



North Africa in an Era of Great Power Competition

Challenges and Opportunities for the United States

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EXECUTIVE SUMMARY

North Africa is among the many world regions overshadowed by crises in Europe, the Middle East, and the Asia Pacific.* Yet the countries of North Africa—Morocco, Algeria, Tunisia, and Libya—are strategically significant to U.S. defense and economic interests, both in their own right and even more strikingly in the context of current geopolitical competition with Russia and China.

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The United States has many reasons to focus on the region, including:

- Its location, which is critical to the security of NATO and European allies
- Vast energy resources, notably in Libya (home to Africa’s largest proven oil reserves) and Algeria (home to the world’s tenth-largest gas reserves)
- Russian inroads, especially in Libya, where Moscow is actively transitioning the Wagner Group—now also known as the Africa Corps—to a formal presence and possibly securing basing rights
- The prospect of migrant crises, stoked by Russia, that threaten European stability
- Jihadist threats, especially in the ungoverned spaces of Libya and the Sahel, and in the context of Tunisia’s failing political-economic system, which could reignite dangers to U.S. personnel and citizens in the region
- Growing Chinese influence that could expand Beijing’s continental stake and access to the Mediterranean Sea and Atlantic Ocean

The Russian and Chinese presence in North Africa varies substantially by country and in form. Russia’s military involvement, for example, ranges from fairly deeply embedded in Libya to almost completely absent in Morocco. Similarly, both Russian and Chinese economic activity—particularly trade—is high in some countries, such as Algeria and Morocco, but relatively low elsewhere, such as in Tunisia. Against a disjointed but increasingly active Russian and Chinese presence in North Africa, the United States has an opportunity to blunt or reverse the advances of these competitors. The perennial challenge for America has been to elevate North Africa to a policy priority. Yet when viewed through the lens

of great power competition, the region presents opportunities for Washington to address important areas.

The following recommendations—divided into regional and country-specific issues—represent areas to improve U.S. policy in North Africa and simultaneously counter Russian and Chinese inroads.

RECOMMENDATIONS FOR THE BROADER REGION

The following policy ideas apply to the whole North Africa region:

Encourage cooperation to address natural disasters and climate change. In the second half of 2023 alone, Algeria, Morocco, and Libya suffered extensive damage from wildfires, earthquakes, and flooding. As such incidents become more frequent, North African states can benefit from exchanging information and best practices and preparing coordination mechanisms for future incidents that cross national borders. Washington can encourage cooperation in the face of accelerating climate change by facilitating regional dialogues among civil society and other relevant actors that deal with challenges facing North Africa.

Focus on economic and livelihood issues.

Democracy promotion remains an important part of U.S. foreign policy, and America should remain true to its values. That said, when it comes to North Africa, a more effective approach would be to prioritize the needs of the population—particularly through protection against economic instability and climate shocks—and build closer relationships based on those interests. Indeed, this is where Russia and China tend to make headway. The United States should therefore review practical programs that it can provide, especially in the commercial, business, energy,

and trade sectors, and seek to extend public-private initiatives that would assist North African populations where they need the most help.

Coordinate with the private sector to offer commercial alternatives to China and Russia.

China, in particular, has the ability to direct state-associated companies to make deals in resource-stricken countries, often at a more competitive price point than Western alternatives. When Western companies have successfully outbid their Chinese competitors, they have often done so after coordination between Western countries and China's potential customers. For instance, Jordanian telecommunications companies recently selected European firms over Chinese firms for their 5G networks after years of concerted U.S. and Western discussions with Amman. A similar opportunity exists in North Africa, where Morocco and Tunisia have yet to select their own 5G provider.

Convey to regional countries the risks of security ties with China. A close security partnership with China poses risks to the sovereignty of host nations, an issue of particular sensitivity in North Africa. Even seemingly commercial projects, such as those involving critical infrastructure, can open the door to Chinese interference that can affect relationships with other states. For U.S. partners in the region—particularly Morocco and Tunisia—America should consult closely on establishing clear baseline parameters for relations with China that safeguard security cooperation with Washington.

Emphasize the poor track record of Russia and China as security partners. Although Russian officials have acknowledged the importance of countering terrorism emanating from North Africa, they often do so as a pretext to establish influence. Extremist activity is a major concern for North African governments given the region's history, and terrorism threats will likely worsen as Libyan authorities struggle to contain militias and

Sahel governments reel from instability. Beijing, for its part, has done little to engage in counter terrorism-related issues beyond those that directly touch its own interests abroad. Such weakness offers Washington an opportunity to highlight its advantages over Beijing and Moscow in areas of transparency, technology, knowledge, and experience and to increase security cooperation where appropriate.

Work more closely with European and other allies where interests align. A rolling migration crisis is among the reasons Europe's southern neighborhood deserves close attention. As in the past, the Kremlin will likely use migration as a cudgel against Europe, underscoring why the United States should increase its attention to North Africa now, including by supporting European initiatives (e.g., on migration management and renewable energy) that lay the groundwork for future cooperation.

Project an alternative narrative. Russia and China have been sending a clear message in North Africa that they will support development and security with “no strings attached”—i.e., no expectation of steps toward democracy—although such support is undoubtedly associated with other “strings” such as debt traps. Rather than simply play defense and counter disinformation, Western governments must unapologetically project their own narrative, whether about Russia's invasion of Ukraine, China's mistreatment of its Muslim Uyghur population, or any other issue. Ultimately, the West needs to make clear that the arrangements advanced by Moscow and Beijing will not allow North African countries to develop economically while also retaining their sovereignty. In addition to focusing on local and regional media, the United States can enhance its influence by devoting more resources to cultural exchanges—e.g., study tours, English-language courses and clubs, and scholarships—that help reorient participants' worldviews toward a liberal model.

COUNTRY-SPECIFIC RECOMMENDATIONS

These recommendations apply to the individual North African states:

Shore up Morocco as the strategic anchor for U.S. engagement in North Africa. Morocco is the most stable American partner in North Africa, and Washington must reinforce the countries' strong security partnership and sustain existing economic and security assistance with the goal of blunting Chinese and Russian advances. The United States should also monitor areas such as Morocco's energy imports from Russia and reiterate its support for Morocco in areas beyond security, including through technical assistance to manage water scarcity. The United States can expand programs through the Development Finance Corporation and show its commitment to resolving the Western Sahara conflict by reiterating its support for the UN special envoy and urging "concerned parties," including Algeria, to resume roundtable talks.

Deepen defense and business relations with Algeria. The United States should continue to warn Algiers of the perils of a close security relationship with China and be prepared to address Algeria's concerns if Beijing's actions jeopardize the relationship. Washington likewise needs a closer defense dialogue with Algiers on U.S. end-user agreements and their perceived risks to Algerian sovereignty, as well as on the risks of purchasing communications and surveillance technology from China.

Reinforce Tunisia against long-term vulnerabilities such as climate change. The United States has rightly decided to continue investing in its military partnership with Tunisia despite concerns about President Kais Saied's authoritarian measures. Washington should additionally support Tunisia against Russian and Chinese encroachment by helping the country mitigate the effects of climate change and boosting private-sector development of advanced technological industries. It could begin doing so by reinvigorating the Tunisian American Enterprise Fund and exploring new projects through the Development Finance Corporation.

Pressure Haftar to stop cooperating with Russia. Russia's military presence in Libya remains especially concerning for reasons connected to stability, security, and control of natural resources, and Moscow's acquisition of a naval base or even docking rights would pose an acute threat to NATO. The planned reopening of the U.S. embassy in Tripoli will be useful for freeing up resources and coordinating with like-minded partners in countering Russian encroachment.¹ Yet eastern-based warlord Khalifa Haftar provides Russia with a gateway to the Sahel as well as East Africa, potentially facilitating power projection and mineral extraction activities. If UN initiatives to produce elections fail and if Haftar does not adhere to U.S. warnings to stop obstructing peace efforts, Washington should sanction him and his family under authorities including the Global Magnitsky Act. Washington should also work with Egypt and the UAE especially to convey to Haftar's clique the serious consequences of deepening his relationship with the Kremlin.

