Political Knot*, Sadeq Institute, March 17, 2021, <https://www.sadeqinstitute.org/short-reads/turkey-libya>.

²¹² European Council on Foreign Relations, *Deep Sea Rivals: Europe, Turkey, and New Eastern Mediterranean Conflict Lines*, May 2020, https://ecfr.eu/special/eastern_med.

²¹³ International Crisis Group, *Turkey Wades into Libya's Troubled Waters*, Report No. 257, April 30, 2020, <https://www.crisisgroup.org/europe-central-asia/western-europemediterranean/turkey/257-turkey-wades-libyas-troubled-waters>.

It could further prevent Turkey from becoming an “energy catalyst in the network world order”, which would undermine the UAE’s efforts as a global maritime and energy superpower.²¹⁴ Strategically, the UAE seeks to hit two birds with one stone, as it can promote itself as the most valuable and reliable economic partner in the region and, at the same time, isolate its main regional competitor, i.e. Turkey. Therefore, Libya constitutes a main theatre in such a Mediterranean rivalry.

• **Against this backdrop, Turkey and the UAE consider Libya to be a relevant gateway in protecting economic interests in the Eastern Mediterranean.**²¹⁵ Therefore, both have increased their military activities in Libya on opposing sides. Furthermore, based on the *mavi vatan* concept, Turkey concluded a Maritime and Security Memorandum of Understanding (MoU) with the government in Tripoli in 2019 on the delimitation of maritime jurisdiction areas in the Mediterranean, which aims to hamper construction of the EastMed pipeline, establish joint Economic Exclusive Zones (EEZs) with Libya, and intensify exploration of energy sources near the maritime borders of Libya.²¹⁶ The MoU should, however, not be interpreted as a pro-Turkish partisanship by the GNU under Prime Minister Abdul Hamid Dbeiba, but rather as an interest in economic cooperation with Turkey. In addition, such a deal aims to prevent Turkey’s rivals Israel, Cyprus and Greece from gaining the upper hand in the Eastern Mediterranean.²¹⁷

Tunisia

• **In Tunisia, Erdoğan’s AKP Party (Adalet ve Kalkınma Partisi, Justice and Development Party) is considered by many Ennahda supporters to be a natural partner in terms of Islamist ideology.** Such an assumption is also based on a personal relationship between Ghanouchi and the Turkish President. Thus far, bilateral trade has been comparatively low, but is expected to increase from US\$1.25 billion in 2019 to US\$2 billion in 2021.²¹⁸ Furthermore, Turkey considered Tunisia to be a gateway for its military and political engagement in Libya.

• **Turkey shows an interest in enhancing security cooperation with Tunisia.** In December, Turkey offered Tunisia a loan worth US\$150 million to purchase Turkish military equipment.²¹⁹

²¹⁴ Asli Aydintaşbaş and Cinzia Bianco, *Useful enemies: How the Turkey-UAE rivalry is remaking the Middle East*, Policy Brief, European Council on Foreign Relations, March 15, 2021, <https://ecfr.eu/publication/useful-enemies-how-the-turkey-uae-rivalry-is-remaking-the-middle-east/>.

²¹⁵ Anna L. Jacobs, *Resolution of Gulf Rift Not Likely to Mend Fault Lines in North Africa*, Arab Gulf Institute in Washington, January 21, 2020, <https://agsiw.org/resolution-of-gulf-rift-not-likely-to-mend-fault-lines-in-north-africa/>.

²¹⁶ International Crisis Group, *Turkey Wades into Libya’s Troubled Waters*, Report No. 257, April 30, 2020, <https://www.crisisgroup.org/europe-central-asia/western-europemediterranean/turkey/257-turkey-wades-libyas-troubled-waters>.

²¹⁷ Said Saddiki, *The New Turkish Presence in North Africa: Ambitions and Challenges*, Med Dialogue Series No. 33, Regional Program Political Dialogue South Mediterranean, Konrad Adenauer Foundation, December 2020, <https://www.kas.de/documents/282499/282548/The+New+Turkish+Presence+in+North+Africa.pdf/1ef5bc1d-f900-a9b5-6fb0-619c94ec37b1?version=1.0&t=1607419637085>.

²¹⁸ Interview with a Tunisian economic expert, April 6, 2021.

²¹⁹ <https://www.trt.net.tr/francais/economie/2020/12/24/la-turquie-signe-avec-la-tunisie-un-accord-de-150-millions-de-dollars-dans-le-domaine-de-la-defense-1551354>.

Algeria

• **In economic terms, Turkey has intensively entered the Algerian market, which undermines the Gulf states' complicated efforts to win a foothold in the country.** In 2020, Algeria was the second-largest trade partner of Turkey in the Maghreb (with a trade volume of US\$4.2 billion and a total investment volume of US\$3.5 billion).²²⁰ During Erdoğan's last trip to Algeria in 2020, it was further agreed by both governments to increase the bilateral trade volume to US\$5 billion²²¹ and to construct a petrochemical plant in Adana.²²² After 2006, 2013 and 2014, it was his fourth visit to Algeria, which indicates the high-ranking personal engagement to boost bilateral cooperation. In turn, Algeria serves as Turkey's fourth-largest supplier of liquefied natural gas (LNG).²²³ Such an economic partnership also aims to foster Algerian–Turkish detente regarding the joint endorsement of the GNA in Libya and the support for the Palestinian cause which further intensifies the contestation with the UAE.²²⁴

Morocco

• **In contrast with Algeria, Turkey's influence in Morocco is rather minimal, as the Moroccan leadership follows a pragmatic inclusion of the Islamist Justice and Development Party (JDP)225 in the government.**²²⁶ Thus, it aims to circumvent closer pro-Islamist Turkish entanglement, which could undermine the fragile internal political power balance. Despite tensions with Saudi Arabia in recent years, Morocco is politically, economically and culturally more closely tied to the Gulf states than to Turkey. In terms of FDI, the UAE developed as the second-largest foreign investor with 7.2%, after France (34.8%), in 2019. Unlike in 2017, with a share of 6.1%, Saudi Arabia found itself ranked only seventh with 3.0% two years later after the political tensions had hampered business opportunities.²²⁷ As the diplomatic tensions of Saudi Arabia and the UAE with Turkey reached a negative climax in autumn 2020, when both countries started to impose a boycott upon Turkish products, Morocco followed suit by introducing a 90% additional customs duty on Turkish goods in October,²²⁸ violating the bilateral free trade agreement (FTA) which entered into force in 2006.²²⁹

²²⁰ <https://www.elwatan.com/edition/economie/la-turquie-veut-un-accord-de-libre-echange-2-24-11-2020>.

²²¹ <https://www.dailysabah.com/economy/2020/01/26/turkey-to-increase-bilateral-trade-volume-with-algeria-to-5-billion>.

²²² <https://www.hurriyetdailynews.com/turkey-algeria-aim-for-5-billion-trade-151454>.

²²³ [https://seenews.com/news/turkey-extends-natgas-supply-deal-with-algeria-report-685100#:~:text=Algeria%20is%20Turkey's%20fourth%20largest,polypropylene%20\(PP\)%20in%20Turkey](https://seenews.com/news/turkey-extends-natgas-supply-deal-with-algeria-report-685100#:~:text=Algeria%20is%20Turkey's%20fourth%20largest,polypropylene%20(PP)%20in%20Turkey).

²²⁴ <https://www.al-monitor.com/originals/2020/11/turkey-algeria-morocco-western-sahara-conflict-tests-ties.html#ixzz6eh9ZS2x>.

²²⁵ Yasmina Abouzohour, *Progress and missed opportunities: Morocco enters its third decade under King Mohammed VI*, Brookings, July 29, 2020, <https://www.brookings.edu/research/progress-and-missed-opportunities-morocco-enters-its-third-decade-under-king-mohammed-vi/>.

²²⁶ Mohammed Masbah, *His Majesty's Islamists: The Moroccan Experience*, Carnegie Middle East Center, March 23, 2015, <https://carnegie-mec.org/2015/03/23/his-majesty-s-islamists-moroccan-experience-pub-59442>.

²²⁷ https://santandertrade.com/en/portal/establish-overseas/morocco/foreign-investment?url_de_la_page=%2Fen%2Fportal%2Festablish-overseas%2Fmorocco%2Fforeign-investment&&actualiser_id_banque=oui&id_banque=0&memoriser_chaix=memoriser.

²²⁸ <https://www.morocroworldnews.com/2019/11/287406/morocco-walk-out-free-trade-deal-turkey/>.

²²⁹ <https://www.trade.gov.tr/free-trade-agreements/morocco>.

THE MAGHREB AS A THEATRE FOR NEW GLOBAL ACTORS' INTERVENTIONISM: THE RUSSIAN AND CHINESE DIMENSION

In recent years, Russia and China have largely extended their economic, political and security engagement in North Africa, which indicates a significant shift from traditional post-colonial European powers and the US towards new actors, while also revealing “tensions between Gulf states and traditional allies like the United States, as well as new points of convergence with U.S. rivals like China and Russia”.²³⁰

Russia and the Gulf states

Although Gulf–Russia cooperation is driven neither by a strategic alliance nor by a mutual political or ideological understanding, it is built on a joint calculation of pragmatism: as all Gulf states seek to foster security diversification, Russia serves as a potential supplier in terms of military equipment. In times of US entrenchment from the Middle East and North Africa, the UAE and Saudi Arabia utilise new partnerships with Russia to pursue their overarching “neo-mercantilist”²³¹ objective in the region and beyond.

Libya

- **Libya serves as the most outstanding example of this strategic approach:**²³² here, the closest cooperation in the Maghreb exists between Russia and the UAE, with both establishing close ties with Haftar in terms of security coordination.²³³ Russia financially and tactically supported Haftar,²³⁴ sent mercenaries to Libya,²³⁵ and vetoed a UN Security Council Resolution

²³⁰ Anna L. Jacobs, *Regional and Global Power Competition Deepens Fault Lines Across the Southern Mediterranean, Arab Gulf Institute in Washington, October 21, 2020*, <https://agsiw.org/regional-and-global-power-competition-deepens-fault-lines-across-the-southern-mediterranean/>.

²³¹ <https://www.trtworld.com/opinion/the-uae-s-grand-strategy-is-shaping-a-new-regional-order-46322>.

²³² Samuel Ramani, *Russia: From Retreat to Resurgence*, Sadeq Institute, March 17, 2021, <https://www.sadeqinstitute.org/short-reads/russia-libya>.

²³³ *Ibid.*

²³⁴ <https://www.nytimes.com/2019/11/05/world/middleeast/russia-libya-mercenaries.html>.

