

Mediterranean Platform
School of Government

LUISS



A Sea of Opportunities.

The EU, China and the
Mediterranean Connectivity

Luigi Narbone
Abdelkarim Skouri

Policy Paper
Luiss Mediterranean Platform

Issue 2024/08 - December 2024



Table of Contents

Abstract	1
Introduction: Connectivity and the Mediterranean	2
1. The Rise of Connectivity in Global Politics	3
2. Connectivity Models Compared	4
2.1. The Belt and Road Initiative or How China Sees Connectivity	4
2.2. The EU's Approach to the Geopolitics of Connectivity	6
3. The EU's and China's Connectivity Models in the Mediterranean	7
3.1. China's Mediterranean Penetration	8
3.2. The EU as a Key Mediterranean Actor	10
Conclusions: A New Political Momentum for Reshaping the Broader Mediterranean Space?	11

Abstract

The Mediterranean, a critical hub connecting Europe, Asia, and Africa, plays a vital role in global trade and energy flows. This paper examines the region's evolving connectivity landscape, focusing on the contrasting strategies of China's Belt and Road Initiative (BRI) and the EU's Global Gateway (GG). While China's approach emphasizes extensive infrastructure investment to expand its influence, the EU advocates for sustainable, rules-based connectivity to address regional challenges and counter Beijing's dominance.

The paper analyses key aspects of these connectivity initiatives and their Mediterranean projections, including China's development of maritime infrastructure and the EU's investments in energy transition and digital technology. It highlights challenges such as geopolitical rivalries, underdeveloped regional integration, and the risk of weaponized interdependencies, while emphasizing the need for a cohesive strategy that boosts Euro-Mediterranean relations—currently stagnant—and enhance the region's role as a global connectivity hub.

Authors

Luigi Narbone

Prof. Luigi Narbone is the Director of the Mediterranean Platform at the School of Government, Luiss Guido Carli and Professor of Practice at Luiss Guido Carli University. From 2015 to 2021 he was co-founder and Director of the Middle East Directions Programme at the Robert Schuman Centre for Advanced Studies, as well as professor and coordinator of the Peace and Security cluster at the School of Transnational Governance, at the European University Institute. Before moving to academia, Prof. Narbone had a long diplomatic career at the European Union and the United Nations. From 2008 to 2012 he was Ambassador, Head of the EU Delegation to Saudi Arabia, as well as non-resident EU Ambassador to Qatar, Oman, Bahrain, the United Arab Emirates and Kuwait.

Abdelkarim Skouri

Abdelkarim Skouri is a Research Associate at the Luiss Mediterranean Platform, where he supports the EU-funded Libya's Permanent Political Platform and the World Bank-funded Libya Youth Economic Research projects. He also contributes to expanding the Platform's activities, with research interests spanning geoeconomics and international cooperation. He holds a degree in International Relations and Security from Luiss University - Rome and is an alumnus of UM6P - Rabat and Sciences Po - Paris. Abdelkarim has previously been an intern at the International Chamber of Commerce in Paris and the International Affairs Institute of Rome.

Introduction:

Connectivity and the Mediterranean

Due to its strategic position at the crossroads of Europe, Africa and Asia, the Mediterranean has been a vibrant trading area for millennia. In the modern era, it continues to play a pivotal role as a vital transit corridor for maritime commerce. The Mediterranean accounts for 20% of global shipping traffic, 27% of container shipping and 30% of oil and gas flows, including key pipeline routes, making it one of the busiest waterways in the world.¹

Benefiting from both intra-Mediterranean trade and connections to Asia, Mediterranean ports are rapidly enhancing their appeal and competitiveness. According to the Liner Shipping Connectivity Index (LSCI), the efficiency of Mediterranean ports has significantly improved in recent years, steadily narrowing the gap with their Northern European counterparts.² This trend is expected to continue, driven by the growing regionalization of trade flows. At the same time, Asia-led by China—is likely to remain a dominant powerhouse in global manufacturing. EU’s direct import and export exposure to China has almost tripled since 2000, rising from 8% to 22% and from 3% to 10% respectively,³ with import exposure rising nearly 6 percentage points since 2013. As a result, the Mediterranean is increasingly connected with the Indian subcontinent and the Far East through the Red Sea and fleet capacity has been growing since 2022.⁴ In cases like Tanger Med in Morocco and East Port Said in Egypt, ports are also emerging as new important industrial and logistical hubs.

The Mediterranean presents significant investment opportunities for public and private actors aiming to secure a stake in the rapidly growing renewable energy market. It also has significant investment potential due to an important “infrastructural deficit”. MENA countries are grappling with increasing pressure on existing infrastructure caused by rapid demographic growth, accelerated urbanization and the rise of an expanding middle class. Physical connectivity and economic integration between MENA countries remains underdeveloped.⁵ Poor land and sea transportation networks, along with a lack of digital infrastructure, hinder the efficient movement of goods and services, both within and across borders and restrict global market access. In MENA an estimated 5.5% of GDP is lost annually due to poor transport and logistics. Notably, only 5% of cargo traffic in the Mediterranean region is between MENA countries, compared to 70% between European ports and 15% between Europe and North Africa.⁶ The link between the infrastructural deficit and the low intra-regional economic integration in MENA is a longstanding reality. According to the World Bank, the region will need to allocate at least 8.2% of its GDP until 2030 in infrastructure development.⁷ However, over the past decade, infrastructure spending in the region has averaged just 3% of GDP, with most funding coming from the public sector, multilateral and bilateral debt financing.⁸ Rising debt burdens and fiscal pressures limit governments’ ability to fund these critical investments.

Moreover, the Mediterranean is rapidly evolving into a critical nexus for global connectivity projects. Apart from China’s *Belt and Road Initiative* which will be examined in detail in the next sections, a prime example is the *Development Road Project*, led by Iraq, Turkey, Qatar and the UAE. This 750-mile land corridor will link the Persian Gulf to the Mediterranean via railways, roads and ports, enabling faster trade between Asia and Europe and enhancing the region’s strategic importance as a continental bridge.⁹ Similarly, the *India-Middle East-Europe Economic Corridor (IMEC)*, announced at the G20 Summit in 2023, envisions a trade and infrastructure corridor connecting East and West, with the Mediterranean serving as a critical

1 Massimo Deandreis et al., “Maritime Scenario in the Mediterranean: Analysis of the Competitiveness and Investments of the Major Logistics Players,” *IAI Papers* No. 22-07, Istituto Affari Internazionali (IAI), May 2022, <https://bit.ly/3OHZzcA>.

2 Ibid, 3.

3 Frank Vandermeeren, “Understanding EU-China Exposure,” *Single Market Economics Briefs* No. 4, European Commission, January 2024, <https://bit.ly/49mrMPF>.

4 UNCTAD, *Review of Maritime Transport 2024: Navigating Maritime Chokepoints*, 2024, <https://bit.ly/49mrOyT>.

5 Exporting across borders in the MENA region is notably costly and time-consuming, with an average cost of \$442 and 53 hours required to comply with border regulations, three times more expensive and four times longer than the averages in OECD high-income economies. See: World Bank, *Trading Together: Rejuvenating Middle East and North Africa Regional Integration in the Post-Covid Era*, MENA Economic Update, October 2020, <https://bit.ly/4f9hKT4>.

6 IMF, “Economic Integration in the Maghreb: An Untapped Source of Growth”, *Departmental Paper Series* No. 19/01, 2019, <https://bit.ly/4g4oV0m>.

7 Paul Numba Um, “Building forward better in MENA: How infrastructure investments can create jobs,” *World Bank Blogs*, November 4, 2020, <https://bit.ly/4f5i8BW>.