North Africa is among the many world regions overshadowed by crises in Europe, the Middle East, and the Asia Pacific. Yet the countries of North Africa—Morocco, Algeria, Tunisia, and Libya, referred to collectively as the Maghreb—are strategically significant to U.S. defense and economic interests, both in their own right and even more strikingly in the context of current geopolitical competition with Russia and China.

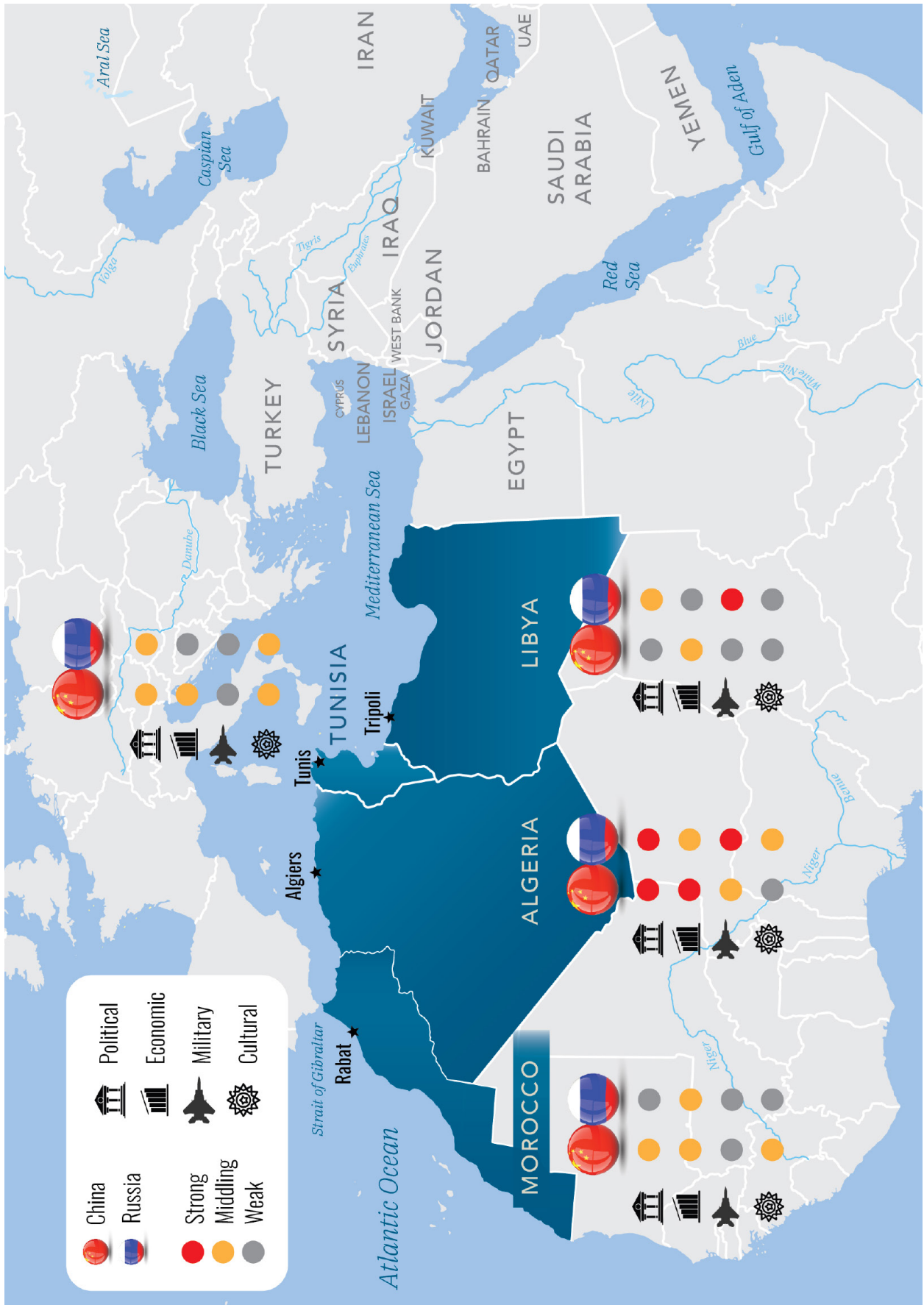
The United States should care about North Africa for the following reasons:

- Its location is critical to the security of NATO and European allies.
 - The region holds vast energy resources. Libya has the largest proven oil reserves in Africa, and Algeria has the world's tenth-largest gas reserves. The region also hosts important mineral and other resources critical for renewable energy.
 - Russia is making steady military inroads in North Africa, especially Libya, where it is actively transitioning the Wagner Group—now semiofficially rebranded as the Africa Corps—to a formal presence and possibly securing basing rights that threaten U.S. and NATO interests.
 - Instability in North Africa can spawn migrant crises, stoked by Russia, that threaten the political-economic stability of European countries.
 - The region is likewise vulnerable to jihadist threats, especially in the ungoverned spaces of Libya, Sahel areas to the west, and in the context of Tunisia's failing political-economic system, which could reignite dangers to U.S. citizens and personnel stationed there.
 - Growing Chinese influence in the region could strengthen Beijing's position on the African continent, while expanding its access to the Mediterranean Sea and Atlantic Ocean.
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This paper examines the Russian and Chinese presence in North Africa across four dimensions—political, economic, security, and cultural—treating the cases of Morocco, Algeria, Tunisia, and Libya discretely (see figure 1 for Russian and Chinese levels of influence by country). The content focuses on roughly the Arab Spring period to the present, or a little more than a decade, and emphasizes the perspectives of regional countries rather than those of the two great powers in question. The study does not address Egypt because, while technically in North Africa, it is distinct from the other countries in several ways. Not only is it more intricately tied to Levantine and Gulf Arab politics as a result of its location and eastward orientation, it is also significantly larger in population and GDP. Cairo is moreover one of Washington's most important security partners in the region, suggesting that it would warrant its own separate study on these questions.

For each of the four North African countries under discussion, this paper attempts to tell the story of current Russian and Chinese influence. Morocco, for example, has seen strong Chinese economic activity but little from Russia. The longstanding Algerian relationship with Russia has allowed Moscow to exert significant influence, but not enough to undermine Algeria's fierce insistence on political independence. Both Russia and China have shown interest in developing closer ties with Tunisia, but these have so far remained limited due to a variety of internal factors. In Libya, Russian military intervention has been strong, versus virtually nothing from China. The paper concludes with a summary of major trends and several policy recommendations for the U.S. government.

Figure 1. Russian and Chinese Strength in North Africa by Sector



Background: The United States in North Africa

North Africa is rich in energy resources, including oil and gas as well as wind, solar, and critical minerals.² It is also located at a strategic continental crossroads, with the northern tip of Morocco a mere nine miles from Spain and Tunisia's coast roughly two hundred miles from Italy.

The countries of North Africa are distinct in being integral to the Arab world and Africa alike. For example, although all four countries belong to the Arab League, they were also represented at the 2022 Africa Summit in Washington. Morocco and Algeria have two of the largest economies on the continent and serve as important counterterrorism partners to the West.³ Finally, each of the four countries is closely linked to Europe, notably when it comes to energy dynamics and the perennial challenges posed by migration. Europe also hosts large diasporas from these countries who send home significant remittances.