²³⁵ <https://www.aa.com.tr/en/africa/libya-says-russian-mercenaries-seen-inside-sirte-school/2033483>.

against the pro-Haftar al-Kaniyat militia.²³⁶ The UN estimated that the number of Syrian fighters alone increased from 4,000 in December 2019 to 13,000 in 2020.²³⁷

• **For years, the UAE diversified its security partnerships away from the US and Europe in favour of Russia under Abu Dhabi's Crown Prince Muhammad bin Zayid:**²³⁸ he strongly promoted the army's modernisation by signing large-scale arms purchases and defence pacts with a variety of powers – such as Russia – to preserve the national security of the UAE. This kind of strategic thinking perpetuates in Libya. Based on local “surrogate networks” and the apparent funding of the Russian mercenary group Wagner,²³⁹ case-to-case alliances on a tactical, procedural and technical level with Russia are constituting a growing pillar of the UAE's politics in the Middle East and North Africa: the UAE provided Haftar with armed drones, air-defence methods, laser-guided bombs, and assault helicopters, while it also coordinated its air cargo flights with Russia in 2019 and 2020.²⁴⁰ In establishing a Libyan military footprint together with Russia, it is clear that Abu Dhabi considers Libya to be a gateway, as a “connecting link”,²⁴¹ between North Africa, Western Africa, the Horn of Africa, the Indian Ocean, and the Red Sea. In cooperation with Russia, the UAE aims to preserve its military presence (“a deep state”²⁴²) in Eastern Libya, which has been established over the last years: “Without the loyalty of the armed forces, the GNU cannot stabilize the country. Such forces are still largely controlled and supported by the UAE”.²⁴³ Thus, even under the GNU, the UAE seeks to play an influential role as both a stakeholder and a potential spoiler in post-conflict Libya. Its engagement in Libya further exemplifies the UAE's approach not only to gaining leverage in the great power game, but also to serving as a “middleman”²⁴⁴ for external players such as Russia. In addition, the UAE's military engagement in Libya was extremely costly in terms of its international reputation, as Abu Dhabi was oftentimes criticised for weapon trafficking and its financial support for several mercenary groups. In March 2021, the UN Panel of Experts accused the UAE of establishing “air bridges” between the UAE and Western Egypt, as well as between Eastern Libya and Russia to provide arms and funding to its surrogates in Eastern Libya through the Syrian Arab Republic, whereas Turkey channelled military support to the GNA.²⁴⁵ The UN Panel further confirmed regular violations of the arms embargo from 2011 by most of the conflict parties, such as the UAE, Russia, Egypt, Jordan, Turkey, and the Syrian Arab Republic.

²³⁶ <https://www.reuters.com/article/us-libya-security-un-idUSKBN28101P>.

²³⁷ <https://documents-dds-ny.un.org/doc/UNDOC/GEN/N21/037/72/PDF/N2103772.pdf?OpenElement>.

²³⁸ Peter Salisbury, *Risk Perception and Appetite in UAE Foreign and National Security Policy*, Research Paper, Middle East and North Africa Programme, Chatham House, July 2020, <https://www.chathamhouse.org/sites/default/files/2020-07-01-risk-in-uae-salisbury.pdf>.

²³⁹ Amy Mackinnon and Jack Detsch, *Pentagon Says UAE Possibly Funding Russia's Shadowy Mercenaries in Libya*, *Foreign Policy*, November 30, 2020, <https://foreignpolicy.com/2020/11/30/pentagon-trump-russia-libya-uae/>. <https://warisboring.com/enik-princes-mercenaries-are-bombing-libya/>.

²⁴⁰ <https://www.wsj.com/articles/u-a-e-boosted-arms-transfers-to-libya-to-salvage-warlords-campaign-u-n-panel-finds-11601412059>.

²⁴¹ Interview with a European researcher on the Gulf states' role in Libya, April 26, 2021.

²⁴² *Ibid.*

²⁴³ Interview with a Libyan researcher, April 28, 2021.

²⁴⁴ Interview with a UAE analyst, April 26, 2021.

²⁴⁵ <https://documents-dds-ny.un.org/doc/UNDOC/GEN/N21/037/72/PDF/N2103772.pdf?OpenElement>.

• **Furthermore, tensions between the UAE and Haftar have intensified in recent months, which has put the UAE in a dilemma:** on the one hand, Abu Dhabi's concerns surrounding Haftar's future role in a post-conflict Libya have grown since his military offensive on Tripoli failed. On the other hand, Haftar still constitutes the main local surrogate for the UAE inside of Libya: "The UAE does not have another alternative".²⁴⁶ In partnering with Russia, the UAE takes into consideration such reputational risks by following a "leading from behind" approach without troops on the ground,²⁴⁷ whereas Russian military actions become more visible. Such an approach reflects a broader "UAE momentum"²⁴⁸ of its regional engagement based on a cost-benefit calculation which aims to foster foreign policy diversification:²⁴⁹ "The long term strategic thinking of the UAE remains intact as Emirati leaders are not abandoning the decisive and proactive foreign policy of the past decade".²⁵⁰

Algeria

• **Historically, Algeria served as one of the main security partners of the Soviet Union:**²⁵¹ by the end of the 1970s, 90% of Algerian military equipment was being provided by the Soviet Union. Between 1962 and 1989, the Soviet Union provided Algeria with aircraft, tanks, ships, and ammunition totalling US\$11 billion.²⁵² Today, Russia still serves as the third-largest military partner at 14%, after India (25%) and China (16%). In this regard, more than 50% of Russian military deliveries to Africa are provided to Algeria.²⁵³ Further areas of joint cooperation are the mining and cybersecurity sectors, as well as energy.²⁵⁴ Thus far, such engagement has been driven by pragmatism (rather than by contestation): as the UAE and Russia are coordinating efforts in Libya, both also seek to extend their cooperation in Algeria. However, such efforts are hampered by the pro-Moroccan UAE support in the Western Saharan conflict, whereas no substantial joint initiatives between Russia on the one hand and Saudi Arabia or Qatar on the other hand have been launched as of yet.

China and the Gulf states

From a Chinese perspective, both the Gulf states and the Maghreb are key economic and security partners, which is reflected in the increasing volume of trade and investment in recent years. With the introduction of the BRI in 2013, the Middle East and North Africa have

²⁴⁶ Interview with a European security analyst on Libya, April 20, 2021.

²⁴⁷ Interview with a UAE analyst, April 26, 2021.

²⁴⁸ Abdulkhaleq Abdulla, *The Rise of the United Arab Emirates*, *The Cairo Review of Global Affairs*, spring 2021, <https://www.thecaireview.com/main-home-page/the-rise-of-the-united-arab-emirates/>.

²⁴⁹ Interview with a European political analyst, April 20, 2021.

²⁵⁰ Abdulkhaleq Abdulla, *The Rise of the United Arab Emirates*, *The Cairo Review of Global Affairs*, spring 2021, <https://www.thecaireview.com/main-home-page/the-rise-of-the-united-arab-emirates/>.

²⁵¹ <https://www.middleeastmonitor.com/20180720-algeria-has-bought-half-of-the-russian-weapons-sold-in-africa/>.

²⁵² <https://www.cairn.info/revue-politique-etrangere-2015-3-page-57.htm>.

²⁵³ Adlene Mohammadi, *Russie-Algérie: un partenariat flexible et pragmatique*, *Foundation Mediterranean D'études Stratégiques*, December 2, 2020, <https://fmes-france.org/russia-algeria-a-flexible-and-pragmatic-partnership-by-adlene-mohammadi/>.

²⁵⁴ May Barth, *The Algeria-Russia Strategic Partnership: An Assertive Geopolitical Move? Analysis*, *Brussels International Center*, March 22, 2019.

become strategic partners in China's "partnership diplomacy",²⁵⁵ as indicated by the signing of comprehensive strategic partnerships (CSPs) and strategic partnerships (SPs)²⁵⁶ with Saudi Arabia, Qatar, the UAE, and Kuwait on the Gulf Arab side and with Algeria and Morocco on the North African side (see Table 4). Thus far, only declarations of intent have been signed with Tunisia and Libya, but no formal agreements.

The BRI includes 80 countries and is expected to have a total investment volume of US\$1 trillion. Within the framework of the BRI, the Forum on China-Africa Cooperation (FOCAC) and the China-Arab States Cooperation Forum (CASCF) serve as the most important forums for Chinese cooperation with North Africa and the Gulf states, while the "1 + 2 + 3 pattern" of the 2016 Arab Policy Paper brought about closer cooperation in the energy sector, infrastructure, trade and investment, nuclear energy, space satellites, and renewable energy.²⁵⁷

Table 4: Chinese comprehensive strategic partnerships (CSPs) and strategic partnerships (SPs) with North African and Gulf countries

Algeria	Comprehensive Strategic Partnership	2014
Kuwait	Strategic Partnership	2018
Morocco	Strategic Partnership	2016
Oman	Strategic Partnership	2018
Qatar	Strategic Partnership	2014
Saudi Arabia	Comprehensive Strategic Partnership	2016
UAE	Comprehensive Strategic Partnership	2018

Source: <https://www.atlanticcouncil.org/in-depth-research-reports/report/china-s-changing-role-in-the-middle-east-2/>.

For the Gulf states, China has become the most important economic partner in terms of fossil, nuclear and renewable energy, maritime and digital infrastructure, knowledge transfer, cybersecurity, construction, and cultural exchange.²⁵⁸ Overall, the Gulf supplies more than 40% of China's oil imports, and Qatar delivers more than 20% in gas to China.²⁵⁹ "Given the GCC nations' dependency on oil exports, the Gulf is increasingly tied to China economically, especially in light of the pandemic and the global economic downturn".²⁶⁰

²⁵⁵ Georg Strüver, *China's Partnership Diplomacy: International Alignment Based on Interests or Ideology*, in: *The Chinese Journal of International Politics*, vol. 10, no. 1 (spring 2017): pp. 31-65.

²⁵⁶ *Ibid.*

²⁵⁷ Jonathan Fulton, *China's changing role in the Middle East*, Atlantic Council, June 5, 2019, <https://www.atlanticcouncil.org/in-depth-research-reports/report/china-s-changing-role-in-the-middle-east-2/>.

²⁵⁸ Camille Lons, Jonathan Fulton, Degang Sun and Naser Al-Tamimi, *China's great game in the Middle East*, Policy Brief, European Council on Foreign Relations, October 21, 2019, https://ecfr.eu/publication/china_great_game_middle_east/.

²⁵⁹ Christian Le Miere, *Increasing mutual dependence in Sino-Gulf relations is changing the strategic landscape*, Atlantic Council, May 11, 2020, <https://www.atlanticcouncil.org/blogs/energysource/increasing-mutual-dependence-in-sino-gulf-relations-is-changing-the-strategic-landscape/>.