8 Ibid.

9 Ranj Alaaldin, “Iraq’s Development Road Project: A Path to Prosperity or Instability?,” *Issue Brief*, The Middle East Council on Global Affairs, October 2024, <https://bit.ly/3ZDUqsg>.

link. The segment from India to the Gulf will be bolstered by India's emergence as a manufacturing and digital giant, while the section spanning the Levant to Europe faces significant challenges, including political instability, underinvestment and strained partnerships. Overcoming these obstacles and fostering effective collaboration will be essential for the corridor's success.¹⁰

These initiatives collectively have the potential to solidify the Mediterranean's position as a critical hub for global connectivity. By harnessing the synergies among these various projects, improved connectivity could address some of the region's longstanding challenges, such as the lack of regional integration and the limited participation of MENA countries in global value chains. This, in turn, could promote sustainable development and help mitigate the severe socio-economic challenges faced by many countries in the region. Furthermore, win-win connectivity partnerships could strengthen north-south economic and cultural integration, bringing the two shores closer together and paving the way for a more cohesive and prosperous region.

However, the outlook is not entirely optimistic. The Israel-Gaza-Lebanon war highlight how unresolved conflicts can severely disrupt progress in economic cooperation. Moreover, growing geopolitical and geoeconomic competition risks turning connectivity projects into battlegrounds for rival powers. It is too early to determine whether the current focus on connectivity will evolve into a unifying and inclusive force or become another source of division. This trajectory will ultimately shape the region's future.

In the Mediterranean, China and the EU are the key players in connectivity, both aiming to deepen their economic presence and expand their influence. Recently, strategic competition has defined Sino-European relations, with many within the EU identifying China as a "systemic rival" and adopting a three-pronged strategy: "cooperate where possible, compete where necessary, and confront where required."¹¹ This competitive dynamic is particularly evident in the Mediterranean.

Over the past decade, both powers have launched flagship initiatives: China's Belt and Road Initiative (BRI) and the EU's Global Gateway (GG). These initiatives differ significantly in approach and the future of Mediterranean connectivity will depend on whether these projects clash, overlap, or find ways to complement each other.

This policy report examines the competing models of China and the EU in the framework of Mediterranean connectivity. It begins by exploring how connectivity has emerged as a key element of contemporary international relations and how the growing risk of the weaponization of interdependencies is reshaping its significance. The report then analyses the structure and objectives of the BRI and the GG, evaluating their respective performance and potential impact in the Mediterranean region. Finally, it concludes by proposing possible directions for EU policies in this domain.

1. The Rise of Connectivity in Global Politics

In recent years, "connectivity" has emerged as a central theme in global politics. Logistical networks, digital infrastructure, energy flows, trade routes, capital movements and other forms of transnational interactions have acquired growing importance in shaping the international system. States and non-state actors, including multinational corporations, form complex webs of relationships around key areas of connectivity, where diverse and often unequal players interact in 'variable geometries.'¹² Within this evolving global system—more and more described as a "heterarchy"—countries are increasingly adapting to a "nodal" framework of interdependence. This framework represents a space where structured quasi-hierarchies coexist, overlap, compete and sometimes collide.¹³

This systemic shift is unfolding as globalization, once championed by the neoliberal Washington Consensus, begins to unravel. This process, started in the 2010s, has recently accelerated, epitomized by several important events. In 2020, the COVID-19 pandemic exposed the fragility of global supply chains, disrupting numerous economic sectors and leading

10 Alberto Rizzi, "The infinite connection: How to make the India-Middle East-Europe economic corridor happen," *Policy Brief*, ECFR, April 2024, <https://bit.ly/49GIYAN>.

11 European People's Party Group, "EU-China Relations - Towards a Fair and Reciprocal Partnership," *Strategy Paper*, March 2021, <https://bit.ly/4gmPOwg>.

12 McKinsey Global Institute, "Geopolitics and the Geometry of Global Trade," *Report*, January 2024, <https://bit.ly/4fZDvWB>.

13 See: Philip G. Cerny (ed.), *Heterarchy in World Politics* (London: Routledge, 2023).

to a 5.3% contraction in world trade. Similarly, in the aftermath of the 2022 invasion of Ukraine, Russia leveraged its interdependencies with Europe, triggering a gas supply crisis and causing a 50% surge in global energy prices.¹⁴ These actions challenged the old continent's widespread belief that economic interdependence bring nations closer together. They ultimately forced Europe to drastically cut its gas imports from Moscow. Similar dynamics occurred in global food markets, where Russia's invasion of Ukraine restricted grain exports to the Middle East and Africa, driving up prices and sparking a food security crisis.¹⁵

At the same time, economic nationalism and zero-sum mindsets have become dominant forces, undermining global free trade and threatening the stability of international flows. During the first Trump administration, the U.S.-China trade war disrupted critical supply chains, but more importantly, it sounded a warning, highlighting how value chains can become the frontline of intense geo-economic competition.

In this context, interdependences can no longer be viewed solely as positive forces for global or regional economic integration, nor as guaranteed pathways to peace and stability, as it was in the decades following World War II. The high levels of interconnectedness in today's world have amplified the risk of the weaponization of interdependence, exposing significant vulnerabilities. Addressing these vulnerabilities is crucial to enhancing the security and resilience of states.

As globalization evolves and international cooperation declines, geopolitical rivalries are transforming technological and energy dependencies, as well as physical and digital infrastructures, into instruments of influence, competition and confrontation. Relations between global powers and countries in the Global South are increasingly shaped by these rivalries. In a world where nearly anything can become a tool or arena for contention, the "return of geopolitics"¹⁶ has prompted all actors to rethink their foreign and economic policy frameworks, placing "connectivity" at the center of their strategies. The proliferation of connectivity projects also serves as a means to restore some degree of predictability in economic relations among nations, in a highly uncertain world where the rules and institutions governing international trade face growing challenges.

But competing visions of connectivity can also transform this domain into a strategic battleground for future "connectivity wars."¹⁷ In such a scenario, rival powers may attempt to disrupt trade, investment, international law, internet infrastructure, transport links and the movement of people.¹⁸ This evolving landscape pushes countries to develop 'connectivity-based international relations',¹⁹ where alliances, rivalries and strategies are increasingly built around competing ways to manage and control networks, infrastructures and flows.

China's BRI and the EU's GG stand as significant examples of these competing visions.

2. Connectivity Models Compared

2.1. The Belt and Road Initiative or How China Sees Connectivity

Launched in 2013, the BRI, also known as the new Silk Road, is China's ambitious global infrastructure project. It covers over 150 countries, which together represent two-thirds of the world's population and over 40% of global GDP. The BRI aims to enhance trade connectivity and economic cooperation through an extensive network of roads, railways, ports and digital infrastructure, encompassing both overland and maritime corridors. The overland routes stretch from China through

14 Jakob Feveile Adolfsen, "The impact of the war in Ukraine on euro area energy markets," *ECB Economic Bulletin* No. 4/2022, European Central Bank, June 2022, <https://bit.ly/4goXihZ>.

15 Natasha Turak, "Russia's war is threatening the Middle East's food security," *CNBC*, April 28, 2022, <https://bit.ly/3VqxMRM>.

16 Carsten Nickel, What do we talk about when we talk about the 'return' of geopolitics? *International Affairs* 100(1): 221–239, <https://bit.ly/3OJV01s>.

17 Mark Leonard, *Connectivity Wars: Why Migration, Finance and Trade are the Geo-economic Battlegrounds of the Future*. (London: ECFR. 2016), <https://bit.ly/4fdoDTG>.

18 Ibid. As defined by ECFR's Director Mark Leonard, "connectivity wars [are those wars for which the] battleground will not be the air or ground but rather the interconnected infrastructure of the global economy: disrupting trade and investment, international law, the internet, transport links and the movement of people."

19 Viktor Buzna et al., "Connectivity: exploring the concepts behind today's geoeconomic buzzword," *MKI Long Brief*, HIIA Connectivity Center, Hungarian Institute of International Affairs, February 22, 2024, <https://bit.ly/41l2CPe>.