Despite these features, North Africa has never been a top priority for the United States.⁴ Furthermore, aware of the great diversity in the region and lack of integration among its states, the United States has mostly dealt with countries on a bilateral basis.⁵ The four nations treated here vary in governance and economic structure, as well as in size, ideological makeup, and even demographics. The only historical attempt to form a regional bloc, the Arab Maghreb Union, has been defunct for years.⁶

Broadly, U.S. goals in these four North African countries center on preserving stability. Although Libya is the only country currently experiencing violent internal conflict, the situation elsewhere has often been precarious: Algeria experienced its own decade of civil war from around 1992 to 2002, and the region as a whole was shaken by the Arab uprisings of 2011. In general terms, the United States has engaged most in the region when facing an immediate crisis or when asked to do so by allies. There is little sense of an overarching U.S.-initiated strategy to address the long-term risks of climate change and lack of economic opportunity, especially among youth, as well as poor

governance, factors that prime the region for extremism and mass migration. Great power competition, in addition to the risks just outlined, should compel the United States to take North Africa more seriously.

The next section reviews how the United States has broadly engaged with each country.

Morocco

Morocco is a constitutional monarchy where power is meant to be shared between the hereditary monarch and an elected legislature. In 1777, Morocco became one of the first states to recognize American independence, and the two countries have long maintained a close partnership, reinforced after Morocco attained independence from France in 1956. Today, defense is at the core of that relationship: strong defense ties date to the Cold War, when the kingdom purchased arms from the United States and hosted American forces at naval stations in the country.⁷ Morocco today hosts African Lion, the largest U.S.-led multinational exercise on the continent, and remains a key arms purchaser and counterterrorism partner. In 2004, the United States designated Morocco as a major non-NATO ally, and since 2018 Rabat has received roughly \$70–80 million annually from Washington.

Morocco and the United States have also enjoyed a fair amount of economic and cultural exchange. Although Morocco's strongest trading partners have traditionally been in Europe—notably, France and Spain—its free trade agreement with America dates back to 2004;⁸ bilateral trade is now roughly at \$6.8 billion per year. American-funded educational exchange programs are also relatively popular with Moroccans. For example, the Fulbright Program offers eight English teaching assistant awards and eight open study/research awards for Moroccans, more than any other Maghreb country and on par with other close American partners in the Middle East such as Jordan and Egypt. Morocco has hosted more than five thousand Peace Corps volunteers since the program began there in 1963—more than any other Arab country. Hundreds of thousands of American tourists also visit Morocco every year.

Algeria

Algeria's experience with colonization was the most intense of all the Maghreb countries, and ended following a protracted, brutal war. This legacy shaped Algeria's fierce insistence on nonalignment and noninterference, as well as the military's close involvement in governing. Economically, Algeria has socialist orientations, and the country demonstrated a marked commitment to self-sufficiency in its early decades of independence.

Thus, although Algeria-U.S. ties have always been cordial, Algiers has kept at a distinct distance from Washington since independence in 1962. In recent years, the United States has engaged more actively with Algeria, likely at least in part to avoid alienating the country following the 2020 recognition of Moroccan sovereignty over Western Sahara (see box, "The Issue of Western Sahara"). Although the Biden administration has not reversed the policy realized under its predecessor, it has sent several high-level visitors to Algiers, such as the deputy

secretary of state in March 2022 and the National Security Council Middle East coordinator that December.⁹

Nor are economic ties particularly robust, although Algeria is an important supplier of gas for several European U.S. allies, and American gas majors such as Chevron have been pursuing potential deals for years. In the defense arena, military-to-military cooperation has been a key focus, including in counterterrorism as well as security in the regional, maritime, and cyber realms.¹⁰ Russia, however, provides the vast majority of arms to Algeria, and U.S. assistance is minimal with the exception of humanitarian aid to the Sahrawi refugee camps in the southwest.¹¹ Algeria notably has among the highest Human Development Index levels across North Africa.¹² The United States mainly engages the Algerian military through International Military Education and Training funds, and generally appears poised to continue its current level of engagement in the country—although Algeria's aversion to U.S. end-user restrictions could limit its purchases of American weapons.

The Issue of Western Sahara

The approximately 100,000-square-mile territory known as the Western Sahara, which is considered by the United Nations to be "non-self-governing," has precipitated intractable bilateral Morocco-Algeria tensions since the mid-1970s, when the Spanish left Western Sahara. Algeria backs the independence movement known as the Polisario Front, which contests Morocco's claim to sovereignty over the territory. Attempts to achieve a resolution in a UN framework have not succeeded, and negotiations have not taken place since about 2019. Instead, Morocco has sought to persuade countries to recognize its sovereignty claim in exchange for stronger bilateral relations.

The United States has been heavily involved in international mediation efforts over the territory and holds the pen for the mandate text of the peacekeeping mission, known as the UN Mission for the Referendum in Western Sahara (MINURSO). Morocco's 2007 autonomy proposal was presented after strong urging from Washington, although the Polisario—which did not want the option of independence taken off the table—continued to insist on holding a referendum to decide the status of the territory. For the next thirteen years, U.S. policy recognized the proposal as "serious, credible, and realistic" while calling on both sides to negotiate "a mutually acceptable political solution."¹³ In 2020, the policy changed abruptly when the United States extended diplomatic recognition to Moroccan Sahara in the context of the Israel-Morocco aspect of normalization of diplomatic relations.



In 2020, the United States recognized Moroccan sovereignty over the internationally disputed territory of Western Sahara.

 Polisario Front-controlled area  Morocco-controlled area



Tunisia

When the eighty-year French protectorate ended in 1956, Tunisia formed a republic, adopting its first constitution in 1959. Like Morocco, Tunisia has since independence been generally Western-oriented and has retained close ties with its former colonizer. Given geographic proximity, Italy has also long held a strong influence in Tunisia. Ties with the United States date back to the late eighteenth century, when the two countries signed a Friendship Treaty, and have remained firm since. The last two decades have seen discussion of a free trade agreement, with Tunisia having had a deal with Europe (known as an association agreement) since 1998.¹⁴ In 1962, Tunisia distinguished itself as the first Arab country to open a Peace Corps program, and hosted roughly two thousand volunteers before the program closed in 1996.¹⁵

Tunisia rose as a U.S. priority after popular uprisings led to the overthrow of autocrat Zine al-Abidine Ben Ali in 2011, and it later emerged as the most likely Arab Spring country to become a democracy, bolstered by the creation of democratic intuitions. Meanwhile, growing extremist activity in the region prompted Washington to also focus on strengthening Tunisia's security sector and to develop a security partnership. Since 2011, the United States has allocated more than \$1.4 billion to support Tunisia's transition, which overall has focused on internal and external security, promoting democracy and good governance, and supporting economic growth.¹⁶ In 2015, the United States designated Tunisia as a major non-NATO ally.

In 2021, however, President Kais Saied, who had been popularly elected two years earlier, launched a dramatic overhaul of the country's governing system, reversing many of its democratic advances. He has employed a populist, anti-Western narrative in part to justify his actions, challenging relations with the United States—and Europe. This situation has led to reduced U.S. economic and security assistance despite dire economic conditions, and postponement or cancellation of major programs

such as a \$500 million Millennium Challenge Corporation compact to improve transportation and access to water and irrigation.¹⁷ Saied's comparative indifference regarding Tunisia's relationship to the United States has opened the country to greater activity from China and Russia, which lack America's scruples about Saied's governance.

Libya

The United States has had the rockiest relationship with Libya relative to the other three countries discussed in this paper. In the 1980s—during Muammar Qadhafi's forty-two-year rule—the United States carried out air operations against Libya and sanctioned the regime in response to the 1988 bombing of Pan Am Flight 103 over Scotland, which was linked to Libyan actors. By the early 2000s, in an effort to reopen his suffering but oil-rich economy, Qadhafi agreed to turn over weapons of mass destruction materiel and to pay reparations to the families of Pan Am victims. This long process, which occurred in the context of the U.S. invasion of Iraq, led to the formal restoration of U.S.-Libya relations in 2006.¹⁸

When the Libyan uprisings began in February 2011, U.S. president Barack Obama decided to intervene with NATO and coalition partners in response to the regime's crackdown, authorized by UN Security Council Resolution 1973. After six months of mostly stagnation, coalition forces helped the fragmented opposition seize the capital, Tripoli, in August 2011. Two months later, Qadhafi was killed and a transitional government took over.