²⁶⁰ Mohammed Soliman, *The coming US-China cold war: The view from the Gulf*, Middle East Institute, March 15, 2021, <https://www.mei.edu/publications/coming-us-china-cold-war-view-gulf>.

Such an observation holds specifically true for Saudi Arabia, as China offers tremendous opportunities for economic diversification:²⁶¹ the Saudi leadership has to attract FDI from all parts of the world in order to realise the ambitious plans of “Vision 2030” and create jobs for the young generations. In addition, China does not criticise Saudi Arabia for its negative human rights record or its engagement in Yemen. Thus, the Saudi economy has reorientated itself towards China in recent years: between 1990 and 2019, the bilateral trade volume skyrocketed from less than US\$500 million to more than US\$78 billion. In 2014, China replaced the US as Saudi Arabia’s main trading partner. Between 2018 and 2019, the trade volume increased by more than 23%, whereas Saudi exports to China jumped by 18% and Chinese imports to 36.5% during the same period (see Table 5).

Table 5: Trade between Kingdom of Saudi Arabia and China

	Volume of Trade Rank	Exports (in %)	Imports (in %)
2010	3	12	12
2011	2	12	13
2012	2	13	13
2013	2	13	12
2014	1	13	13
2015	1	12	14
2016	1	12	14
2017	1	12	15
2018	1	13	16

Source: https://www.stats.gov.sa/sites/default/files/trade_2018.pdf.

Logistically, China shows a dire interest in improving its maritime networks by investing in Gulf industrial zones linked to ports such as the Jazan City for Primary and Downstream Industries (JCPDI) in the Red Sea. Conversely, Saudi Arabia supported Pakistan with US\$16 billion in loans and investments in the China-Pakistan Economic Corridor (CPEC) in order to facilitate and complement Saudi Aramco’s joint projects with Chinese companies and to foster its expansion to South Asia.

Although on a comparatively low level, bilateral security cooperation has also emerged in recent years, as Saudi Arabia reportedly purchased intercontinental ballistic missiles, precision-guided rockets, and drones from China.²⁶² Furthermore, both organised anti-terror training in 2016²⁶³ and naval exercises in 2019.²⁶⁴ In 2017, China established its first overseas

²⁶¹ Jonathan Fulton, *Strangers to Strategic Partners: Thirty Years of Sino-Saudi Relations*, Atlantic Council, August 25, 2020, <https://www.atlanticcouncil.org/in-depth-research-reports/report/strangers-to-strategic-partners-thirty-years-of-sino-saudi-relations>.

²⁶² <https://www.defensenews.com/opinion/2021/04/23/chinas-surprising-drone-sales-in-the-middle-east/>.

²⁶³ <https://www.reuters.com/article/us-china-saudi-security-idUSKCN12R0FD>.

²⁶⁴ <https://www.arabnews.com/node/1594821/saudi-arabia>.

military base in Djibouti and deployed military specialists to Pakistan's Gwadar, which is also of both strategic and security interest for Saudi Arabia.²⁶⁵ Thus far, Sino–Saudi cooperation has not materialised significantly in North Africa, but the potential for future project implementation seems to be high.

Such an extended partnership could also serve the Saudi interest in counterbalancing rising Sino–Iranian cooperation,²⁶⁶ as both Iran and China signed a 25-year agreement regarding political and economic cooperation with a total estimated volume of US\$400 billion in March 2021.²⁶⁷ It is further planned to station 5,000 Chinese security and military experts on Iranian territory, allowing China to expand its presence in the Gulf.²⁶⁸ Against this backdrop, Riyadh considers China's conciliatory and pragmatic ties with Iran to be counterproductive for regional stability, but would prefer an economic partnership with China over Iranian isolation.

For the UAE, China also constitutes one of the major economic and strategic partners²⁶⁹ and an integral component of the BRI (as was shown by the Chinese US\$300 million investment in Khalifa Port).²⁷⁰ In its cooperation with China, the UAE aims to achieve economic diversification and the protection of vital trade corridors.²⁷¹ In the past, economic relations mostly focused on energy and infrastructure, but there has been a continuous intensification of more activities in cybersecurity, artificial intelligence (AI), communications technology, maritime cooperation, health diplomacy and joint vaccination production in times of COVID-19,²⁷² as well as knowledge transfer.

Interlinked with China's strategic cooperation with the Gulf states, North Africa offers China an excellent opportunity to further push its own economic, geostrategic and security ambitions while, at the same time, establishing a nexus with the Gulf.²⁷³ The more the political importance of Europe as a partner of North Africa declines due to its internal conflicts (such as Brexit) and damaged reputation in the wake of the "Arab Spring", the more China will fill this vacuum.²⁷⁴ Overall, the trade volume between China and the Maghreb increased from US\$1.8 billion in 1992 to US\$204.6 billion in 2018. Between 2005 and 2019, the volume

²⁶⁵ <https://www.reuters.com/article/us-china-djibouti-idUSKBN1AH3E3>.

²⁶⁶ Julia Gurol and Jacopo Scita, *China's Persian Gulf strategy: Keep Tehran and Riyadh content*, Atlantic Council, January 24, 2020, <https://www.atlanticcouncil.org/blogs/menasource/chinas-persian-gulf-strategy-keep-tehran-and-riyadh-content/>.

²⁶⁷ <https://www.nytimes.com/2021/03/27/world/middleeast/china-iran-deal.html>.

²⁶⁸ <https://www.arabnews.com/node/1834281/opinion>.

²⁶⁹ <https://www.middleeasteye.net/opinion/why-security-partnership-between-abu-dhabi-and-beijing-growing>.

²⁷⁰ Eleonora Ardemagni, *Gulf Powers: Maritime Rivalry in the Western Indian Ocean*, Analysis No. 321, April 2018.

²⁷¹ Peter Salisbury, *Risk Perception and Appetite in UAE Foreign and National Security Policy*, Research Paper, Middle East and North Africa Programme, Chatham House, July 2020, <https://www.chathamhouse.org/sites/default/files/2020-07-01-risk-in-uae-salisbury.pdf>.

²⁷² <https://www.reuters.com/world/middle-east/new-abu-dhabi-plant-manufacture-covid-19-vaccine-chinas-sinopharm-2021-03-29/>.

²⁷³ Christine Wormuth, *Russia and China in the Middle East: Implications for the United States in an Era of Strategic Competition*, Testimony presented before the House Foreign Affairs Subcommittee on Middle East, North Africa and International Terrorism on May 9, 2019, RAND Corporation, <https://www.rand.org/pubs/testimonies/CT511.html>.

²⁷⁴ Adel Abdel Ghafar and Anna L. Jacobs, *China in the Mediterranean: Implications of expanding Sino-North Africa relations*, Brookings, July 2020, <https://www.brookings.edu/research/china-in-the-mediterranean-implications-of-expanding-sino-nor-th-africa-relations/>.

of Chinese investment in the Maghreb increased from US\$600 million to US\$29.6 billion, US\$23.6 billion of which went to Algeria alone.²⁷⁵ Thus, China is pursuing a neutral approach to regional conflicts, which is welcomed by most Gulf and North African states, as an alternative to the approach adopted by Europe and the US that is considered to be more interventionist by Gulf and Maghreb countries. This is shown, for example, in Libya, wherein China officially supports the GNA but has otherwise not interfered in the conflict militarily.²⁷⁶

However, an imbalance still exists in the China–Gulf–Maghreb relationship: in contrast with the Gulf states, China replaced France as Algeria’s most important economic partner in 2013 and has since become the most vital investor,²⁷⁷ but in Morocco and Tunisia China cannot (yet) compete with its most important European trading partners, i.e. Spain and France. China is particularly active on the hard and soft power level and invests in trade, infrastructure development, ports, shipping, financial cooperation, tourism, and manufacturing. In Algeria, for instance, China has mainly invested in large infrastructure projects such as Algiers Opera House, the Sheraton Hotel, the Great Mosque of Algiers, and the East–West Highway, and in Morocco in the Atlantic Free Zone in Kenitra, Casablanca Finance City, the Noor 2 and Noor 3 solar parks,²⁷⁸ and the Tanger Med Port Complex. In 2006, a consortium consisting of the China Rail Construction Corporation and the China International Trust and Investment Corporation were awarded construction of the western and central sections of the East–West Highway with a total volume of EUR5.5 billion.²⁷⁹ The regional headquarters of communications giant Huawei are located in Morocco.²⁸⁰ In Tunisia, on the other hand, Chinese involvement is still in the early stages in the areas of information and communications technology (ICT), infrastructure, tourism, and energy.²⁸¹ The Maghreb has further become highly relevant to Chinese submarine cable projects in order to extend its telecommunications connectivity and its intelligence and cybersecurity leverage among the Mediterranean. This was shown by the 2009 “Hannibal” cable linking Italy with Tunisia²⁸² or another cable connecting Libya and Greece. Nevertheless, the Chinese investment policy in the Maghreb is also harshly criticised: in Algeria, Chinese companies are said to have been involved in corruption scandals. Furthermore, Chinese projects are mostly financed by the Algerian state, which hardly generates FDI, and technology transfer remains low. In Morocco and Tunisia, the cultural distance to China is

²⁷⁵ <https://www.aei.org/china-global-investment-tracker/>.

²⁷⁶ Adel Abdel Ghafar and Anna L. Jacobs, *China in the Mediterranean: Implications of expanding Sino-North Africa relations*, Brookings, July 2020, <https://www.brookings.edu/research/china-in-the-mediterranean-implications-of-expanding-sino-north-africa-relations/>.

²⁷⁷ Yahia H. Zoubir, *Les Relations de la Chine avec les pays du Maghreb: La place prépondérante de l’Algérie*, in: *Confluences Méditerranée*, no. 109, vol. 2 (2019): pp. 91–103.

²⁷⁸ <https://www.ft.com/content/28187230-f970-11e8-a154-2b65ddf314e9>.

²⁷⁹ <https://oxfordbusinessgroup.com/overview/modernisation-route-capital-investment-boost-transport-infrastructure-continues-despite-lower>.

²⁸⁰ <https://www.portseurope.com/huawei-to-set-up-regional-logistics-centre-in-tanger-med-port/>.

²⁸¹ Yahia H. Zoubir, *Expanding Sino–Maghreb Relations: Morocco and Tunisia*, Research Paper, Chatham House, February 2020, <https://www.chathamhouse.org/sites/default/files/CHHJ7839-SinoMaghreb-Relations-WEB.pdf>.