Central Asia to Europe and the Middle East, while the maritime routes link Chinese ports with Southeast Asia, South Asia, Africa and Europe via critical sea lanes. With investments nearing \$1 trillion to date and projected to reach \$8 trillion in the coming decades, China has significantly expanded its global network of partnerships.²⁰

Despite its emphasis on infrastructure, the BRI is a multidimensional project, allowing China to pursue a wide array of objectives. Economically, connectivity helps China to accelerate trade,²¹ strengthening financial integration and enhancing policy coordination with partner countries, while at the same time fostering people-to-people exchanges. Moreover, the BRI creates significant opportunities for Chinese companies to invest overseas, assisting China's manufacturing sector in placing excess capacity and Chinese banks to provide credit to BRI projects at near-market rates. Economic partnerships have included a wide range of activities such as the development of free economic zones, the building of green cities, or the establishment of financial hubs to support the internationalization of the renminbi (yuan, RMB).

But the BRI's goals extend beyond the economic realm. Politically, China has branded the BRI as a peace and development project and used it to consolidate its relationships with numerous countries in the Global South. Many countries have welcomed the opportunities offered by the Initiative as a genuine contribution to their development efforts and increased their ties with China. Gulf countries, for instance, have signed strategic partnerships with Beijing with the aim to advance their respective 'Visions', their national programs for economic diversification and modernization.

From a geostrategic perspective, the BRI reflects China's forward-looking global vision. It has allowed Beijing to counter the U.S. "pivot to Asia" by redrawing trade routes to position China, rather than the U.S., at the center of global networks.²²

The BRI has also faced significant criticism. In several instances, the easy access to Chinese credit has created challenges for partner countries. Some have struggled with debt repayment and defaulted, like Sri Lanka²³ and Zambia.²⁴ China—known for its reluctance to restructure debt—has occasionally repossessed critical assets in these countries, fueling accusations of intentionally creating "debt traps." These actions have heightened concerns and suspicions among China's rivals about Beijing's true intentions. For example, India has accused the BRI of working to seize control of key chokepoints and establish dominance in Asia.²⁵ Additionally, recent economic difficulties in China have substantially reduced the financial resources available for funding BRI projects. This has led to growing doubts about the initiative's ability to maintain its momentum and achieve its long-term objectives.

Whatever the case, the reality is that over more than a decade of adaptation, the BRI has positioned itself as a truly global and leading model for connectivity. With undefined geographic boundaries, substantial financial resources and long-term projections extending to 2049, the BRI has provided critical funding for infrastructure development worldwide and enabled Beijing to significantly expand its global influence.

The BRI has also sparked a wave of reactions, prompting the announcement of numerous alternative connectivity initiatives by the US, Japan and other actors. Among these 'counter-BRIs' are the *Asia-Africa Growth Corridor (AAGC)* put forward in 2017 by Japan, India and several African countries; the closely connected initiatives of *Blue Dot Network*, '*Build Back Better World*' and *Partnership for Global Infrastructure and Investment (PGII)*, launched by the U.S. and its Asia-Pacific and Trans-Atlantic allies; and the *India-Middle East-Europe Economic Corridor (IMEC)*, announced by India, Saudi Arabia, the UAE, the EU and the US.

The EU's GG is perceived by many observers as a response to the BRI. For European policymakers, China's initiative has become both a benchmark and a competitive challenge in their efforts to establish viable alternatives for foreign projection within the global connectivity landscape.²⁶

20 James McBride et al., "China's Massive Belt and Road Initiative," *Backgrounder*, Council on Foreign Relations, February 2023, <https://bit.ly/4fdoVKg>.

21 Clark Banach and Jacob Gunter, "How China's Belt and Road projects are shaping global trade and what to expect from the initiative in its second decade," *MERICS China Global Competition Tracker* No. 4, MERICS, December 2023, <https://bit.ly/41rqa5j>.

22 McBride et al., 2023.

23 Mark A. Green, "Debt Distress on the Road to "Belt and Road"," *Stubborn Things*, Wilson Center, January 2024, <https://bit.ly/3BhDzC8>.

24 Jana de Kluiver, "Navigating the complex terrain of China-Africa debt relations," *ISS Today*, Institute for Security Studies (ISS), November 2023, <https://bit.ly/4f3yZ8q>.

25 Darshana M. Baruah, "India's Answer to the Belt and Road: A Road Map for South Asia," *Working Paper*, Carnegie India, August 2018, <https://bit.ly/3OITXlv>.

26 Maaike Okano-Heijmans, "The EU's Connectivity Strategy 2.0: Global Gateway in the Indo-Pacific," In Y. Hosoya & H. Kundnani(eds.), *The Transformation of the Liberal International Order: Evolutions and Limitations* (Singapore: Springer, 2024, 23-54), <https://bit.ly/3ZDiVWv>.

2.2. The EU's Approach to the Geopolitics of Connectivity

In view of intensifying geopolitical competition, even the EU—a staunch advocate of global free trade—has found it necessary to integrate connectivity into its strategic agenda. In a world where interdependencies can become increasingly problematic, the challenges posed by a rising China—especially Beijing's efforts to expand its influence through the BRI—have compelled the EU to accelerate its pursuit of “strategic autonomy.”²⁷ Connectivity has thus emerged as a crucial pillar of EU foreign policy.

Building on decades of success in enhancing internal connectivity through the single market, the EU first introduced the concept of connectivity in its policies for the Indo-Pacific, a newly prioritized region due to its growing economic importance for the Union.²⁸ In the 2018 Strategy on Connecting Europe and Asia, the EU identified a wide range of connectivity priorities—from large-scale infrastructure investments to the harmonization of standards and regulatory practices—as essential tools to unlock opportunities between the two regions. While many of these areas already formed part of EU's international cooperation toolbox, the novelty was the emergence of connectivity as the overarching umbrella for action, signaling a shift towards a more strategic and forward-looking external action.

Ursula von der Leyen's “geopolitical” Commission (2019–2024) made significant strides in integrating connectivity as a core element of EU foreign policy. In 2021, the Commission unveiled the GG Initiative aimed at fostering “smart, clean and secure links” in the digital, energy and transport sectors. The GG is also framed as the EU's contribution to addressing the global infrastructure investment gap—estimated at \$13 trillion to meet the Sustainable Development Goals (SDGs). By doing so, it seeks to foster economic growth, enhance productivity and improve equitable access to education, employment and essential services for communities worldwide.

At the same time, the Commission positions the Initiative as a key instrument for the success of the Green Deal and the Digital Compass. For example, the GG serves as a key funding mechanism for the EU to develop critical mineral supply chains from Africa,²⁹ which are essential for the the European green industry. Some have even described the GG as a global extension of the Green Deal, given its strong focus on clean energy infrastructure.³⁰

On the digital front, amid concerns about the EU diminishing influence in setting international technical standards, the GG marks a strategic shift. The EU is now actively shaping digital standards through targeted investments in infrastructure, regulatory frameworks and development initiatives.³¹ The €820 millions announced as part of the EU-Nigeria Digital Economy Package (2021-2024) is a prime example.

But this initiative is also widely regarded as the EU's strategic response to China's BRI, particularly targeting Beijing's influence within the EU and its geopolitical “backyard.” For example, the GG is the EU's concrete contribution to the Partnership for Global Infrastructure and Investment, a G7's broader plan to counter to China's BRI through sustainable, inclusive, resilient and quality infrastructure investments.

The GG thus rebrands numerous existing European projects into a more cohesive framework “designed to streamline the EU external investment and development cooperation”,³² while maintaining the strong normative focus characteristic of EU foreign policy. With a budget commitment of €300 billion by 2027—half of which is allocated to Africa—the initiative mobilizes *Team Europe*, a flexible coalition of EU institutions, Member States, the European Investment Bank and private sector partners, to drive its implementation.

27 Mario Damen, “EU Strategic Autonomy 2013-2023: From Concept to Capacity,” *EU Strategic Autonomy Monitor Briefing*, European Parliamentary Research Service, July 2022, <https://bit.ly/3ZFSDTs>.

28 Maaïke Okano-Heijmans, 2024.

29 Paul Okumu and Daniele Fattibene, “The Global Gateway Three Years Later – An African Reality Check for the Next Commission,” *ETTIG Blog*, European Think Tanks Group (ETTIG), September 24, 2024, <https://bit.ly/4f448bR>.