Since then, the United States has supported a transitional governing process but suffered major setbacks, notably the 2012 murder in Benghazi of Ambassador Christopher Stevens and three other Americans. Yet internal Libyan disputes have been at the heart of a now thirteen-year transition, including two civil wars primarily between western and eastern actors. U.S. personnel vacated the Tripoli embassy during fighting

in 2014 and now operate out of Tunis, putting them at a distinct disadvantage when it comes to engaging the population. But the United States remains diplomatically involved through a special envoy, Richard Norland, to support the transition process.

Politically, the United States has supported a UN-led process to end the transition through national elections, which have been postponed indefinitely from a planned vote in December 2021. Over the last several years, America has been providing Libya an average of \$69.4 million per year in economic support funds to the UN-recognized government based in the west, mainly earmarked for democracy and governance support for aiding civil society organizations, local governments, and national institutions such as the High National Election Commission. Nevertheless, the deep divides that continue to characterize Libyan leadership and the heavy influence of militias and Khalifa Haftar’s eastern-based Libyan National Army suggest it will be difficult for Washington—or any actor—to help stabilize Libya and develop a strong, effective partnership with the country in the near future.¹⁹

The Russian and Chinese Tool Kits

China and Russia use differing strategies for asserting their influence. Broadly speaking, Russia takes a “pragmatic” approach to foreign policy on the African continent—supporting whomever it believes will help advance its goals—and primarily has a security or strategic focus.²⁰ In contrast, China seeks principally to advance its economic interests, typically by developing local infrastructure on terms conducive to Chinese firms, and thus create leverage in the relationship. (For trade with China and Russia for each North African country, see figures 2 and 3.)

In addition to extending military support to various armed actors through the state-sponsored Wagner Group (now rebranded Africa Corps), the Kremlin has long used disinformation as a tool in the Middle East

and Africa. Over the years, the Russian state-owned media outlets RT Arabic and Sputnik Arabic emerged as major sources of perceived legitimate regional news in the Middle East.²¹ More recently, starting in about 2019, the Wagner Group itself has helped spread disinformation across the African continent. Russia also deploys more traditional diplomatic and economic modes of influence, such as an initiative for a free trade area with North Africa, to be integrated into the Eurasian Economic Union—a bloc comprising Russia, Armenia, Belarus, Kazakhstan, and Kyrgyzstan.²²

Chinese economic activity includes high levels of exports, primarily of cheap consumer goods, and “near-shoring”—or establishing manufacturing plants for such goods in the Maghreb to take advantage of its proximity to Europe. China has also sought to export services in the form of construction projects—often major infrastructure initiatives—but this approach has faced some backlash due to Beijing’s tendency to send its own workers rather than create opportunities for local employment. Large pockets of Chinese workers have on occasion led to friction with locals.²³ These efforts are often connected to Beijing’s Belt and Road Initiative (BRI), which has sought among other means to link China with the rest of the globe through large transportation projects. China has also notoriously offered loans to heavily indebted countries in exchange for access to key natural resources, but this pattern has not taken hold in the Maghreb.

China engages all four Maghreb countries—as it does others in Africa and the Middle East—through a combination of bilateral relations and multilateral forums,²⁰ with each country belonging to China’s primary multilateral engagement mechanisms in the region: the China–Arab States Cooperation Forum (CASCF) and the Forum on China–Africa Cooperation (FOCAC). Engagement through these multilateral forums is seen as advantageous to China, in part because it allows China to portray itself as convening a wide range of countries while also diluting the Maghreb countries’ individual bargaining power.²⁴ For the Maghreb countries, membership in such forums offers the appearance of active engagement

Figure 2. Trade with China

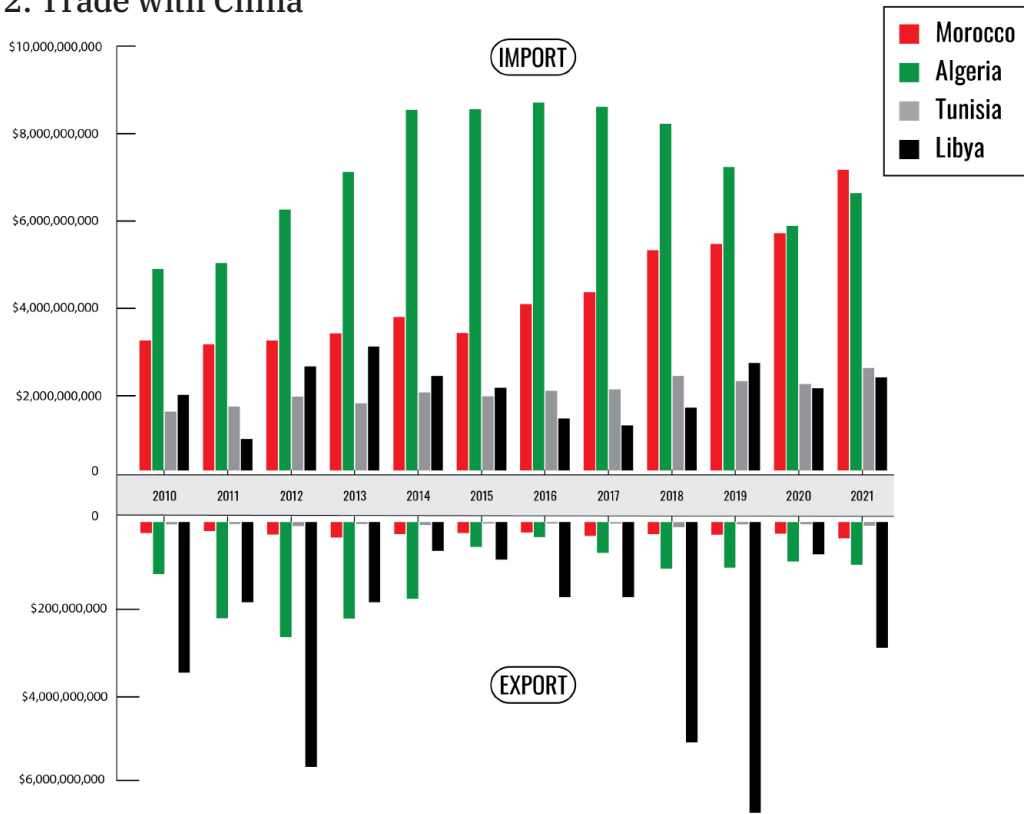
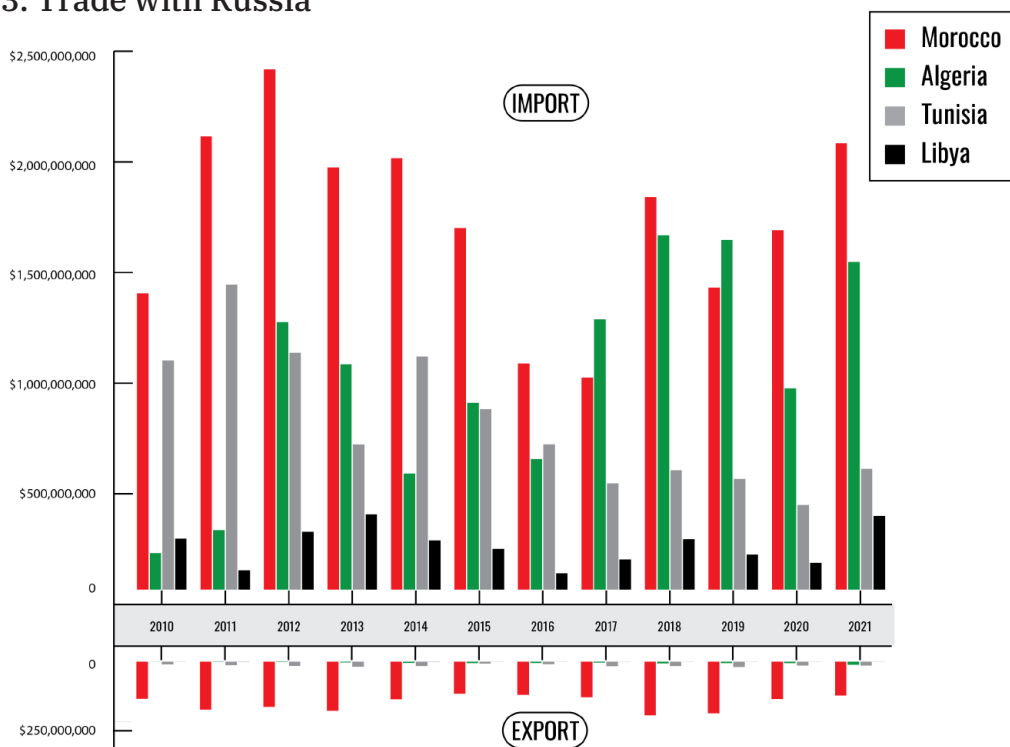