²⁸² <http://www.fiberatlantic.com/system/jR815>.

considered to be negative,²⁸³ although China established cultural centres and Confucius Institutes in Tunisia²⁸⁴ and Morocco in 2018²⁸⁵ to deepen its cultural impact on Maghreb societies.

Furthermore, the Sino–Gulf interests in the Maghreb are also not necessarily congruent, but also bear the risk of intensifying competition: China is heavily invested in the tourism, education, infrastructure, communication²⁸⁶ and cybersecurity sectors,²⁸⁷ which poses the threat of rising competition with the Gulf states wrestling for the best market accesses, maritime routes, energy security, and geostrategic footholds. As China appears to neither interfere in internal political affairs nor promote a normative value-based approach (in contrast with Western states), it offers an interesting alternative for some of the Maghreb states, such as Algeria. All of those efforts could undermine Gulf investments.²⁸⁸ Since all Maghreb states are in dire need of Chinese investment and some of them show growing discontent with the Gulf's unfulfilled economic promises, such competition could play out in local, national and regional power struggles, economic constraints, and rising social and political fragmentation.²⁸⁹ In addition, China's deepening ties with Saudi Arabia's and the UAE's rivals Iran and Turkey could also cause some bilateral tensions. Thus far, China has managed to walk the tightrope, as it does not give either side an advantage in terms of economic cooperation. Since the Gulf states constitute the most important energy suppliers for China and, thus, are reliant on constructive partnerships on a bilateral level, they will not push China to distance itself from Iran or Turkey. For instance, Saudi Arabia was the second-largest oil exporter to China in 2018 with a volume of US\$29.7 billion (after Russia with US\$37.9 billion).²⁹⁰ However, China–Gulf relations could face future periods of more contestation if China starts to interfere in the geostrategic interests of the Gulf in the Maghreb or elsewhere.

²⁸³ Yahia H. Zoubir, *Expanding Sino–Maghreb Relations: Morocco and Tunisia*, Research Paper, Chatham House, February 2020, <https://www.chathamhouse.org/sites/default/files/CHHJ7839-SinoMaghreb-Relations-WEB.pdf>.

²⁸⁴ http://www.xinhuanet.com/english/2018-11/13/c_129992290_2.htm.

²⁸⁵ http://www.xinhuanet.com/english/2018-12/18/c_137682999.htm.

²⁸⁶ Huawei's North African headquarters have been established in Mohammed VI Tangier Tech City.

²⁸⁷ Sarah Feuer and Reda Ayadi, *Twenty Years Under King Mohammed VI (Part 2): Foreign Policy Developments*, PolicyWatch 3157, The Washington Institute for Near East Policy, July 29, 2019, <https://www.washingtoninstitute.org/pdf/view/1627/en>.

²⁸⁸ Sarah Yerkes, *Tunisia: Gulf's Loss Could be China's Gain*, Carnegie Endowment for International Peace, June 9, 2020, <https://carnegieendowment.org/2020/06/09/tunisia-gulf-s-loss-could-be-china-s-gain-pub-82012>.

²⁸⁹ Interview with a Saudi political analyst, April 23, 2021.

²⁹⁰ Camille Lons, Jonathan Fulton, Degang Sun and Naser Al-Tamimi, *China's great game in the Middle East*, Policy Brief, European Council on Foreign Relations, October 21, 2019, https://ecfr.eu/publication/china_great_game_middle_east/.

THE MAGHREB AS A GATEWAY TO NEW MARKETS: THE GEOSTRATEGIC DIMENSION

As a hub between Asia, Africa and Europe and as a “springboard”²⁹¹ to the Atlantic, the Maghreb acts as an interface and assumes a geostrategic and geopolitical hinge function for the Gulf states.²⁹² Against the background whereby maritime trade routes in a globalised economy ensure the transport of goods and energy resources, Gulf states show a fundamental interest in an increased maritime presence. In this regard, the Maghreb serves the smaller Gulf states of Qatar and, in particular, the UAE as a preferred target region in order to establish a strategic connection between the Persian Gulf, the Arabian Sea, and the Mediterranean Sea. Access to, and control of, trade routes and maritime infrastructure thus feature as being extremely relevant in Gulf policymaking.

In the UAE case, political decision-makers consider maritime investment to be a geopolitical cornerstone of their long-term power consolidation which is based on securing strategic assets through investors, rather than seeking territorial control: “Obviously, the UAE aims to create its own BRI”.²⁹³ As its economy is based on the security of global maritime trade routes, the UAE in particular has massively expanded its international maritime presence in recent years. Its network extends from the Persian Gulf, over the Gulf of Aden, to the Red Sea and the Horn of Africa; in the West to African countries such as Senegal and the Atlantic, and in the East to the Indian Ocean and beyond. The UAE has, undoubtedly, developed into one of the most influential players in global maritime infrastructure, despite – or perhaps because of – its geographically and demographically small size. With this approach, the UAE is aiming to gain strategic depth, which it wants to achieve primarily through investments in regional deep-sea ports, through infrastructural development of the hinterland of coastal regions, or through bilateral agreements with partner countries; this is indicated by railway projects such as the al-Boraq high-speed rail line in Morocco (which is 51% financed by France and 27% by Morocco, whereas the remaining 22% has been funded by the UAE together with Saudi Arabia and Kuwait).²⁹⁴ Against this backdrop, some describe the UAE as “modern Venice”:²⁹⁵ it defines its global importance through its maritime presence and uses this instrument as a strategic tool for soft and hard power projection.

²⁹¹ Interview with a European researcher, April 14, 2021.

²⁹² Interview with a European researcher, April 19, 2021.

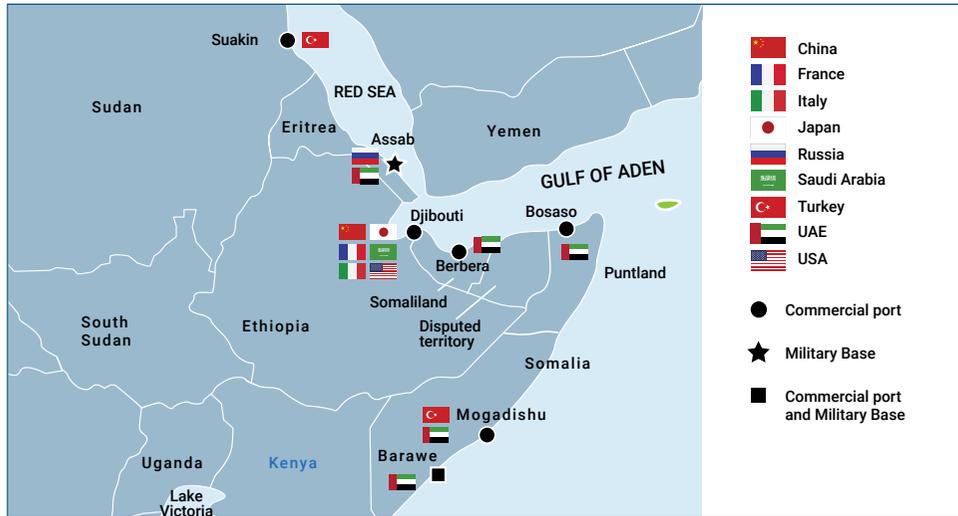
²⁹³ *Ibid.*

²⁹⁴ Michaël Tanchum, *Europe-Mediterranean-Africa Commercial Connectivity: Geopolitical Opportunities and Challenges*, *Med Dialogue Series No. 31, Regional Program Political Dialogue South Mediterranean*, Konrad Adenauer Foundation, November 2020, <https://www.kas.de/documents/282499/282548/Europe-Mediterranean-Africa+MED+Dialogue+31.pdf/000658ce-724a-d06d-208f-ea7ce5c4e409?version=1.0&t=1606305802651>.

²⁹⁵ Peter Salisbury, *Risk Perception and Appetite in UAE Foreign and National Security Policy*, *Research Paper, Middle East and North Africa Programme*, Chatham House, July 2020, <https://www.chathamhouse.org/sites/default/files/2020-07-01-risk-in-uae-salisbury.pdf>.

This is particularly important in West Africa and the Horn of Africa: the UAE, like all other Gulf states, has expanded its political, economic and military influence in the Horn of Africa, wherein it heavily engages militarily, politically and economically and in terms of maritime infrastructure as indicated by its investment in ports in Berbera and Doraleh, among others (see Figure 1).²⁹⁶

Figure 1: External players' commercial and military ports in the Horn of Africa



Source: <https://www.diis.dk/en/research/gulf-state-rivalries-in-the-horn-of-africa-time-a-red-sea-policy>.

In Sudan, the UAE together with Saudi Arabia was involved in the coup d'état against then-President Omar al-Bashir in 2019,²⁹⁷ and has further engaged in Ethiopia, Eritrea, and Somaliland in military, economic and political terms.²⁹⁸ Thus, the region has become a scene of regional rivalries, as Turkey, China, Russia, and the US are also very much involved in the Horn of Africa for maritime security and strategic reasons.²⁹⁹ Against this backdrop, the UAE wants to use its influence in Libya to expand its geostrategic relevance in the Horn of Africa. As the African littoral states constitute relevant beneficiaries of Gulf investment and military and political support with which they aim to win regional leverage and counterbalance the rising influence of Turkey, North Africa will remain a key entry point for further engagement in Sub-Saharan Africa and the Horn of Africa.

²⁹⁶ Will Todman, *The Gulf Scramble for Africa: GCC states' foreign policy laboratory*, CSIS Briefs, Center for Strategic and International Studies, November 20, 2018, <https://www.csis.org/analysis/gulf-scramble-africa-gcc-states-foreign-policy-laboratory>.

²⁹⁷ Noha Aboueldahab, *Sudan's protesters can help alleviate Yemen's tragedy*, Brookings, May 31, 2019, <https://www.brookings.edu/blog/order-from-chaos/2019/05/31/sudans-protesters-can-help-alleviate-yemens-tragedy/>.

²⁹⁸ Asli Aydintaşbaş and Cinzia Bianco, *Useful enemies: How the Turkey-UAE rivalry is remaking the Middle East*, Policy Brief, European Council on Foreign Relations, March 15, 2021, <https://ecfr.eu/publication/useful-enemies-how-the-turkey-uae-rivalry-is-remaking-the-middle-east/>.

²⁹⁹ Interview with a UAE researcher on the Horn of Africa, April 28, 2021.