30 Claire Shirley, “A gateway to partnership,” *EIB Stories*, European Investment Bank (EIB), June 2, 2023, <https://bit.ly/3Bc9mo5>.

31 Marta Granados Hernandez, “Global Gateway and the EU's Digital Ambitions,” Center for Strategic and International Studies (CSIS), May 19, 2022, <https://bit.ly/49sy5kQ>.

32 Chloe Teevan and San Bilal, “The Global Gateway at two: Implementing EU strategic ambitions,” *Briefing Note No. 173*, ECDPM, November 2023, <https://bit.ly/3O13FRT>.

While the budget allocation is substantial, the Initiative has faced several important criticisms. First, many have accused it of lacking ambition and being insufficient to address the complex challenges of global connectivity, especially when compared to the BRI. Secondly, critics have highlighted the absence of clear geographic priorities as a significant shortcoming, which risks further undermining the GG's geopolitical and geoeconomic relevance. Thirdly, the implementation mechanism through Team Europe is vague, with multiple layers of decision-making and uncertainties surrounding the alignment of potentially divergent interests.

Overall, the approach—relying on a combination of grants and loans to stimulate larger private-sector investments—appears perhaps overly optimistic regarding the real potential of financial leverage and the transformative capacities of what is essentially a piecemeal, project-based and market-driven strategy. Critics also point out that, unlike the BRI's centralized command structure, which advances largely through a government-to-government model with state-owned enterprises and public financial institutions as its backbone, the GG lacks a comparable level of cohesion and strategic focus. Concerns exist regarding the criteria for project selection, the processes by which projects reach maturity and the extent to which they contribute to creating a synergistic ecosystem to enhance connectivity. Many of the public-private partnerships progressing under the Initiative seem to involve projects that were already priorities for the private sector. These issues continue to feed doubts about the GG's ability to achieve its stated objectives.

The GG Forum, held in October 2023, aimed to bolster the credibility of the Initiative by unveiling 90 flagship projects across multiple sectors and regions. This list has grown to 218 projects in 2024, while the EU Council has endorsed 46 new flagship initiatives for 2025.³³ This renewed momentum reflects a growing consensus among European policymakers about the GG's importance.³⁴

But the real significance of the GG lies perhaps in the EU's effort to establish a European model of connectivity that prioritizes governance and sustainability. In doing so, the EU's connectivity narrative directly addresses the criticisms often levied against the BRI—such as concerns about debt sustainability, environmental impact and transparency. Centering its 'offer' on adherence to governance norms and high-quality standards, the GG model builds on three core principles: sustainability, comprehensiveness and a rules-based approach. The EU pledges to invest in quality infrastructure that fosters “links instead of dependencies,” emphasizing environmentally and financially sustainable connectivity grounded in internationally agreed norms. Connectivity, in the EU's vision, is a multi-layered concept, which puts emphasis on shared interests and convergences between the EU and its partners, rather than creating dependencies that can be weaponized. Strategic investments in infrastructure aims at bolstering secure and sustainable relations, shaping the “flows of globalization”.³⁵

This combination of transnationalism and a norm-setting approach, while unlikely to fully deliver equal partnerships, represents perhaps the EU's most pragmatic response to an increasingly competitive and strategically driven international landscape.³⁶ Whether this model is sufficiently attractive³⁶ to outcompete the challenge posed by China remains an open question.

3. The EU's and China's Connectivity Models in the Mediterranean

Neither the EU nor China has developed a fully cohesive Mediterranean strategy. While the EU has been politically more active in the region since the launch of the Euro-Mediterranean Partnership in 1995 and its 2008 offshoot, the Union for the Mediterranean (UfM),³⁷ both powers primarily engage pragmatically with Mediterranean countries through bilateral political and economic relations, rather than comprehensive regional strategies.

33 Council of the EU, “Global Gateway: Council endorses flagship project list for 2025,” *Press release*, December 2, 2024, <https://bit.ly/49ojir6>.

34 David McAllister, “Global Gateway: If not now, when?” *Politico*, October 25, 2023, <https://bit.ly/4fS6TOF>.

35 Manuel Widmann, “The EU Connectivity Strategy: Putting Words into Action,” *Briefing Paper No. 2*, European Institute for Asian Studies, <https://bit.ly/3DdLCAh>.

36 Tyyne Karjalainen, “European Norms Trap? EU Connectivity Policies and the Case of the Global Gateway,” *East Asia* 40: 293-316, <https://bit.ly/4dic5cl>.

37 Over the years several occasional policy documents have been focusing on the EU-Mediterranean and China-Mediterranean relationships. They include *Barcelona Declaration* (1995), *EU Common Strategy for the Mediterranean* (2000-2006), *Marseille Declaration* (2008, instituting the Union for the Mediterranean (UfM)) and *Renewed Partnership with the Southern Neighbourhood: A New Agenda for the Mediterranean* (2021). For China, these documents are limited to *Communiqué on the Establishment of the China-Arab Cooperation Forum* (2004), *Arab Policy Paper* (2016, which constitutes the most important Chinese Mediterranean policy document) and, to a lesser extent, *China's Policy Paper on the European Union* (2018).

In an era of increasing “competitive multipolarity,”³⁸ countries in the MENA region strategically balance their relationships with both the EU and China leveraging the distinct advantages each offers. This balancing act allows MENA countries to maximize benefits in areas such as infrastructure investment, trade and political influence.

3.1. China’s Mediterranean Penetration

China’s investments in the Mediterranean have been steadily growing in recent years, moving from \$5 billion in 2010 to \$48 billion in 2022.³⁹ These investments focus primarily on the transport and logistics, energy and digital sectors.

The GCC countries hold a pivotal position in China’s BRI. While Chinese investments in North Africa and Southern Europe have stagnated or even declined lately, the Gulf countries have emerged as Beijing’s key economic partners in the broader Mediterranean region. Thanks to its strategic location, this region serves as the intersection of the two BRI’s key routes: the overland “Belt” and the maritime “Road” and the region is often described as the point “where the Belt joins the Road.” China ties with the GCC include comprehensive strategic partnerships, multilateral action plans and joint initiatives. Additionally, the conclusion of a China-GCC free trade agreement could further strengthen this relationship.