Figure 3. Trade with Russia



Sources: World Integrated Trade Solution (World Bank), see, e.g., <https://wits.worldbank.org/CountryProfile/en/Country/MAR/Year/2020/TradeFlow/EXPIMP>; “U.S. Trade with Algeria: Overall Trends,” Office of Technology Evaluation, U.S. Census Bureau, 2021, <https://bit.ly/4bVo5QN>; and “Libya,” Observatory of Economic Complexity, <https://oec.world/en/profile/country/lby?yearSelector1=2011&-yearlyTradeFlowSelector=flow0>.

with a global power. The Algeria-Morocco rivalry has proven the greatest obstacle to Maghreb integration, forcing the other countries to relinquish their own potential benefits from collective bargaining with China.

Culturally, the Maghreb hosts centers such as Confucius Institutes, which are modeled on Western entities such as the Goethe Institute and Institut Français, where citizens of other countries can study language and other aspects of Chinese culture,²⁵ and Russia has supported outposts of the Orthodox Church. Although Russian and Chinese tourism in North Africa has grown, especially in Tunisia and Morocco, barriers such as language and ease of travel continue to limit such visits. Educational exchanges, too, are very limited compared with the number of North Africans studying in Europe or the United States.²⁶

Morocco

Morocco's chief foreign policy concern is preserving its claim on Western Sahara, which affects its relations bilaterally with Algeria and in multilateral forums such as the UN Security Council. In addition, since approximately the start of King Mohammed VI's reign in 1999, Morocco has sought more actively to capitalize on its geographical position—namely, its access to the Atlantic Ocean and Mediterranean Sea and its proximity to Europe—by casting itself as a critical node in global supply chains. These efforts have been complemented by Rabat's successful diplomacy in sub-Saharan Africa—part of a general attempt to diversify the kingdom's political and economic partnerships as conditions in Europe have shifted (e.g., since the 2007–8 global financial crisis). Additionally, Morocco has tried to attract a diversity of investors and foreign partners by touting its endowment of renewable resources and its political stability compared to its North African neighbors.²⁷

As a result, Morocco's relations with China have expanded in recent years, particularly in the

economic sector. Relations between Morocco and Russia are generally cooler given Russia's traditional ties with Algeria.

Cordial Relations with Russia, but at a Remove

Russia-Morocco relations date back to approximately 1778, when an exchange of messages between Sultan Mohammed III bin Abdullah and Catherine the Great (Catherine II) resulted in a peace treaty.²⁸ In 1897, imperial Russia established a consulate in Tangier in part to gain support from North African countries during its confrontation with the Ottoman Empire.²⁹

During the Cold War, Russia attempted to maintain good relations with Morocco, with Rabat serving as an important trading partner for the Soviets, who sought access to phosphates, used largely to produce fertilizers, and generally to gain a deeper foothold in North Africa.³⁰ Morocco never fully embraced socialism, however, limiting the intimacy of bilateral relations. Meanwhile, the Kremlin also armed the Polisario movement in Western Sahara (see below), drawing pushback from Rabat and creating tensions.³¹

In the Putin era, Russia has made a concerted effort to improve relations with Morocco. King Mohammed VI first visited Moscow in October 2002, three years after assuming power, and went again in March 2016.³² During the first visit, Putin and the king signed a Declaration on Strategic Partnership aimed at expanding bilateral ties, with the language indicating it was “based on the principles of sovereign equality, a peaceful settlement of disputes, respect for human rights and freedoms, and a dialogue between civilizations and cultures.”³³

Putin's world profile had grown distinctly darker between the first and second visits, punctuated by Russia's 2014 invasion of Crimea, and Morocco had maintained its Western-oriented foreign policy under Mohammed VI. The 2016 conclave, nevertheless, yielded several cooperation agreements, including documents related to counterterrorism, tourism,

nuclear energy,³⁴ and transportation.³⁵ The king reportedly reiterated his determination to strengthen security ties between the two countries.³⁶ Subsequent senior official visits followed, along with visits from prominent members of the business community, and both countries reported continued intent to deepen ties on growing bilateral trade.³⁷ Upon Putin's 2024 reelection as president, the king reiterated his commitment to strengthening bilateral ties.³⁸

Yet largely out of respect for the United States, and perhaps also due to Russia's close ties with Morocco's rival Algeria (see below), Rabat has kept its distance from Moscow, particularly in international diplomacy. Morocco was absent from the first several UN General Assembly votes condemning Russia's invasion of Ukraine but has since switched to voting against Russia (see figure 4 for UN votes by all North African states).³⁹ Morocco claims nevertheless to uphold a neutral position on the conflict,⁴⁰ possibly because of its increased dependence on Russian energy, having reportedly emerged as one of Africa's main importers of Russia's diesel fuel, along with increased imports of other oil and gas products, as Russia loses shares in the European market amid sanctions.⁴¹ But Morocco has reportedly sent tanks to Ukraine,⁴² and especially given its close ties to Europe and the United States, would be unlikely to take a future position in support of Russia.⁴³ The growing presence of the Russia-sponsored Wagner Group/rebranded Africa Corps in the Sahel, including reportedly in southern Algeria⁴⁴—combined with Russia's substantial arms sales to Algeria—has also heightened Rabat's suspicions about Russian aims.

Economically, Morocco is Russia's third largest African trading partner behind Egypt and Algeria, although Moroccan exports to Russia—mostly citrus and other food products—constituted less than 1 percent of Russian imports in 2021.⁴⁵ In the same year, Russia accounted for 3.4 percent of Moroccan imports, which totaled about 42 percent of Morocco's total GDP.⁴⁶ Moroccan imports from Russia include coal, chemicals, diesel fuel, and fertilizers.⁴⁷ The coal plays a significant role in producing electricity for Morocco, which is entirely energy-import dependent, and increased Moroccan imports of

Russian diesel after the Ukraine invasion exemplify Rabat's increased energy dependence on Moscow, whose investment in the North African country remains minimal.⁴⁸

In terms of public diplomacy, Russia saw its first North African vaccine diplomacy success during the Covid-19 pandemic in Morocco. In November 2020, Artyom Tsinamdzgvrishvili, the head of Russia's trade mission there, announced that his country would ship Morocco enough doses to vaccinate 20 percent of its population.⁴⁹ Thus far, however, this success does not appear to have translated into a deeper connection between the two countries. By comparison, the United States donated 2.7 million doses of vaccines produced by Pfizer and Johnson & Johnson through the COVAX program, enough to vaccinate about 7 percent of the Moroccan population.⁵⁰

Growing Morocco-China Economic Links and Modest Defense Ties...