The most relevant player in the UAE’s maritime expansion strategy is Emirati logistical company Dubai Port World (DP World). As one of the leading multinational port operators in the world, DP World is officially run as a private company but has (in fact) close ties to the Emirati government.³⁰⁰ The launch of the deep-sea Jebel Ali Port in Dubai, the ninth-largest port in the world in terms of traffic, in 1979, marks the start of the UAE as a global logistical and transport power. In the meantime, the network expanded on a global level: today, DP World has 49 holdings in deep-sea ports, containers, and marine terminals outside of the UAE. The network extends over 18 presences in Asia and Oceania, six in Africa, eight in Europe, and as many as 15 in America, wherein DP World operates in Canada as well as in several Central and Latin American countries (such as Brazil and Argentina) (see Table 6).³⁰¹

Table 6: DP World’s deep-sea ports and marine terminals

EUROPE	
SPAIN	Tarragona P&O ML
	Barcelona
FRANCE	Fos
	Le Havre
UNITED KINGDOM	Southampton
	London Port
BELGIUM	Antwerp
THE NETHERLANDS	Rotterdam
MIDDLE EAST AND AFRICA	
ALGERIA	Algiers
	Djen-Djen
SENEGAL	Dakar
EGYPT	Sokhna
DJIBOUTI	Doraleh
SOMALILAND	Berbera
SAUDI ARABIA	Jeddah
	Mina Al Hamriya
UAE	Deira Wharfage
	Dubai Creek Harbour
	Jebel Ali Port
ASIA AND OCEANIA	
PAKISTAN	Karachi

³⁰⁰ Asli Aydintaşbaş and Cinzia Bianco, *Useful enemies: How the Turkey-UAE rivalry is remaking the Middle East*, Policy Brief, European Council on Foreign Relations, March 15, 2021, <https://ecfr.eu/publication/useful-enemies-how-the-turkey-uae-rivalry-is-remaking-the-middle-east/>.

³⁰¹ <https://www.dpworld.com>.

INDIA	Mundra
	Nhava Sheva
	Cochin
	Chennai
	Visakha
THAILAND	Laem Chabang
VIETNAM	Ho Chi Minh City
CHINA	Hong Kong
	Qingdao
	Yantai
	Yiwu
KOREA	Busan
THE PHILIPPINES	Manila
	Batangas
PAPUA NEW GUINEA	Port Moresby
AUSTRALIA	Fremantle
	Melbourne
	Sydney
	Brisbane
LATIN AMERICA	
SURINAME	Paramaribo
ARGENTINA	Buenos Aires
BRAZIL	Santos
CHILE	Lirquén
	San Antonio
PERU	Callao
	Paíta
ECUADOR	Posorja
CENTRAL AMERICA	
DOMINICAN REPUBLIC	Caucedo
	Point Fortin
NORTH AMERICA	
CANADA	Saint John
	Prince Rupert
	Fraser Surrey
	Vancouver
	Nanaimo

Source: DP World.

From a strategic perspective, North African countries are therefore of particular interest: “North Africa is important because of Africa, not because of Europe”.³⁰² The two holdings in the Algerian ports of Algiers and Djen-Djen since 2008³⁰³ thus form the centre of DP World’s efforts to date to strengthen its African presence. Algeria has largely invested not only in ports but also in other infrastructure projects since the early 2000s, as shown by multi-lane motorways such as the East–West Highway and the Hauts Plateaux Highway, allocating EUR7.7 billion to development of the national infrastructure between 2015 and 2019.³⁰⁴ Therefore, Algeria constitutes a relevant focus of the UAE’s strategy to diversify and expand its maritime network. The UAE’s aim is to connect the DP World network not only to Europe but also to West Africa and Latin America (Brazil, Chile, Argentina) in order to expand the UAE’s South–South axis.³⁰⁵ However, both ports are lacking capacities and geostrategic relevance because they do not have access to the Atlantic and in light of the construction of Algeria’s new port of Al-Hamdaniyya, which is expected to start operation in 2021,³⁰⁶ and in which Turkey and China³⁰⁷ have already invested. Rather than Algeria, Dakar (Senegal) plays a fundamental role in the UAE’s global expansion strategy towards Mali, Niger, and Chad, in which the UAE operates on a military and security level and seeks more access to key trade corridors (see Figure 2).

³⁰² Interview with a UAE researcher, April 26, 2021.

³⁰³ <https://www.khaleejtimes.com/business/dp-world-takes-operational-control-over-port-of-algiers>.

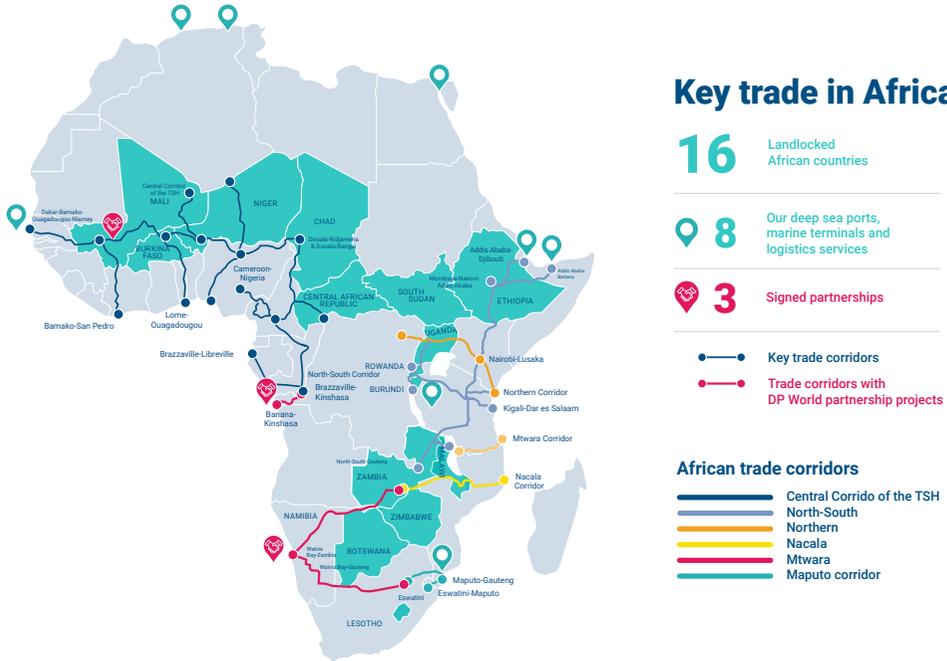
³⁰⁴ <https://oxfordbusinessgroup.com/overview/modernisation-route-capital-investment-boost-transport-infrastructure-continues-despite-lower>.

³⁰⁵ Interview with a UAE researcher, April 26, 2021.

³⁰⁶ <https://www.portseurope.com/construction-of-algerias-new-el-hamdania-mega-port-is-expected-to-start-in-may/>.

³⁰⁷ Adel Hamaizia, *Rebalancing Algeria’s Economic Relations with China*, Chatham House, November 3, 2020, <https://www.chathamhouse.org/2020/12/rebalancing-algerias-economic-relations-china>.

Figure 2: DP World's presence in Africa



Against this background, it is not surprising that DP World is striving for a stronger presence in Morocco: the Kingdom is strategically very favourable and could act as an adapter between Europe, West Africa, and Latin America.³⁰⁸ In contrast with Algeria, Morocco serves as a gateway to the Atlantic, to countries of interest such as Mauretania and Senegal, and to European markets including Spain.³⁰⁹ As of today, DP World has not acquired significant stakes in Tanger Med, the main Moroccan port in Tangier, but the UAE-based freight and logistical chain Emirates Logistics LLC signed a 30-year strategic partnership with Tanger Med and started to construct its own facility inside of the logistics free zone in 2018 (with an investment volume of US\$11 million).³¹⁰ In addition, the UAE³¹¹ has also shown an interest in investing in the Tunisian deep-sea port of Enfidha.³¹²

³⁰⁸ Francisco Estrazulas and Ricardo N. Bebczuk, *New Horizons for Trade and Investment: Strategies for the Gulf Countries and Latin America and the Caribbean*, Inter-American Development Bank, November 2019, <https://publications.iadb.org/en/new-horizons-trade-and-investment-strategies-gulf-countries-and-latin-america-and-caribbean>.

³⁰⁹ Interview with a European researcher, April 19, 2021.

³¹⁰ <https://www.morocoworldnews.com/2018/02/239880/emirates-logistics-adidas-inaugurate-logistics-center-tanger-med-facil/>.

³¹¹ Interview with a UAE researcher, April 26, 2021.

³¹² <http://www.ommp.nat.tn/enfidha-port/?lang=en>.

While its economic engagement in Algeria is often hampered by corrupt administrative structures, disputes regarding competence between the government and the military, and unsolved issues in purchasing land, the UAE is expecting easier access to maritime infrastructure and business opportunities in Morocco on a private and state-to-state level.³¹³ Against this background, the opening of the Emirati Consulate in Laayoune (located in Western Sahara) in November 2020 needs to be understood as a measure with which to improve political and business relations with Morocco in times of normalisation with Israel:³¹⁴ the UAE seems to consider this decision to be beneficial because it is expanding its geostrategic presence in West Africa and is improving strategic security cooperation not only with Morocco to create a “firewall”³¹⁵ against Iran, but also with governments that are supportive of the Moroccan position in the Western Saharan conflict (such as the UK).³¹⁶

Of course, the UAE’s investment strategy in maritime infrastructure in Algeria and Morocco also aims to counterbalance the Turkish presence in the region. Despite the fact that Turkey will play a comparatively marginal role in this power play with regard to infrastructural access due to less financial and technical capacity in comparison to the UAE, the Emirates’ competition with Ankara will intensify not only in terms of ideological grievances, but also in terms of maritime and logistical infrastructure. Furthermore, the UAE wants to reduce its maritime dependence on the Suez Canal, which is still considered the main trade route between the Red Sea and the Mediterranean. The fact that such dependency can quickly transform into vulnerability was most recently made clear in March 2021, when one of the world’s largest container ships, i.e. “Ever Given”, blocked the passage of the Suez Canal for several days and, thus, brought a large proportion of maritime trade to a standstill.³¹⁷

Unlike the UAE, Saudi Arabia follows only a transactional approach in terms of maritime, railroad and energy infrastructure towards North Africa: Saudi Arabia is more focused on the Red Sea as its direct vulnerable maritime neighbourhood and follows “no policy of grand design” in North Africa and has – in contrast with DP World – no similar relevant actor in maritime infrastructure as of yet.³¹⁸ However, as shown by investment in the TGV high-speed-train project between Tangier and Casablanca in Morocco and discussions surrounding a direct shipping lane between both kingdoms,³¹⁹ Saudi Arabia is also looking for opportunities for strategic investments, but without a comprehensive conceptual and geopolitical framework.

³¹³ Interview with a UAE researcher, April 26, 2021.