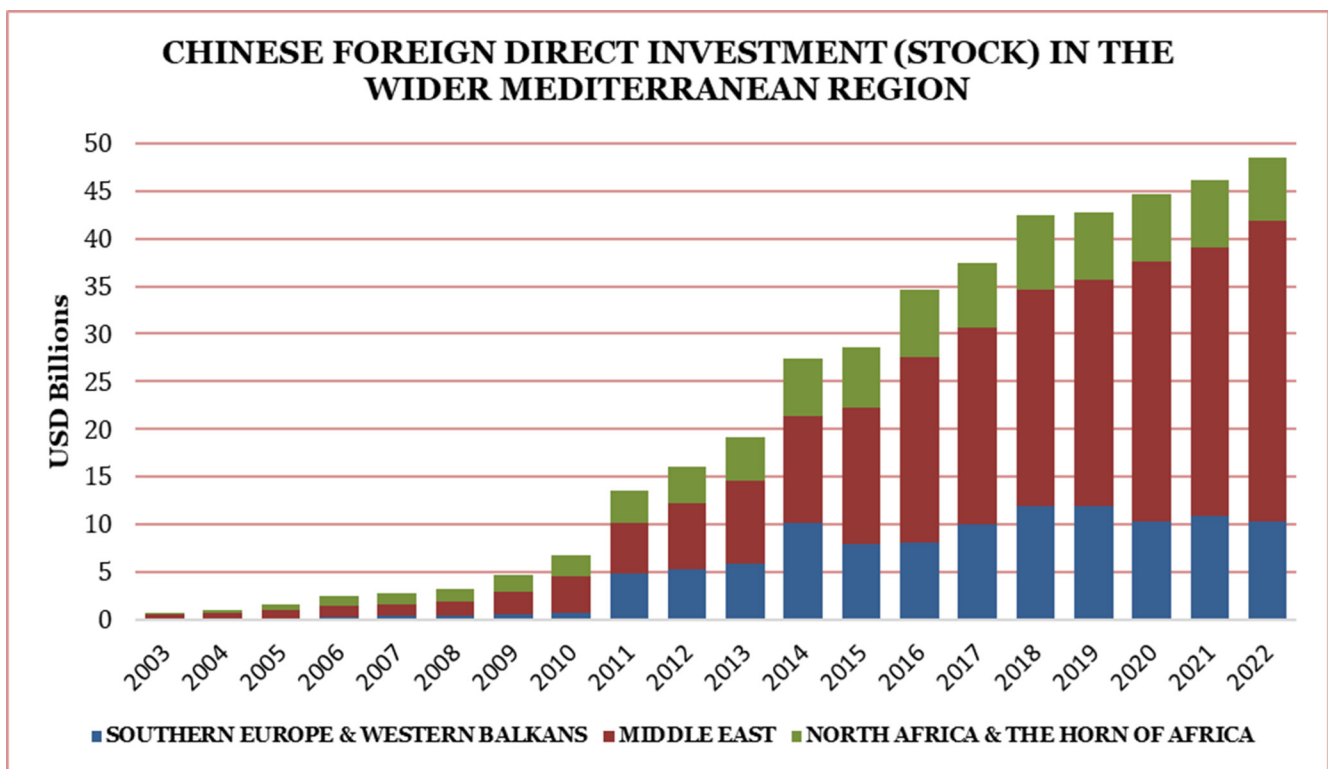


Figure 1. Chinese FDI (stock) in the Wider Mediterranean region. Source: ChinaMed Project, 2023.

China’s FDI stock in the Middle East has grown significantly, increasing by nearly 50% between 2018 and 2022, from USD 21.2 billion to USD 31.5 billion.⁴⁰ Additionally, the value of contracts awarded to Chinese firms in the region has rebounded strongly after COVID-19, reaching USD 34.5 billion in 2022, close to pre-pandemic levels. Meanwhile, GCC countries have been investing in China at an unprecedented pace. The value of acquisitions and investments by Gulf companies in China surged more than 1,000% year-on-year to USD 5.3 billion in 2023, largely driven by corporate-level and joint

38 Valeria Talbot and Karim Mezran, “The MENA Region in Times of Multipolarity,” *ISPI Dossier*, ISPI, October 26, 2023, <https://bit.ly/49syCmQ>.

39 Leonardo Bruni, “Examining New Data on Chinese Foreign Direct Investment across the Wider Mediterranean Region,” *ChinaMed Project*, December 2023, <https://bit.ly/3ZGOBue>.

40 Data from the ChinaMed Project.

petrochemical projects.⁴¹ On the other hand, Chinese firms are exploring attractive opportunities across the Gulf in sectors such as renewables, construction, electric vehicles and technology. Beyond the realms of trade and investment, financial collaboration is emerging as a crucial focus of cooperation. There has been a rise in memoranda of understanding concerning cross-market financing structures, index collaborations, currency swaps and even digital currency development, signaling a deepening partnership in the financial sector.⁴²

In North Africa and Southern Europe, maritime infrastructure holds particular significance for Beijing, as demonstrated by the increasing value of Chinese investments in Mediterranean ports.⁴³ Since the early 2010s, China's penetration into this sector has been substantial, with state-owned giants like COSCO Shipping Ports and China Merchants Port Holdings acquiring stakes in seven key Mediterranean ports. Currently, COSCO holds minority stakes in Bilbao, Genoa, Istanbul and Valencia, while China Merchants Port has interests in Istanbul, Marseille and Marsaxlokk (Malta). Moreover, Chinese conglomerates have secured strategic positions at critical entry points in the Mediterranean: COSCO in Port Said near the Suez Canal and China Merchants Group in Tangier-Med near the Strait of Gibraltar, via Terminal Link. Additional ports are reportedly under negotiation or consideration, including Bizerte (Tunisia), Ploče (Croatia), Taranto and Trieste. This activity underscores China's intent to strengthen its maritime foothold in the Mediterranean as part of its broader global connectivity strategy. Indeed, a peak in activity occurred between 2016 and 2019, following the announcement of the BRI.⁴⁴

These investments have notably bolstered China's exports to the region and positioned it as a key influencer at several gateway ports. Beijing's strategic focus on developing and utilizing small and medium-sized ports has significantly increased container traffic outside traditional Mediterranean hubs. This shift has led to a decline of large hubs like Gioia Tauro, showcasing China's capacity to reshape the hierarchy of Mediterranean ports. In parallel, the Greek port of Piraeus, under Chinese COSCO's majority ownership since 2016, has become a critical hub for Beijing's trade operations. Enhanced intermodal links at Piraeus have streamlined China's trade flows into Europe.⁴⁵

While these BRI investments are actively reshaping the Mediterranean port system, their contribution to broader economic integration remains unclear, as it is not clear if and how the Chinese ports investments support local industrial policies and enhance hinterland connectivity in host countries. This raises questions about the long-term benefits for regional economies and their alignment of these investments with local development priorities.

Looking ahead, the future trajectory of the BRI is likely to further leverage existing port acquisitions and infrastructure, while shifting its focus toward green energy and telecommunications equipment.⁴⁶ China's green transition industries, suffering from overcapacity, require new export outlets, while telecom giants like Huawei and ZTE need to expand their presence in neutral markets to offset restrictions in western countries. This pivot is particularly significant as China embarks on a new wave of investments in North Africa, focusing on renewable energy and electric vehicle projects.⁴⁷ Some of these initiatives aim to use North Africa as an export base to Europe and the U.S., exploiting free trade agreements to circumvent tariff barriers. This approach positions North Africa as a key area in Beijing's broader strategies.

China's investment in Europe's non-maritime transport infrastructure, though smaller than its maritime initiatives, has gained momentum since 2016. By financing projects through BRI loans or offering services along transport lines without directly integrating into the EU's TEN-T core network—as in the Western Balkans—China continues to exert significant economic and geopolitical influence.⁴⁸ A similar pattern is visible in North Africa, where China has contributed to major

41 Layla Ali, "Gulf Investments in China: A New Era of Strategic Partnerships," *Commentary*, ISPI, June 18, 2024, <https://bit.ly/4g2xLvk>.

42 Alessia Amighini, "Deepening Cooperation Between China and the Gul," *Commentary*, ISPI, November 22, 2024, <https://bit.ly/4gmY04l>.

43 Ouail Oulmakki et al., "The Implications of Chinese Investments on Mediterranean Trade and Maritime Hubs," *Journal of Shipping and Trade* 8 (2023):28, <https://bit.ly/4gtWb1A>.

44 Timothy Hildebrandt, "Chinese Stakes in European Ports: Geopolitical Threat or Mere Business Venture?" *Future CHOICE Papers*, China Observers in Central and Eastern Europe (CHOICE), January 2023, <https://bit.ly/3OJob4M>.

45 Laia Comerma Calatayud, "The complex relationship between Europe and Chinese investment: The case of Piraeus." *China in Focus Working Paper* No. 1, King's College Lau China Institute, 2023, <https://bit.ly/3DdMjJZ>.

46 Banach and Gunter. 2023.

47 Oxford Analytica, "Chinese will focus on green energy in North Africa," *Expert Briefings*, August 15, 2024, <https://bit.ly/3VtzZeX>.

48 European Parliament, Policy Department for Structural and Cohesion Policies, "Chinese Investments in European Non-Maritime Transport Infrastructure," *Study*, December 2023, <https://bit.ly/3Vq3pdW>.

in-land infrastructure projects.⁴⁹ In Algeria, Chinese firms have contributed to the \$6.25 billion East–West Highway and, as of 2023, agreed to build 6,000 kilometers of new railway lines. In Egypt, investments of \$600 million have targeted upgrades to the railway network. In November 2024, China’s Gezhouba has bagged a \$225 million contract for Morocco’s Kenitra-Marrakech high-speed rail line. These efforts underscore China’s broader commitment to fostering economic ties and connectivity across the Mediterranean.