Morocco's economic ties with China have deepened in recent decades, particularly given Beijing's simultaneous shift to a more market- and export-oriented economy followed by its Belt and Road Initiative. In 2017, Morocco became the first Maghreb country to launch a strategic partnership with China. Trade between the two countries stood at approximately \$4.8 billion in 2020;⁵¹ China has sought to manufacture goods in Morocco to take advantage of its free trade agreements with both Europe and the United States.⁵² Yet the large trade imbalance—imports from China are roughly 10 percent of Morocco's total, while exports to China represent only 0.9% of all Morocco's exports—worries some Rabat officials.⁵³ Moreover, Morocco has deliberately sought to maintain a diversity of trading partners and avoid compromising its traditional close relations with Europe—particularly France—and the United States.

The two countries signed a BRI implementation agreement in January 2022, which among other objectives sought to promote Chinese financing for Moroccan development projects and encourage Chinese firms to invest in Morocco.⁵⁴ Yet Chinese

Figure 4. North African Votes on Ukraine at UN General Assembly

○ Absent ● No ● Yes ● Abstain

Year	Resolution	Description	Voting record			
			Morocco	Algeria	Tunisia	Libya
2023 (Mar)	ES-11/6	Principles of the Charter of the UN underlying a comprehensive, just, and lasting peace in Ukraine (calling for peace in Ukraine)	●	●	●	●
2022 (Nov)	ES-11/5	Furtherance of remedy and reparation for aggression in Ukraine (imposing a war reparation mechanism on Russia)	○	●	●	●
2022 (Oct)	ES-11/4	Territorial integrity of Ukraine: defending the principles of the Charter of the UN (declaring Russia's referenda in occupied Ukrainian territories invalid and demanding that Russia "immediately, completely, and unconditionally withdraw" from Ukraine)	●	●	●	●
2022 (Apr)	ES-11/3	Suspension of the rights of membership of the Russian Federation in the Human Rights Council	○	●	●	●
2022 (Feb)	ES-11/2	Humanitarian consequences of the aggression against Ukraine (demanding Russian withdrawal, expressing concerns over human rights violations and violence against civilians)	○	●	●	●
2022 (Feb)	ES-11/1	Aggression against Ukraine (demanding Russian withdrawal from Ukraine and reversing recognition of two separatist entities inside Ukraine)	○	●	●	●

Source: UN Digital Library, see. e.g., "Principles of the Charter of the United Nations Underlying a Comprehensive, Just and Lasting Peace in Ukraine," resolution adopted by the General Assembly, <https://digitallibrary.un.org/record/4004933?ln=en&v=pdf>.

investment (both public and private) had already been expanding in a range of sectors including but not limited to fisheries, telecommunications, and infrastructure.⁵⁵ Nonetheless, as with trade, Chinese investment in Morocco has not expanded at the same pace as in other African countries,⁵⁶ and it still has not reached the levels of traditional European, Gulf, and American investors.⁵⁷ Additionally, an increase in Chinese foreign direct investment (FDI) remains challenged by Morocco's preference for local production, which conflicts with China's emphasis on manufacturing and production by Chinese companies.⁵⁸

Unlike in neighboring Algeria, China has not been the main implementer of high-profile construction projects, which in Morocco include impressive endeavors such as the Tanger Med Port Complex,⁵⁹ which has become one of the largest and most active ports both along the Mediterranean Sea and in Africa.⁶⁰ Nonetheless, China's investment has been notable, including as a partner on the Mohammed VI Tangier Tech City project.⁶¹ This \$10 billion "smart city" was announced in March 2017 but delayed after the Chinese Haite Group pulled out—later replaced by the China Communications Construction Company and its subsidiary, the China Road and Bridge Corporation, which signed a memorandum of understanding with Morocco's BMCE Bank.⁶² The project, now projected for completion by 2027, is set to become the largest Chinese investment project in North Africa.⁶³ It is also meant to host approximately two hundred Chinese tech companies and "strengthen Morocco's linkages within the Euro-Mediterranean region."⁶⁴

The Chinese telecommunications giant Huawei also plans to establish regional and logistical centers in the Tangier Tech City, having already achieved a significant place in Morocco's market.⁶⁵ Yet security concerns may limit its presence at the port complex,⁶⁶ and several indicators suggest Morocco will not use Huawei as its 5G provider.⁶⁷ Still, this decision—and the reassurance it would provide to the United States and Europe about preventing Chinese access to sensitive data—is not a sure thing, and the West may have to put forward

a clear, affordable alternative to dissuade Morocco from ultimately choosing Huawei.

Chinese investors have also been involved in the past two decades of Moroccan growth in key strategic sectors such as automobile manufacturing.⁶⁸ Major European manufacturers including Renault and Stellantis now produce inside the kingdom, with Chinese firms among their many international suppliers.⁶⁹ Additionally, Morocco's cobalt and phosphate reserves could allow the country to become a key player in the production of electric vehicle batteries and EVs themselves.⁷⁰ Here, too, Chinese firms have been quick to establish their role. For example:

- In 2017, the Chinese company BYD signed a deal to open an EV production plant in Kenitra—although this effort has faced some delays.⁷¹
- In June 2023, the Chinese firm Gotion signed a similar MOU for an EV battery factory, which would represent the second largest FDI project in the country if realized.⁷²

China would likely face headwinds in pursuing major defense contracts with Morocco, given the kingdom's preference for importing arms from the United States, Europe, and elsewhere. Rabat has purchased frigates from Europe,⁷³ unmanned aerial vehicles from Turkey,⁷⁴ and some of the most in-demand U.S. platforms, like F-16s,⁷⁵ Apache helicopters,⁷⁶ and the High Mobility Artillery Rocket System (HIMARS).⁷⁷ In 2022, Morocco signed on to a ten-year road map for defense cooperation with the United States.⁷⁸ Morocco also has a growing relationship with Israel: the Moroccan air force currently operates three Heron UAVs, and Israeli soldiers participated in the African Lion exercise for the first time in 2023.⁷⁹ Moroccan forces regularly train with their U.S. and Western counterparts, and Moroccan defense officials have clearly prioritized relations with the United States and the West.

Yet that does not mean relations have been exclusive. In recent years, Morocco has increased its defense budget from an adjusted \$3.61 billion in 2008 to

\$5.66 billion in 2022.⁸⁰ With increased spending has come a willingness to diversify its defense relations in select sectors, including developing modest defense ties with China. In 2016, for example, Morocco purchased the Tianlong-50 air defense system from Beijing.⁸¹ Another Chinese air defense system operated by Morocco, according to the International Institute for Strategic Studies, is the FD-2000, a long-range platform similar to Russia's S-300.⁸² In 2022, open source imagery indicated Morocco was building a new air defense base outside Rabat that would incorporate Chinese systems, potentially alongside others from the United States, Europe, and Israel.⁸³

...While Cultural Ties Face Challenges

China has pursued certain openings in the people-to-people domain, such as in vaccine diplomacy and cultural exchange, but these do not yet constitute a threat to the historic Moroccan closeness with the United States and Europe, particularly France. Chinese cultural exchanges with Morocco are nonetheless significant: Morocco hosts three Confucius Institutes—in Casablanca, Rabat, and Tetouan—and other cultural centers in Casablanca, Tangier, Tetouan, and Agadir.⁸⁴ Chinese-language instruction is becoming integrated into training courses in the tourism industry and other professional development programs such as those run by the BMCE Bank Foundation for Education and Environment. The language is even being introduced in some primary schools.⁸⁵ Morocco's Ministry of Culture has helped organize celebrations of the Chinese New Year in multiple cities for the past several years.⁸⁶

Chinese tourism to Morocco received a major push with the lifting of visa restrictions in 2016 and the establishment of direct flights in 2019,⁸⁷ reaching approximately 150,000 visitors per year by 2019.⁸⁸ Anecdotal reports suggest the numbers have not returned to their pre-Covid levels.⁸⁹ Regardless,

Chinese tourism is still minor compared to the numbers from the Moroccan diaspora, France, and Spain.⁹⁰

Like Russia, China took advantage of the severity of the pandemic to expand its health diplomacy in Morocco, providing 65 million doses of the Chinese-produced vaccine Sinopharm and four large air shipments of medical supplies and personal protective equipment. (Immediately following the outbreak, Rabat sent medical supplies to Beijing.⁹¹) Chinese pharmaceutical companies also partnered with Morocco to carry out clinical tests for the vaccine.