³¹⁴ Anna L. Jacobs, *Abraham Accords Bring Stronger Trilateral Ties for Israel, UAE, and Morocco*, Arab Gulf Institute in Washington, May 10, 2021, <https://agsiw.org/abraham-accords-bring-stronger-trilateral-ties-for-israel-uae-and-morocco/>.

³¹⁵ Interview with a US researcher on relations between the Gulf states and the Maghreb, May 12, 2021.

³¹⁶ Interview with a UAE researcher, April 26, 2021.

³¹⁷ <https://graphics.reuters.com/EGYPT-SUEZCANAL/SHIP/jzvnvgokdpl/>.

³¹⁸ Interview with a European researcher, April 19, 2021.

³¹⁹ Robert Mogielnicki, *Saudi-Moroccan Political Tensions Challenge Quiet Economic Ties*, Arab Gulf Institute in Washington, March 4, 2019, <https://agsiw.org/saudi-moroccan-political-tensions-challenge-quiet-economic-ties/>.

NEW PRIORITIES, NEW CHALLENGES: TRENDS FOR FUTURE GULF ENGAGEMENT IN THE MAGHREB

On a bilateral political level, partnerships between the Gulf states and North African countries are driven by particular and oftentimes opposing positions in terms of political alignments. As shown by the tensions between Morocco and Saudi Arabia or the ongoing Algerian and Tunisian reluctance to foster comprehensive cooperation, the reputation and the reliability of the Gulf states have suffered since the “Arab uprisings”. Although political ties will remain close, they cannot be taken for granted. Instead, both sides are diversifying their foreign partnerships, which has resulted in a deeper entrenchment of non-Arab countries in the region, such as China, Russia, and Turkey. In addition, the normalisation of both Morocco and the UAE with Israel is driven by a highly pragmatic stance and a “Morocco first” orientation, identifying new avenues for trilateral cooperation in terms of security and economy.³²⁰ However, at the same time, it will deepen regional and local fault lines between pro- and anti-normalisation forces³²¹ as Morocco shifts from a pro-Palestinian rhetorical and political discourse towards a more pro-Israeli bloc.³²²

The Gulf states are undergoing a tremendous shift from traditional rentier states to post-oil economies, which will also have clear implications for Gulf–Maghreb relations. As Saudi Arabia aims to develop itself as a main tourist destination in the region by constructing luxury tourist resorts on the Red Sea (such as the Coral or the Red Sea Project) and seeks to attract 100 million tourists annually by 2030,³²³ competition with North African tourist destinations such as Morocco and Tunisia is likely to increase.

Nevertheless, the Gulf states still consider the Maghreb to be a region with economic potential in terms of “green recovery”: for instance, as all Gulf states are promoting renewable and alternative energy such as solar and hydrogen, Morocco,³²⁴ Tunisia, and even Algeria offer excellent options for closer partnerships with the Gulf in terms of green energy. In April 2021, Saudi Arabia launched the “Saudi Green Initiative” and the “Green Middle East

³²⁰ Sadik Rddad, *The Conflicting Moroccan Responses to Normalization with Israel*, Fikra Forum, April 12, 2021, <https://www.washingtoninstitute.org/policy-analysis/conflicting-moroccan-responses-normalization-israel>.

³²¹ https://al-akhbar.com/Arab_Island/297924.

³²² Sadik Rddad, *The Conflicting Moroccan Responses to Normalization with Israel*, Fikra Forum, April 12, 2021, <https://www.washingtoninstitute.org/policy-analysis/conflicting-moroccan-responses-normalization-israel>.

³²³ <https://mt.gov.sa/en/TourismInvestment/Pages/TourismInvestment.aspx>.

³²⁴ <https://saudigazette.com.sa/article/537976/BUSINESS/ACWA-Power-inaugurates-Khalladi-wind-farm-in-Morocco>.

Initiative",³²⁵ which aim to foster regional integration in terms of environmental protection, climate change, and green energy. By promoting such initiatives, the political leadership wants not only to establish itself as a centre for the advancement of renewable energies, but also to gain global and regional leverage through a "revitalisation of 'green thought'".³²⁶ Muhammad bin Salman has recognised the signs of the times and is considering a turn to renewable energies as the key to repairing his partnership with Europe and the US, which was damaged by the Khashoggi murder. The hydrogen fuel partnership signed with Germany in spring 2021 can serve as another outstanding example of this approach.³²⁷ Saudi Arabia's leadership expects that such projects will not only consolidate political power but also strive to open up new markets and diversify energy policy.³²⁸

The Gulf states will continue to invest in North Africa but in more strategic terms than in recent years: as the most prominent example, the UAE is following a global approach in terms of access to maritime sea routes through DP World. Thus, the UAE will continue to invest in strategic infrastructure such as deep-sea ports, railroads, and logistical facilities in order to preserve its access to waterways and maritime security. Driven by a long-term agenda that is based on global aspirations, the UAE will therefore continue with such an investment strategy in North Africa to consolidate its power presence in West Africa, Central Africa, and the Horn of Africa. In this regard, the Maghreb serves an adapting function in linking the strategic corridors of UAE maritime supremacy. As such, UAE investments will not necessarily aim to consolidate the power of respective elites, i.e. the governments of political stakeholders, but rather to preserve the UAE's maritime power projection. Such a holistic and long-term approach will most likely affect the economic and political development of North Africa for years: the more the UAE aims to intermingle in inner-African affairs for economic and security reasons, the more it will invest in North Africa as one of the main areas of the UAE's interest.

The Maghreb lost relevance as a theatre of ideological rivalries. Historically, Saudi Arabia and the UAE considered political Islam in all facets to be a strong factor for regional and national destabilisation: in Saudi Arabia, political Islam had played a fundamental role since the 1950s, when Egyptian supporters of the Muslim Brotherhood were expelled by the Egyptian President and promoter of pan-Arabism Gamal Abd al-Nasser and sought asylum in Saudi Arabia. There, they constituted an integral part of the technocratic and educational elite by developing a national administrative apparatus but, at the same time, fostering Islamist indoctrination. Against this backdrop, the *Sahwa* ("Awakening") movement emerged as a Saudi-specific hybrid ideological movement inspired by Islamism and Salafism. In the aftermath of the seizure of the Great Mosque in Mecca in 1979 by a militant group that called itself *Ikhwan* ("Brothers"),³²⁹ the Saudi leadership decided to rigidly repress Islamist movements

³²⁵ <https://saudigreeninitiative.org/>.

³²⁶ Tobias Zumbärgel, *Environmental cooperation in the Gulf region: Why it matters and why it is failing*. In: Luigi Narbone and Abdolrasool Divsallar (eds.), *Stepping Away from the Abyss: A Gradual Approach Towards a New Security System in the Persian Gulf*, European University Institute, 2021: pp. 174-183.

³²⁷ <https://www.reuters.com/article/germany-energy-hydrogen-saudi-idUKL1N2L92KR>.

³²⁸ Interview with a European expert on alternative energy, April 15, 2021.

³²⁹ Nasir al-Huzaimi, *The Mecca Uprising: An Insider's Account of Salafism and Insurrection in Saudi Arabia*, London, 2020.

and started to replace Arab labour migrants with Asians considered to be less politically motivated and less critical towards the monarchical rule. From a UAE perspective, political Islam is considered even more critical and destabilising than in Saudi Arabia, which is based on an individual anti-Islamist antagonism by a small group of decision-makers with regard to Abu Dhabi's Crown Prince and the UAE's de facto leader Muhammad bin Zayid.³³⁰ While the UAE and Saudi Arabia continued to strive, after the "Arab uprisings", to counterbalance the "Islamist wave" in North Africa and limit the influence of Qatar in Egypt and Tunisia, these priorities have meanwhile shifted. The ideological rivalry between Turkey and the UAE in Libya, for example, continues to play a relevant role in Abu Dhabi's actions, but the ideological dimension is less relevant than geostrategic interests. Media polarisation and the demonisation of the "other" will continue to be part of Gulf Arab foreign policy, but Biden's presidency and the growing need for regional cooperation and integration are forcing all Gulf states to adopt a more conciliatory course. Settlement of the conflict between the blockading states and Qatar in January 2021 also contributed to an ideological de-escalation, although the roots of the conflict have not been resolved and, therefore, could flare up again and again in the form of ideological polarisation in North Africa and elsewhere. The same goes for the rivalry between Turkey and the UAE. The current phase thus represents a snapshot that is fragile and can transform into ideological rivalries again. Nonetheless, economic pressure is forcing all Gulf states to adapt and reduce traditional chequebook diplomacy for ideologically allied groups.

Finally, Saudi Arabia's support for various Salafist groups in North Africa also appears to have diminished. The perception of such support in specific parts of North African societies still plays a relevant role, as the example of Tunisia shows, but MbS promotes a "de-ideologization" of the religious sphere: as he put it, Saudi Arabia needs to return to a "moderate Islam"³³¹ that rejects extremism and promotes independent reasoning (*ijtihad*). In doing so, he consciously opposes the traditional representatives of a purist Wahhabism, which, however, have significantly lost relevance and acceptance, especially among the younger generations. Instead, many young Saudi women and men see themselves as devout Muslims but want to break the traditional dogmas of older generations: many of them have been educated and lived abroad and do not see modernity and tradition as irreconcilable opposites, but rather as part of their everyday reality. MbS seems to understand this. Against such a background, he disempowered the influential but also highly unpopular religious police (*mutawwa*)³³² and arrested some influential preachers³³³ such as Salman al-Awdah.³³⁴ He wants to present himself as a representative of a modern Saudi Islam that breaks up the encrusted structures of the past and addresses a young generation. At the same time, he aims to consolidate his position as the undisputed leader by not only determining the discourse on economic and social reforms, but also being respected as a pioneer of a debate surrounding the Saudi religious reorientation.

³³⁰ Peter Salisbury, *Risk Perception and Appetite in UAE Foreign and National Security Policy*, Research Paper, Middle East and North Africa Programme, Chatham House, July 2020, <https://www.chathamhouse.org/sites/default/files/2020-07-01-risk-in-uae-salisbury.pdf>.

³³¹ Annelle R. Sheline, *Mohammed bin Salman's Plan to Moderate Islam in Saudi Arabia*, Arab Gulf Institute in Washington, November 9, 2017, <https://agsiw.org/mohammed-bin-salmans-plan-moderate-islam-saudi-arabia/>.

³³² <https://www.bbc.com/news/world-middle-east-36034807>.

³³³ <https://www.aljazeera.com/news/2017/9/13/saudi-arabia-detains-more-preachers>.

³³⁴ <https://www.reuters.com/article/us-saudi-arrests-idUSKCN1UN017>.