3.2. The EU as a Key Mediterranean Actor

Despite China’s penetration, the EU remains a significant economic player in the Mediterranean. European FDI stock averaged around \$300 billion per year since the mid-2010s⁵⁰ and the EU more than matches China in terms of trade with Mediterranean countries.⁵¹

However, over the past decade Europe’s primary interest in the Mediterranean has been the control of migration flows, as evidenced by agreements with Turkey, Tunisia and Egypt. Meanwhile, the MENA region, particularly after the Arab Uprisings, has experienced an unprecedented period of conflict and instability, exacerbating longstanding socio-economic challenges. During these times, the EU has been unwilling or unable to play a significant political role in the Mediterranean, while multiple crises have further worsened the region’s economic outlook, political risks and investment climate. Additionally, the authoritarian restoration which has followed the 2011 revolutions has increased patronage and corruption in many countries, making north-south investment and economic cooperation less appealing. All in all, European influence in the Mediterranean has weakened, also as a result of inconsistent policies and of lack of EU foreign policy cohesion towards the region.⁵²

Regarding the GG, its activities in the Mediterranean remain relatively limited compared to other regions. To date, the GG has mobilized €24 billion for 19 flagship projects in the southern Mediterranean,⁵³ with investments primarily concentrated in climate and energy, transport and logistics and digital infrastructure. However, this data does not include the investments made independently by EU Member States. Additionally, major initiatives predating the GG—such as the InfraMed Infrastructure, launched in 2010 as an investment vehicle for Mediterranean infrastructure with a commitment of €385 million—require better alignment with the GG to maximize synergies and efficiency.

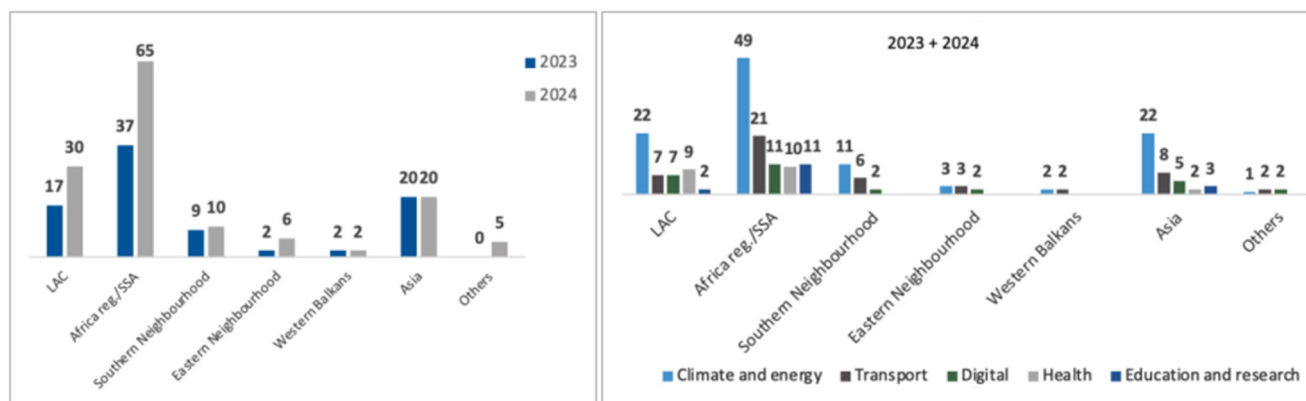


Figure 2. Number of flagship projects per sector and geography (2023 and 2024). Sources: Bilal and Teevan, 2024

49 Jonathan Fulton, “Beijing is making inroads in North Africa,” *MENASource*, October 15, 2024, <https://bit.ly/49GpFXb>.

50 Counting EU institutions and individual Member States. See: ECFR, “Mapping European leverage in the MENA region,” December 2019, <https://bit.ly/49q8b0U>.

51 Alberto Rizzi and Arturo Varvelli, “Opening the Global Gateway: Why the EU should invest more in the southern neighbourhood,” *Policy Brief*, ECFR, March 14, 2023, <https://bit.ly/4g0bEpl>.

52 ECFR, 2019.

53 Valeria Lauria, “Investing in the Mediterranean: Strategies for Infrastructure Development,” In *IEMed Mediterranean Yearbook 2024* (Barcelona: IEMed, 2024, 79-85), <https://bit.ly/3CZ3M8W>

In the energy sector, where the GG is heavily involved, several transformative projects are underway. The *ELMED* project (€920 million) will establish Tunisia's first submarine electrical link to the EU. Another major initiative is *GREGY*, an electrical interconnection between Greece and Egypt, initially budgeted at €4.2 billion. Additionally, several of the 46 flagship projects earmarked for 2025 align with these priorities. For example, Tunisia and Algeria are part of plans for a *Southern Hydrogen Corridor* and the *Medlink Project*, focused on importing renewable energy from North Africa. Morocco is slated to join a *Large-scale Global Green Hydrogen Project*, while Egypt's *Nexus for Food, Water and Energy (NWFE)* program will see significant support, particularly in its energy component.⁵⁴

In transport, the GG has focused so far on rehabilitation and upgrading infrastructure, like in the case of the ONCF Rail Rehabilitation and the Tanta-El Mansoura-Damietta Railway Upgrading projects, in Morocco and Egypt respectively. A regional transport initiative underdevelopment is the *Global Maritime Green Corridor*, which aims to produce six million tons of methanol annually for green shipping in the Mediterranean.⁵⁵

In digital connectivity, a sector with high growth potential in the Mediterranean, the EU has provided financial support to the €342 million *MEDUSA* project. This initiative aims to establish a submarine fiber-optic infrastructure connecting Cyprus, France, Italy, Portugal and Spain with Algeria, Egypt, Morocco and Tunisia. The cables are expected to be laid between 2024 (Western Mediterranean) and 2025 (Eastern Mediterranean).

In conclusion, these project show that the external dimension of the EU's twin transitions indeed offers significant opportunities for partnerships, presenting clear competitive advantages that the EU could further leverage. However, in spite of some progress, there is still considerable ground to cover. For instance, projects like *ELMED*, have been on the agenda long before the introduction of the GG. Although it is common for large-scale energy and connectivity projects to have extended planning and implementation timelines, this has led to criticism of the GG as being merely a catch-all brand for initiatives the EU has already been pursuing in the region. In other words, the GG would only be old wine in new bottles.

In addition, Europeans are not in the lead in ports and logistics investment in the Mediterranean despite geographic proximity and the high strategic stake of the sector. Indeed, only in 2024 the European Parliament has adopted a resolution on building a comprehensive European port strategy, emphasizing the importance of the GG's cooperation with the U.S. and the G7 to compete with, resist or provide alternatives to China's offer.⁵⁶ The GG will need to clearly demonstrate its added value and strategic contribution.

Finally, it is evident that the Mediterranean and even more so the MENA region, requires far more than the €24 billion that was announced. This is especially true considering the region's strategic importance to Europe, its growing role as an energy supplier and its emerging position as a hub for nearshoring.⁵⁷

Conclusions:

A New Political Momentum for Reshaping the Broader Mediterranean Space?

The new EU Commission, which began its mandate on 1 December 2024, will face the critical challenge of adapting its broader policies for the Mediterranean region and Africa to the evolving realities of this macro-region. The war in Ukraine has highlighted the strategic importance of this macro-area for the EU's energy security. Simultaneously, fostering cooperation on the energy transition with MENA and Africa is crucial for Europe to achieve the objectives of the Green Deal. Countries in the Mediterranean are also poised to play an increasingly significant role in Europe's pursuit of strategic autonomy and the future nearshoring strategies of European businesses. Morocco and Egypt, in particular, are demonstrating promising developments in this regard.

While negative scenarios continue to challenge MENA and Africa, the macro-region also reveals promising signs of positive change. Renewable energy stands out as a sector with significant untapped potential, encompassing green electricity trade, solar and wind energy production, green hydrogen initiatives and collaboration on the supply of critical minerals.