As elsewhere, a growing Chinese economic presence does not necessarily translate into closer people-to-people relations. Despite some indications of an expanding Chinese presence in Moroccan society,⁹² including reports of pockets of Chinese residency in places like Casablanca's Derb Omar business district,⁹³ Beijing's investment has not necessarily been accompanied by the societal integration of Chinese workers. The numbers of Chinese immigrants has actually fallen in recent years, likely as a result of the pandemic and the demand for workers elsewhere in Africa.⁹⁴

Unsurprisingly given their histories, cultural affinity between Moroccans and their Western counterparts remains stronger than that between Moroccans and Chinese. This is evident in the wide prevalence of French in Morocco (as in Algeria and Tunisia) and the large numbers (approximately 1.3 million) of Moroccan expats living in France paired with roughly 50,000 French citizens living in Morocco—"a number that doubles when accounting for dual citizens."⁹⁵ Other indications come from public opinion data: for instance, China's treatment of Uyghur Muslims has reportedly weakened perceptions of China inside Morocco.⁹⁶ Numbers of Chinese students in Morocco have not increased with particular rapidity, and the growth of Moroccan students interested in studying in China remains limited.⁹⁷

Algeria

Despite its professed commitment to nonalignment, Algeria during the Cold War was closer to the Soviet Union and its proxies and satellites than to the West. In the 1990s, amid the Algerian civil war and the Russian transition away from communism, relations temporarily dimmed, but they picked up again under Algerian president Abdelaziz Bouteflika, who came to power in 2000, and Russia's newly elected President Putin.⁹⁸ More recently, defense ties have been challenged by Russia's invasion of Ukraine and Algeria's growing desire to assert itself globally following several years under an ailing head of state,⁹⁹ the internal disruptions of the pandemic, and popular uprisings in 2019. Algeria's pursuit of improved regional and global stature is also evident in its relations with China, where President Abdelmadjid Tebboune paid an official visit in July 2023.¹⁰⁰ Yet China-Algeria relations have also faced hurdles, including on the economic front.

Algeria-Russia Defense Relations Strong but Not Unshakable

The Algerian military's significant influence in national politics makes the country's historic defense orientation toward Russia all the more significant. The connection can be traced to 1963, a year after independence, when Algerian forces suffered a serious setback during a border clash with the Moroccan military, prompting officials to seek military aid from Moscow. The Soviet Union extended a line of military credit for the equivalent of \$100 million, thus starting a long arms sales relationship.¹⁰¹ Today, Algeria is a top-five purchaser of Russian arms globally, with Russian weaponry constituting approximately 76 percent of Algeria's arms imports since 2002.¹⁰² Algeria has purchased advanced Russian platforms, including the S-300 air defense system, Project 636 diesel-electric submarines, Iskander-E short-range ballistic missiles, and various fighter jets.¹⁰³ Given the importance of arms exports to Russia's economy and the strategic positioning of Algeria in the

Mediterranean, Moscow has been keen to keep this relationship close: in 2006, Russia wrote off billions of dollars in Algerian debt in exchange for Algerian purchases of Russian arms;¹⁰⁴ and in 2018, Russia granted Algeria access to its global navigation satellite system known as GLONASS, a status previously given only to India.¹⁰⁵

Yet over the decades, Algeria has often attempted to assert its defense independence. It rejected the Soviet Union's requests for basing rights at naval facilities in the 1960s and attempted to reassert its status as a nonaligned country following the 1973 Arab-Israel war, in part because it viewed Moscow's support for the Arabs as insufficient.¹⁰⁶ In the 1980s, Algerian officials grew wary of their reliance on Moscow for weaponry and attempted to diversify arms suppliers, in particular by purchasing C-130s from the United States.¹⁰⁷ Algerian leader Chadli Bendjedid visited Washington in 1985, prompting the United States to grant Algeria access to general military equipment—though subsequent purchases were unsubstantial.¹⁰⁸ Algeria condemned the 9/11 attacks and pledged to enhance counterterrorism efforts with the United States, leading to an increase in U.S. military support and several cabinet-level visits to Algiers.¹⁰⁹ When Mark Esper visited in 2020, he became the first U.S. defense secretary to visit the country since 2006. The trip reflected an inclination in Washington to “maybe push the door open a little bit” in courting Algeria out of Russia's defense orbit.¹¹⁰

Notably, Russian and Algerian leaders have not finalized an estimated \$12–17 billion weapons purchase by the latter reportedly under discussion since 2022¹¹¹—likely due to Russia's unanticipated needs in Ukraine. In August 2023, the Russian defense minister and Algerian army chief also met to discuss “improving the combat capabilities of the Algerian armed forces,” but they did not announce a deal.¹¹² Thereafter, in April 2024, the deputy defense ministers met in Algeria to discuss the countries' “strategic partnership.”¹¹³

For Algiers, Russia's invasion of Ukraine and the subsequent effects on its ability to export arms will continue to shake up the global arms market and

may have renewed Algeria's desire for more autonomy in its defense partnerships, but Algeria's deep and historic ties to the Russian military remain a serious hurdle.¹¹⁴ Algeria, like many traditional customers of Russian weaponry, will struggle in the coming years to not only purchase new Russian weaponry but even to maintain its existing supply of Russian arms. From now on, Algiers will have to weigh whether its historically close defense relationship with Moscow still makes sense.

Algiers as a Political Free Agent

In the diplomatic arena too, Algiers must balance its desire to retain strong ties with Moscow (as its main weapons supplier) with its foreign policy principles of sovereignty and its relations with the West. Moscow offered more support to Algiers than did other countries during its decade of internal turmoil, as well as during the 2019 popular protests that pushed President Abdelaziz Bouteflika from power—giving Algiers reason to try to keep Russia happy¹¹⁵—but the Ukraine invasion altered the equation. Algeria abstained on five of six votes in the UN General Assembly condemning Russian aggression in Ukraine, but in April 2022 it voted—along with BRICS members China, India, and Brazil¹¹⁶—to remove Russia from the UN Human Rights Council.¹¹⁷ A similar dynamic may have pertained in July 2023 when then Prime Minister Aymen Benabderrahmane, rather than President Tebboune, represented Algeria at the second Russia-Africa Summit in St. Petersburg. Benabderrahmane also attended the U.S.-Africa Leaders Summit in December 2022, suggesting that Algeria is seeking to send balanced signals about its great power relations.¹¹⁸

In November 2022, Algeria officially announced that it was applying to join the BRICS political-economic grouping, and Russian foreign minister Sergei Lavrov subsequently said the North African state “tops the list” of applicants.¹¹⁹ The candidacy was generally considered a reflection of Algeria's longstanding foreign policy strategy of pursuing multilateralism without becoming tied down by formal alliances, as

well as a means of accelerating Algeria's own economic development—e.g., by increasing financial resources and technological transfers from countries such as India.¹²⁰ Finally, however, Algeria was not among the five countries—including the higher-GDP Middle East contestants Egypt, Iran, and the United Arab Emirates—invited to join in August 2023.¹²¹

Economically, Algeria is one of Russia's main trading partners in Africa,¹²² but trade relations are highly imbalanced, as they are in the Russia-Morocco context. In 2017, Russia exported an estimated \$1.2 billion worth of goods and services to Algeria (led by navigation equipment, soybean oil, and broadcast services); that same year, Algeria only exported approximately \$6.3 million in goods to Russia (largely dried and fresh fruit).¹²³ In 2017, Algeria's GDP totaled \$170.1 billion, 22.6 percent of which consisted of exports.¹²⁴ This reflects Algeria's general lack of diversification when it comes to economic production and exports. Another barrier to trade between the two countries is their shared role as major exporters in natural gas.¹²⁵ Algeria also imports significant amounts of wheat from Russia.¹²⁶ After Russia pulled out of the Black Sea Grain Initiative in July 2023, which allowed exports of various grains from Odessa ports, Egypt criticized the move, but Algeria did not. This reflects the balancing act Algiers is still seeking to strike.