Against this background, the model of Wahhabi-Salafist missionary work abroad has lost its relevance as an influential foreign policy tool: Saudi Arabia is still the “Guardian of the two Holy Places” and, thus, a role model in the Islamic world, albeit no longer an ideological leading power and having lost its “ideological charisma”.³³⁵ Salafist groups such as the Madkhaliyya in Libya are still inspired by Wahhabi ideology but are not directly instrumentalised by the Saudi state, since such an approach no longer fits into the strategy of the Crown Prince. In the past, the promotion of militant Islamism led to serious problems, as was seen in the aftermath of 9/11 when militant jihadists (such as Usama bin Ladin), inspired by Saudi Wahhabism, turned against their former sponsor.³³⁶ The Saudi leadership seems to have learnt its lesson, as MbS stated in an interview: “The Kingdom of Saudi Arabia has been a main target for extremist projects and terrorist acts in the world. If I were Osama Bin Laden and I wanted to spread my extremist thoughts throughout the world, especially amongst Muslims, where would I start? I will start in the state where the holy shrines of the Muslims are, where all the pilgrims come and to where all Muslims look five times a day [...]. Now, we cannot grow, we cannot attract capitals, we cannot have tourism, we cannot progress with such extremist thinking in Saudi Arabia”.³³⁷

Since the region has lost relevance as a theatre for ideological contestation, financial assistance and humanitarian aid will further diminish because most of the Gulf states are spending limited resources on a domestic (rather than on a regional) level. In contrast with Egypt in the pre-“Arab Spring” era, wherein financial packages worth billions of US dollars were provided to the as-Sisi government, the period of such politically-tied assistance in North Africa seems to be over: the Gulf states “must concentrate more of their efforts on keeping peace at home [...] and in the immediate neighborhood [...]. Yet the active, even outsized, role they have played in the MENA region and in world affairs has been built on massive foreign aid and investment, and they will thus be loath to give up that role”.³³⁸ In times of COVID-19, the Gulf states are significantly restructuring their development cooperation and humanitarian aid:³³⁹ in the case of Saudi Arabia, bilateral assistance will be provided mostly to beneficiaries of utmost strategic importance, such as Yemen and Bahrain. Thus, the Kingdom will no longer play the role of an “ATM or petrol station”³⁴⁰ for recipient countries. Against this backdrop, no financial assistance from the Gulf to North African countries has been channelled during the COVID-19 pandemic. Instead, among others, Saudi Arabia provided financial assistance to international organisations during its G20 presidency in 2020, which outlines a shift from its traditional humanitarian aid policy directed on a bilateral level towards a more multilateral level. Such a transformation in aid policy will also be reflected in development cooperation with North African countries: Tunisia, Morocco, and, increasingly, Algeria are establishing themselves as providers of development assistance and humanitarian aid, both of which are used as foreign policy instruments in the Sahel region to create strategic partnerships and clientelist relationships of dependency.

³³⁵ Interview with a European researcher on Saudi Arabia, April 20, 2021.

³³⁶ Guido Steinberg, *Der nahe und der ferne Feind: Die Netzwerke des islamistischen Terrorismus*, Munich, 2005.

³³⁷ <https://www.arabnews.com/node/11850146/saudi-arabia>.

³³⁸ Michele Dunne, *Changing Gulf Fortunes and Regional Role*, Carnegie Endowment for International Peace, June 9, 2020, <https://carnegieendowment.org/2020/06/09/changing-gulf-fortunes-and-regional-role-pub-82002>.

³³⁹ Yasmine Farouk, *Saudi Arabia: Aid as a Primary Foreign Policy Tool*, Carnegie Endowment for International Peace, June 9, 2020, <https://carnegieendowment.org/2020/06/09/saudi-arabia-aid-as-primary-foreign-policy-tool-pub-82003>.

³⁴⁰ <https://gulffnews.com/opinion/op-eds/saudi-arabia-is-not-an-atm-or-a-petrol-station-1.63718063>.

To this end, these countries have set up development implementation agencies which, particularly in Algeria, are very closely controlled by the state and the military.

The Algerian International Cooperation Agency for Solidarity and Development (Agence algérienne de coopération internationale pour la solidarité et le développement, ALDEC) was founded in February 2020 and is linked to high-ranking stakeholders from the security and military sector. For instance, in April 2020, President Tebboune appointed former intelligence officer Mohamed Chafik Mesbah as the ALDEC's first Director General. The ALDEC's orientation council further consists of the Minister of Foreign Affairs, the Minister of the Interior and Local Communities, the Minister of Finance, the Secretary General of the Ministry of Defense and its Chairman, as well as the Chief of Staff of the Presidency of the Republic.

The Moroccan Agency for International Cooperation (Agence Marocaine de Coopération Internationale, AMCI), based in Rabat, was created in 1986 to strengthen Morocco's activities of international cooperation. These activities focus in particular on promoting South–South cooperation in solidarity on the African continent, which has become a main pillar of Moroccan foreign policy since the early 2000s. AMCI has partnerships with 111 countries, 46 of them on the African continent. As one of the main partners, the Saudi-based multilateral Islamic Development Bank (IsDB) has established partnerships with AMCI in terms of rural electrification in Chad, Niger, and Mali, among others.

Finally, Tunisia hosts the oldest development cooperation agency in Africa. The Tunisian Agency for Technical Cooperation (Agence Tunisienne de Coopération Technique, ATCT) was founded in 1972 and focuses on technical training for Tunisian specialists and trilateral cooperation. The ATCT has several representations abroad, which are headed by experts in technical cooperation. Two of its regional branches are located in Saudi Arabia (as well as one each in the other GCC member states) and the ATCT also cooperates with IsDB.

Such agencies support projects in the education and training sector and are increasingly involved in building infrastructure in African countries. In this field, interesting opportunities for cooperation with Gulf Arab development actors such as state funds, multilateral organisations or semi-state, non-religious foundations are emerging. These could enable the Gulf states to achieve two goals: firstly, they could strengthen South–South cooperation in order to gain more political leverage; secondly, they could present themselves as committed and ambitious partners for regional actors in development policy.

The Gulf states have been pursuing a strategic donor policy since the 1960s and have to be understood as traditional “non-Western” (rather than emerging) donors.³⁴¹ Their membership in the Development Assistance Committee of the Organisation for Economic Co-operation and Development (OECD-DAC)³⁴² also shows their political willingness to coordinate better with donors in the Global North and increasingly disclose their humanitarian aid data. The

³⁴¹ Alain Robyns and Véronique de Geoffroy, *Les Bailleurs Emergents de l'Aide Humanitaire. Le Cas des Pays du Golfe, Plaisians, Groupe URD, 2009*, http://www.urd.org/IMG/pdf/09_10_10_nouveaux_bailleurs_VF.pdf.

³⁴² Céline Billat, *The Funding of Humanitarian Action by the Gulf States: A Long-Term Commitment, Humanitarian Aid on the Move, Plaisians, Groupe URD, 2016, Vol. 17*, <http://www.urd.org/The-funding-of-humanitarian-action>.

example of Qatar shows above all that this is still not entirely successful.³⁴³ Therefore, a closer partnership with the North African implementing agencies could also offer an opportunity to force trilateral cooperation with donor organisations from OECD countries, which would join the forces of and promote the integration of the Gulf states into the international cooperation landscape. Such joint projects could be implemented primarily in the areas of health, pandemic control, mental health, and education and training.

Another field of cooperation could open up in migration management: in times of COVID-19, the situation of labour migrants working in different Arab Gulf destination countries has become even more vulnerable than before. In recent months, repatriations and detentions of low- and semi-skilled labour have increased.³⁴⁴ Such treatment of migrants has been criticised by international actors such as the European Parliament (e.g. in the case of Ethiopian migrants in Saudi Arabia³⁴⁵), human rights organisations, as well as some governments of countries of origin and civil society actors. Travel restrictions and the dire need in the Gulf states to diversify their economies and create jobs for nationals ("nationalization"³⁴⁶) will place a further burden on the situation of labour migrants.

Under the current circumstances, the need to foster safe and regular migration, improve the conditions for returning migrants, and initiate cohesive activities for future migrants' orientation has intensified. The most important countries of origin are in the Horn of Africa (such as Eritrea and Ethiopia), in neighbouring Arab countries (such as Jordan, Lebanon, and the Palestinian Territories), and in South Asia (such as Pakistan, Bangladesh, the Philippines, and Nepal). However, a smaller number of North African migrants are also working in the Gulf. In order to improve their situation, Gulf governments and Maghreb countries of origin could accelerate their efforts to foster better and safer migration management.

While the UAE, Saudi Arabia, and Qatar will continue to play a changing but still relevant role in the Maghreb, the other GCC states seem to have no leverage at all: Of course, there is still a close, emotional bond between Kuwait, Oman, and Bahrain with some North African countries such as Morocco due to the high number of Gulf tourists travelling to the Kingdom.³⁴⁷ Tunisia, with its lively and heterogeneous democratic and parliamentary structure, "serves as a projection surface"³⁴⁸ for the diversity of the Kuwaiti political landscape, which is driven by a semi-democratic system but also dominated by the complex and difficult relationship

³⁴³ Interview with a technical expert on OECD-DAC, March 3, 2021.

³⁴⁴ Fahad L. Al-Ghalib Alsharif and Froilan T. Malit, Jr., *Migration and the COVID-19 Pandemic in the Gulf*, Policy Report No. 15, Regional Programme Gulf States, Konrad Adenauer Foundation, October 2020, <https://www.kas.de/documents/286298/8668222/Policy+Report+No+15+Migration+and+The+COVID-19+Pandemic+in+the+Gulf.pdf/87dd88bd-ed47-41c7-be23-48c5a5eb8d7c?version=1.0&t=1603448109241>.

³⁴⁵ European Parliament, *European Parliament resolution on the situation of Ethiopian migrants in detention centres in Saudi Arabia 2020/2815(RSP)*, October 7, 2020, https://www.europarl.europa.eu/doceo/document/RC-9-2020-0325_EN.html.

³⁴⁶ Steffen Hertog, *Arab Gulf States: An Assessment of Nationalisation Policies*, GLMM Research Paper, no. 1 (2014), Migration Policy Centre/Gulf Research Center, https://cadmus.eui.eu/bitstream/handle/1814/32156/GLMM%20ResearchPaper_01-2014.pdf?sequence=1&isAllowed=y.

³⁴⁷ Interview with a Kuwaiti researcher, April 25, 2021.