54 Council of the EU, 2024.

55 Transport & Environment, "Europe-Asia Green Corridors: Case for Morocco as a Green Shipping H2 Hub," Report, May 2024, <https://bit.ly/3D24lIP>

56 European Parliamentary Research Service, "Global Gateway 2030. Future of Europe's Global Infrastructure Bid," In-depth Analysis, July 2024, <https://bit.ly/4gF0pkD>

57 Rizzi and Varvelli, 2023.

Although overall European FDI in MENA remains stagnant—except for increasing flows to GCC countries—the above dynamics show that the region’s importance is growing. Revamping the GG alone is unlikely to be sufficient to significantly advance the EU’s ambitions in the Mediterranean. Europe must also address existing obstacles to renewed cooperation, such as regulatory frameworks and the infrastructure gap. But even more importantly, it needs to strengthen the political dimension of its relationship with these regions. Amidst the ongoing “scramble for the Mediterranean,”⁵⁸ the EU urgently requires a stronger and more coherent strategic vision. To further build on this potential, the EU should prioritize the Africa-Mediterranean macro-region within its connectivity strategies. In addition to a more ambitious political vision, such an approach would require leveraging connectivity as a multidimensional tool to forge robust links between Europe, the MENA region and Africa.

The EU’s connectivity approach could help the EU-Mediterranean-Africa strategy in several ways: it would facilitate tackling issues such as the regulatory frameworks or the infrastructure gap in transport, logistics, energy and digital sectors; it would create political momentum for public-private partnerships in these capital-intensive sectors; it could also boost European companies’ nearshoring and friend-shoring strategies, positioning the EU as an engine of sustainable growth for the broader region.

Furthermore, experts suggest that the GG should move beyond simply competing with China’s BRI and focus more on addressing the specific needs of partner countries. There is a need for deeper, more meaningful dialogue about the long-term objectives of EU partnerships with countries in the southern neighborhood and Africa. The strategies adopted should not only safeguard Europe’s interests but also create mutually beneficial opportunities for the MENA region and Africa, ushering in a new era of win-win cooperation.

A modernization of EU-Mediterranean free trade agreements could also play a pivotal role, especially after years of unsuccessful attempts to promote Deep and Comprehensive Free Trade Areas (DCFTAs), particularly in North Africa. Given the new realities of countries like Morocco, Tunisia and Egypt—emerging as cost-competitive alternatives to Asian manufacturers such as China, Vietnam and Bangladesh in sectors like textiles, automotive components and agribusiness—the existing free trade agreements could be upgraded to further reduce barriers and facilitate investment. This would enhance supply chain efficiency and lower costs for European importers.

In the Gulf, the EU could leverage new strategic partnerships to capitalize on the economic potential of these countries’ Vision plans. By partnering in highly attractive connectivity projects and utilizing technology transfers, the EU can further strengthen its economic ties and promote sustainable growth in the region.

Finally, the EU should also invest more political capital and diplomatic resources in dialogue facilitation and mediation, to promote de-escalation, encourage homegrown regional initiatives and contribute to addressing long-standing conflicts. The region would welcome more EU involvement in this crucial areas and more EU courage is needed to positively respond to these demands.

The new portfolio for the Mediterranean in the European Commission could represent a new opportunity to launch a strategic reflection leading to a political and economic revamping of relationships within the broader Mediterranean space. In her mission statement and during the hearing in the European Parliament, the new Commissioner for the Mediterranean, Dubravka Šuica, has indicated her willingness to foster dialogue and build new strategic pacts with countries in the Mediterranean.⁵⁹ This promises, as the labelling ‘pact’ suggests, more listening and less patchwork migration deals. To further enhance its credibility, the new Commission could also consider revisiting the 2021 New Agenda for the Mediterranean, which faced significant criticism for its lack of political vision. Such revisions could involve upgrading the Union for the Mediterranean (UfM) to better align with a more ambitious and cohesive regional strategy, although this historic institution has been strangely omitted from the first releases of the new Commissioner, as some observers have noted.⁶⁰

58 Giuseppe Dentice and Valeria Talbot, “A Geopolitical Sea: The New Scramble for the Mediterranean,” *ISPI Dossier*, ISPI, July 2020, <https://bit.ly/3ZgwR7q>

59 European Parliament, “Hearing of the Commissioner-designate: Dubravka Šuica,” *Verbatim Report*, November 5, 2024, <https://bit.ly/3D3zjH3>

60 Iván Martín, “Appointment of the New European Commission I: What Mediterranean for the European Union?” *Opinion*, Policy Center for the New South, November 29, 2024, <https://bit.ly/3D6vi4l>

Within this framework, a more strategic and targeted connectivity approach in the Mediterranean would create a vast economic space and build shared Euro-Mediterranean-African prosperity for the coming decades. It would do so by fostering critical advancements in trade, energy and investment ties, turning the EU into a strong economic anchor and an engine of sustainable growth for its southern neighborhood and Africa. This would definitely increase the prospects of success in the EU strategic competition with China.

Bibliography

- Adolfsen, Jakob Feveile. “The impact of the war in Ukraine on euro area energy markets,” *ECB Economic Bulletin* No. 4/2022, European Central Bank, June 2022, <https://bit.ly/4goXihZ>.
- Alaaldin, Ranj. “Iraq’s Development Road Project: A Path to Prosperity or Instability?,” *Issue Brief*, The Middle East Council on Global Affairs, October 2024, <https://bit.ly/3ZDUqsg>.
- Ali, Layla. “Gulf Investments in China: A New Era of Strategic Partnerships,” *Commentary*, ISPI, June 18, 2024, <https://bit.ly/4g2xLvk>.
- Amighini, Alessia. “Deepening Cooperation Between China and the Gul,” *Commentary*, ISPI, November 22, 2024, <https://bit.ly/4gmYO4l>.
- Banach, Clark and Gunter, Jacob. “How China’s Belt and Road projects are shaping global trade and what to expect from the initiative in its second decade,” *MERICCS China Global Competition Tracker* No. 4., MERICS, December 2023, <https://bit.ly/41rqa5j>.
- Baruah, Darshana M. “India’s Answer to the Belt and Road: A Road Map for South Asia,” *Working Paper*, Carnegie India, August 2018, <https://bit.ly/3OITXlv>.
- Bruni, Leonardo. “Examining New Data on Chinese Foreign Direct Investment across the Wider Mediterranean Region,” *ChinaMed Project*, December 2023, <https://bit.ly/3ZGOBue>.
- Buzna, Viktor et al. “Connectivity: exploring the concepts behind today’s geoeconomic buzzword,” *MKI Long Brief*, HIIA Connectivity Center, Hungarian Institute of International Affairs, February 22, 2024, <https://bit.ly/4l2CPe>.
- Cerny, Philip G., (ed.). *Heterarchy in World Politics*. London: Routledge, 2023.
- Calatayud, Laia Comerma. “The complex relationship between Europe and Chinese investment: The case of Piraeus,” *China in Focus Working Paper*, King’s College Lau China Institute, 2023, <https://bit.ly/3DdMjJZ>.
- Council of the EU. “Global Gateway: Council endorses flagship project list for 2025,” *Press release*, December 2, 2024, <https://bit.ly/49ojir6>.
- Damen, Mario. “EU Strategic Autonomy 2013-2023: From Concept to Capacity,” *EU Strategic Autonomy Monitor Briefings*, European Parliamentary Research Service, July 2022, <https://bit.ly/3ZFSDTs>.
- Dentice, Giuseppe, and Talbot, Valeria. “A Geopolitical Sea: The New Scramble for the Mediterranean,” *ISPI Dossier*, ISPI, July 2020, <https://bit.ly/3ZgwR7q>.
- de Kluiver, Jana. “Navigating the complex terrain of China-Africa debt relations,” *ISS Today*, Institute for Security Studies (ISS), November 2023, <https://bit.ly/4f3yZ8q>.
- Deandreis, Massimo et al. “Maritime Scenario in the Mediterranean: Analysis of the Competitiveness and Investments of the Major Logistics Players,” *IAI Papers* No. 22-07, Istituto Affari Internazionali (IAI), May 2022, <https://bit.ly/3OHZzcA>.
- European Parliament. “Hearing of the Commissioner-designate: Dubravka Šuica,” *Verbatim Report*, November 5, 2024, <https://bit.ly/3D3zjH3>.
- European Parliamentary Research Service. “Global Gateway 2030. Future of Europe’s Global Infrastructure Bid,” *In-depth Analysis*, July 2024, <https://bit.ly/4gFOpkD>.
- European Parliament, Policy Department for Structural and Cohesion Policies. “Chinese Investments in European Non-Maritime Transport Infrastructure,” *Study*, December 2023, <https://bit.ly/3Vq3pdW>.