³⁴⁸ *Ibid.*

between the government and the National Assembly.³⁴⁹ Furthermore, the influential branch of the Kuwaiti Muslim Brotherhood³⁵⁰ has developed ideological, institutional and individual networks with Tunisia's Ennahda.³⁵¹ In Tunisia and Kuwait, similarities between parliamentary systems feature prominently as perceived commonalities, describing both systems as "islands of democracy in their respective regions".³⁵²

Yet, there is hardly any public and political discourse on North Africa either in Kuwait or in Bahrain and Oman. In the case of Kuwait and Oman, first and foremost, this is due to the fact that both have stayed out of the internal Gulf rivalries in recent years in order not to endanger their own positions as small and vulnerable states and to aim to present the Gulf as a cohesive unit.³⁵³ Kuwait and, to some extent, Oman traditionally regard themselves as mediators. Thus, such assumptions have also had an impact on both countries' minor involvement in North Africa.³⁵⁴ Secondly, in contrast with their wealthier neighbours the UAE and Qatar, Kuwait and Oman suffer from enormous economic problems, a bloated public sector, mismanagement and corruption, and a reform standstill due to the disrupted relationship between the government and the National Assembly in Kuwait's case.³⁵⁵ All of these problems enjoy the highest priority for new leaderships such as Emir Sheikh Nawaf Al-Ahmad Al-Jaber Al-Sabah in Kuwait³⁵⁶ and Sultan Haitham bin Tariq bin Taymur al-Sa'id in Oman.³⁵⁷ In terms of Bahrain, relevant economic and political engagement is oftentimes aligned with the priorities of the country's neighbours Saudi Arabia and the UAE. They heavily supported the Bahraini royal family Al Khalifa in particular after the "Arab uprisings" in order to prevent political instability and turmoil in times of domestic unrest driven by the Shiite majority and other oppositional groups.³⁵⁸ Since then, Bahrain's regional and foreign policies have been mostly in line with the Saudi and Emirati approaches (as shown by the Bahraini support during the Gulf rift). Therefore, an independent, comprehensive Bahraini outreach to the Maghreb does not exist.³⁵⁹

³⁴⁹ Michael Herb, *The Origins of Kuwait's National Assembly*, LSE Kuwait Programme Paper Series 39, March 2016, https://eprints.lse.ac.uk/65693/1/39_MichaelHerb.pdf.

³⁵⁰ Courtney Freer, *Kuwait's Post-Arab Spring Islamist Landscape: The End of Ideology?*, in: A. Kador Yildirim (ed.), *Pluralism and Inclusion in Post-2011 Kuwait*, Center for the Middle East, Rice University's Baker Institute, August 8, 2018, <https://www.bakerinstitute.org/media/files/files/7b1a34c2/cme-pub-camegie-kuwait-080718.pdf>.

³⁵¹ Interview with a Kuwaiti researcher, April 25, 2021.

³⁵² Interview with a Tunisian researcher, April 13, 2021.

³⁵³ Interview with a Kuwaiti researcher, April 25, 2021.

³⁵⁴ Interview with a US researcher on Kuwait, April 23, 2021.

³⁵⁵ Kristian Coates Ullrichsen and Simon Henderson, *Kuwait: A Changing System Under Stress*, The Washington Institute for Near East Policy, Policy Note 69, October 2019.

³⁵⁶ He succeeded Emir Sabah, who died in September 2020 after running the country since 2006. Similar to Sabah, Nawaf also follows a policy of continuation, moderation and mediation.

³⁵⁷ He succeeded the late Sultan Qabus bin Said, who passed away in January 2020.

³⁵⁸ Frederic M. Wehrey, *Sectarian Politics in the Gulf: From Iraq War to the Arab Uprisings*, New York, 2014.

³⁵⁹ Interview with a Bahraini researcher, May 26, 2021.

Against this background, North Africa hardly enjoys priority, especially since extensive funds are less and less available due to the fragile economic situation.³⁶⁰ Instead, Kuwait and Oman hope that North African countries such as Morocco will invest more in their own economies.³⁶¹ In addition, Kuwait and Oman could, together with Morocco or Tunisia, play a certain role in mediating regional conflicts in Yemen or with Iran.³⁶² Kuwait, in particular, could further support multilateral development cooperation between North Africa and the Gulf states. Kuwait is the Arab state with the longest history as a donor country for development assistance. It started providing concessional loans for development in 1962 through the Kuwait Fund for Arab Economic Development (KFAED) and, thus, prides itself on having been a pioneer of South–South cooperation. Ever since, Kuwait has built a track record of being a reliable and professional provider of financial and humanitarian assistance. With a presumed average quota of 1.5% official development assistance (ODA) and with contributions to international development worth more than US\$44 billion, it is the second-largest Arab donor (after Saudi Arabia). This is done mainly during meetings of the Arab Cooperation Group (ACG),³⁶³ which maintains a Secretariat at the Arab Fund for Economic and Social Development (AFESD) in Kuwait City. In addition, Kuwait became a participant in the OECD-DAC in January 2018. Both Oman and Bahrain do not enjoy similar options to enhance development cooperation with North Africa, as both, in contrast with Kuwait, Saudi Arabia, the UAE, and Qatar, lack independent governmental implementing agencies or development actors.

³⁶⁰ Interview with a US researcher on Kuwait, April 23, 2021.

³⁶¹ Interview with a Kuwaiti researcher, April 25, 2021.

³⁶² Interview with a US researcher on Kuwait, April 23, 2021.

³⁶³ <http://www.arabfund.org/default.aspx?pageId=610>.

CONCLUSION

The Gulf states' engagement in the Maghreb will continue to be driven by contestation and cooperation and characterised by new priorities and challenges: the Gulf states are following, to some extent, a "wait and see" approach which is related to changing global political patterns driven by tectonic recalibrations of partnerships and alliances, as the US is retrenching from the region and the overarching Middle Eastern strategy of Joe Biden is not completely clear as of yet.

Despite such uncertainties, the **UAE** will most likely act in the most proactive, strategic and comprehensive way, driven by long-term maritime and geostrategic aspirations as well as security and economic considerations. North Africa serves as a gateway to other markets and regions of utmost UAE interest. Today, Abu Dhabi seems to follow an approach towards North Africa which is similar to that followed by Qatar 10 years ago during the "Arab uprisings";³⁶⁴ in Libya, the UAE has heavily engaged in military terms to counterbalance the rising influence of Turkey,³⁶⁵ i.e. the most serious rival regarding the UAE's economic interests in the Eastern Mediterranean.³⁶⁶ Ideologically, the competition with Turkey has replaced the anti-Islamist "Ikhwanioia" by Saudi Arabia and the UAE.³⁶⁷ Furthermore, Abu Dhabi has established security-related links with Russia in order to gain more leverage in North Africa, but even more in West and Central African countries and the Horn of Africa.

In contrast, **Saudi Arabia** needs to focus more on its domestic affairs and its direct neighbourhood in order to resume its socioeconomic transformation and solve security threats related to the delicate situation in Yemen, Iraq, Lebanon, Egypt, Jordan, and the Red Sea, as well as the ongoing tensions with Iran.³⁶⁸ Driven by such domestic and regional configurations, Saudi Arabia's engagement in North Africa is driven by a transactional, non-strategic approach that does not follow a comprehensive master plan.³⁶⁹ Ideological influence through Salafi groups is still relevant, as in Libya,³⁷⁰ but can no longer be fully instrumentalised and controlled by Saudi state actors. Thus, North Africa does not constitute a top priority for Saudi Arabia. Instead, the Kingdom will most likely follow an ad hoc approach based on "less of the same"³⁷¹

³⁶⁴ Interview with a US researcher on Qatar, April 27, 2021.

³⁶⁵ Matthew Hedges, *United Arab Emirates: Reversing the Revolution*, Sadeq Institute, March 17, 2021, <https://www.sadeqinstitute.org/short-reads/uae-libya>.

³⁶⁶ European Council on Foreign Relations, *Deep Sea Rivals: Europe, Turkey, and New Eastern Mediterranean Conflict Lines*, May 2020, https://ecfr.eu/special/eastern_med.

³⁶⁷ Asli Aydintasbas and Cinzia Bianco, *Useful enemies: How the Turkey-UAE rivalry is remaking the Middle East*, Policy Brief, European Council on Foreign Relations, March 15, 2021, <https://ecfr.eu/publication/useful-enemies-how-the-turkey-uae-rivalry-is-remaking-the-middle-east/>.

³⁶⁸ Interview with a Saudi political analyst, April 21, 2021.

³⁶⁹ Interview with a European researcher on Saudi Arabia, April 20, 2021.

³⁷⁰ International Crisis Group, *Addressing the Rise of Libya's Madkhali-Salafis*, Report No. 200, April 25, 2019, <https://www.crisisgroup.org/middle-east-north-africa/north-africa/libya/addressing-rise-libyas-madkhali-salafis>.

³⁷¹ Interview with a Saudi political analyst, June 15, 2021.

by mostly reacting to actual and acute crises in the Maghreb (rather than establishing a coherent strategy driven by key objectives).

Qatar finds itself in the middle of both extremes: driven by economic interests, Doha still considers North Africa to be a potential market in terms of energy and infrastructure. However, Qatar has recalibrated its foreign policy following the post-“Arab uprisings” failure in Egypt and Tunisia. In contrast with his father, Emir Tamim follows a more pragmatic, non-assertive policy in the Maghreb. In doing so, he aims to position himself as an internationally-respected leader and a promoter of multilateralism and regional integration.³⁷² Furthermore, Qatar considers North Africa to be a less costly opportunity to improve its international reputation in supporting multilateral de-escalation efforts such as in Libya. Nonetheless, the unsolved root causes of the Gulf feud bear the risk of renewed tension and competition with the UAE, which is still watching Qatar with deep mistrust.³⁷³ In such a situation, “North Africa can again become a hot bed for inner-Gulf tensions”.³⁷⁴

In general, the “Gulf moment” that occurred after the “Arab uprisings” has not materialised in a Gulf monopoly in the Maghreb. Instead, internal cleavages such as the Gulf feud, domestic transformation processes in times of the “double shock”, and rising competition with external veto players show direct implications for the Gulf states’ engagement in North Africa. As all Gulf states need to adapt to such a new situation, they are reassessing their political, economic, strategic and ideological “pivot to the Maghreb”.

³⁷² Andreas Krieg, *Qatar: From Activism to Pragmatism*, Sadeq Institute, March 17, 2021, <https://www.sadeqinstitute.org/short-reads/qatar-libya>.

³⁷³ Anna L. Jacobs, *Qatar-Tunisia Ties Spur Competition with Gulf Arab Neighbors*, Arab Gulf Institute in Washington, December 14, 2020, <https://agsiw.org/qatar-tunisia-ties-spur-competition-with-gulf-arab-neighbors/>.

³⁷⁴ Interview with a Tunisian researcher, April 13, 2021.

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