- European People's Party Group. "EU-China Relations - Towards a Fair and Reciprocal Partnership," *Strategy Paper*, March 2021, <https://bit.ly/4gmPOwg>.
- Fulton, Jonathan. "Beijing is making inroads in North Africa," *MENASource*, October 15, 2024, <https://bit.ly/49GpFXb>.
- Granados Hernandez, Marta. "Global Gateway and the EU's Digital Ambitions," Center for Strategic and International Studies (CSIS), May 19, 2022, <https://bit.ly/49sy5kQ>.
- Green, Mark A. "Debt Distress on the Road to 'Belt and Road'," *Stubborn Things*, Wilson Center, January 2024, <https://bit.ly/3BhDzC8>.
- Hildebrandt, Timothy. "Chinese Stakes in European Ports: Geopolitical Threat or Mere Business Venture?," *Future CHOICE Papers*, China Observers in Central and Eastern Europe (CHOICE), January 2023, <https://bit.ly/3OJob4M>.
- IMF. "Economic Integration in the Maghreb: An Untapped Source of Growth," *Departmental Paper Series No. 19/01*, 2019, <https://bit.ly/4g4oV0m>.
- Karjalainen, Tyne. "European Norms Trap? EU Connectivity Policies and the Case of the Global Gateway," *East Asia* 40: 293-316, <https://bit.ly/4dic5cl>.
- Lauria, Valeria. "Investing in the Mediterranean: Strategies for Infrastructure Development," *IEMed Mediterranean Yearbook 2024*, IEMed, 2024, 79-85, <https://bit.ly/3CZ3M8W>.
- Leonard, Mark. *Connectivity Wars: Why Migration, Finance and Trade are the Geo-economic Battlegrounds of the Future*, ECFR, 2016, <https://bit.ly/4fdoDTG>.
- Martín, Iván. "Appointment of the New European Commission I: What Mediterranean for the European Union?," *Opinion*, Policy Center for the New South, November 29, 2024, <https://bit.ly/3D6vi4l>.
- McAllister, David. "Global Gateway: If not now, when?," *Politico*, October 25, 2023, <https://bit.ly/4fS6TOF>.
- McBride, James et al. "China's Massive Belt and Road Initiative," *Backgrounder*, Council on Foreign Relations, February 2023, <https://bit.ly/4fdoVKg>.
- McKinsey Global Institute. "Geopolitics and the Geometry of Global Trade," *Report*, January 2024, <https://bit.ly/4fZDvWB>.
- Nickel, Carsten. "What do we talk about when we talk about the 'return' of geopolitics?," *International Affairs* 100(1): 221-239, <https://bit.ly/3OJV01s>.
- Okano-Heijmans, Maaik. "The EU's Connectivity Strategy 2.0: Global Gateway in the Indo-Pacific," In Y. Hosoya and H. Kundnani (eds.), *The Transformation of the Liberal International Order: Evolutions and Limitations*, Singapore: Springer, 2024, 23-54, <https://bit.ly/3ZDiVWv>.
- Okumu, Paul and Fattibene, Daniele. "The Global Gateway Three Years Later – An African Reality Check for the Next Commission," *ETTg Blog*, European Think Tanks Group (ETTg), September 24, 2024, <https://bit.ly/4f448bR>.
- Oulmakki, Ouail et al. "The Implications of Chinese Investments on Mediterranean Trade and Maritime Hubs," *Journal of Shipping and Trade* 8 (2023):28, <https://bit.ly/4gtWb1A>.
- Oxford Analytica. "Chinese will focus on green energy in North Africa," *Expert Briefings*, August 15, 2024, <https://bit.ly/3VtzZeX>.
- Rizzi, Alberto. "The infinite connection: How to make the India-Middle East-Europe economic corridor happen," *Policy Brief*, ECFR, April 2024, <https://bit.ly/49GIYAN>.
- Shirley, Claire. "A gateway to partnership," *EIB Stories*, European Investment Bank (EIB), June 2, 2023, <https://bit.ly/3Bc9mo5>.

- Talbot, Valeria and Mezran, Karim. “The MENA Region in Times of Multipolarity,” *ISPI Dossier*, ISPI, October 26, 2023, <https://bit.ly/49syCmQ>.
- Teevan, Chloe and Bilal, San. “The Global Gateway at two: Implementing EU strategic ambitions,” *Briefing Note* No. 173, ECDPM, November 2023, <https://bit.ly/3OI3FRT>.
- Transport & Environment. “Europe-Asia Green Corridors: Case for Morocco as a Green Shipping H2 Hub,” *Report*, May 2024, <https://bit.ly/3D24IIP>
- Turak, Natasha. “Russia’s war is threatening the Middle East’s food security,” *CNBC*, April 28, 2022, <https://bit.ly/3VqxMRM>.
- Um, Paul Nomba. “Building forward better in MENA: How infrastructure investments can create jobs,” *World Bank Blogs*, November 4, 2020, <https://bit.ly/4f5i8BW>.
- UNCTAD. *Review of Maritime Transport 2024: Navigating Maritime Chokepoints*, 2024, <https://bit.ly/49mrOyT>.
- Vandermeeren, Frank. “Understanding EU-China Exposure,” *Single Market Economics Briefs* No. 4., European Commission, January 2024, <https://bit.ly/49mrMPF>.
- Widmann, Manuel. “The EU Connectivity Strategy: Putting Words into Action,” *Briefing Paper* No. 2., European Institute for Asian Studies, <https://bit.ly/3DdLCAn>.
- World Bank. “Trading Together: Reviving Middle East and North Africa Regional Integration in the Post-Covid Era,” *MENA Economic Update*, October 2020, <https://bit.ly/4f9hKT4>.



Mediterranean Platform

Founded in 2022, and directed by Prof. Luigi Narbone, the Mediterranean Platform is a research, dialogue, and educational programme at the School of Government, Luiss Guido Carli. It offers a space for collective reflection on the opportunities and challenges of the Mediterranean region and promotes informed policymaking and advocacy at the national and transnational levels.

mp.luiss.it

School of government, Luiss Guido Carli

Luiss School of Government SoG is a graduate school training high-level public and private officials to handle political and government decision-making processes. Founded in 2010, SoG has become one of the most relevant institutions in Europe for teaching and research. As part of Luiss University is now ranked among the top 15 in the world (and 1st in Italy) for Politics and International Studies according to the QS World University Rankings by Subject 2023.

sog.luiss.it

© Luiss Guido Carli University, 2024. All rights reserved. Licensed to the European Union under conditions. Editorial matter and selection © Luigi Narbone and Abdelkarim Skouri, 2024

This work is licensed under the [Creative Commons Attribution 4.0 \(CC-BY 4.0\) International license](https://creativecommons.org/licenses/by/4.0/) which governs the terms of access and reuse for this work. If cited or quoted, reference should be made to the full name of the author(s), editor(s), the title, the series and number, the year and the publisher.

This publication was produced with the financial support of the European Union. Its contents are the sole responsibility of the author and do not necessarily reflect the views of the European Union.

Views expressed in this publication reflect the opinion of individual authors and not those of Luiss Guido Carli.

Published by:
Luiss Guido Carli - Viale Pola 12, 00198 Rome, Italy
sog@luiss.it