Cultural Relations with Russia Mostly Strong

Culturally, Russia has managed to make inroads in Algeria. According to some reports, Russian disinformation campaigns have attempted to portray the Hirak protest movement as fueled by radical Islamists.¹²⁷ One analyst has documented several cases of Russian media outlets, think tank analysts, and officials warning about Islamists' role in the uprisings that began in 2019, and likening them to Egypt's 2011 uprisings.¹²⁸

Analyses of Russian media suggest the Kremlin views Algeria as a significant country to pursue influence. The state media outlet RT (formerly Russia

Today) opened a bureau in 2024, thereafter launching its fifth RT Arabic talk show series, also available in Russian.¹²⁹ Reportedly, RT has received more welcoming treatment compared with other international news outlets, many of which have either been barred from operating or had journalists expelled.¹³⁰

Polling data also suggests that decades of broad government-level Algeria-Russia cooperation, as well as Russia’s relative success in the information and media sphere, has influenced public perceptions.¹³¹ For example, in 2022 a large majority (66%) of Algerians expressed favorable attitudes toward Russia—likely “the consequence of decades of close government cooperation and cultural exchange.”¹³² Notably, in 2022 the proportion of Algerians wanting to strengthen economic ties with the country (55%) had increased by 20 points from 2019. (For public perceptions of the United States, Russia, and China, see figure 5.)

In late 2020 and early 2021, Russia and Algeria also reached an agreement over a delivery of 500,000 doses of the Sputnik V vaccine free of charge and for Algeria to start producing the vaccine. Algeria was reportedly the first African country to register the

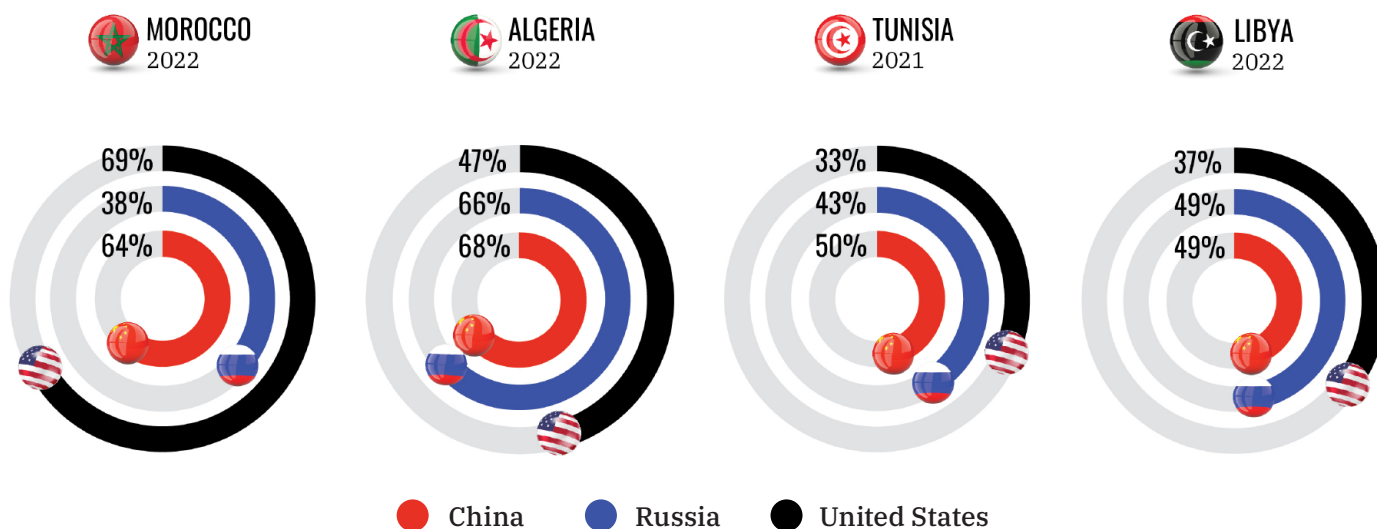
vaccine and one of a select number on the continent to receive a delivery given its “preferred” status in Moscow’s eyes.¹³³ The first shipment of Sputnik V was quickly followed by deliveries of the British-produced AstraZeneca vaccine and the U.S.-produced Johnson & Johnson vaccine.¹³⁴

A Generally Upward Trend for Algeria-China Ties

China and Algeria have grown closer politically in recent years. Historically, Beijing was an early supporter of the National Liberation Front (FLN) during the Algerian war of independence from 1954 to 1962. In the 1970s, Algeria supported China’s candidacy to the United Nations and eventually promoted the resolution that in 1972 granted to the People’s Republic Taiwan’s seat at the UN.

The state visit of President Tebboune to Beijing in July 2023, following a similar trip to Moscow the previous month, is a recent sign of this deepened political partnership. The visit highlighted the evolution of Algeria-China ties, based on a shared vision of the world that emphasizes sovereignty and

Figure 5. China, Russia, and the United States: Favorability Ratings Across North Africa



Source: Arab Barometer Wave VII reports, <https://www.arabbarometer.org/surveys/arab-barometer-wave-vii/>.

noninterference. The main pillar of this renewed relationship is Algeria's continued candidacy to join BRICS, which Algeria continues to frame optimistically despite its lack of success thus far.¹³⁵ In a further sign of adherence to this "new multilateralism" pursued by Beijing, Algiers pledged to join the BRICS-associated New Development Bank as a shareholder. On January 1, 2024, Algeria entered the UN Security Council as nonpermanent member for a two-year tenure, during which it is expected to coordinate closely with China.

The two countries are also longtime economic partners. Algeria has shown a preference for Chinese investments over the past decade, notably awarding Beijing emblematic projects such as the construction of the Great Mosque of Algiers and the new Algiers International Airport.¹³⁶ Today, as with all its economic partners, Algeria expects China to carry out productive investments in partnership with Algerian actors. Algeria hosts one of the largest populations of Chinese workers in Africa,¹³⁷ and has 850 Chinese active companies in the country.¹³⁸

Indeed, since 2012 China has overtaken France as Algeria's top supplier, with more than \$6 billion of imports that year, and China is among the biggest clients of Algeria globally.¹³⁹ Algerian authorities have encouraged a Chinese presence and ratified a Belt and Road Initiative MOU in 2019. Algiers also adhered to the Asian Infrastructure Investment Bank as early as 2018, hence acquiring a seat on the bank's board, with voting rights proportional to capital invested.¹⁴⁰

China's investments have focused on four key sectors: petrochemical extraction, public works and infrastructure, telecommunications, and car production. (Activity in the defense industry marks a fifth.) Building on this strong presence, contracts involving Chinese companies now emphasize key infrastructure projects with strategic value, including:

- The completion in 2023 of the 1,216-kilometer East-West Highway, largely built by CITIC Construction at a total cost of more than \$17 billion.

- An agreement for the construction of a deepwater port in El Hamdania–Cherchell, signed in January 2016 as part of the BRI and backed by a \$3.3 billion Chinese loan.¹⁴¹ If this project materializes, it will end the de facto Algerian policy of not contracting loans.
- A contract signed in February 2022 with the Chinese petroleum and chemical company Sinopec for the construction of a liquid gas storage facility in Skikda, worth \$180 million.
- A project with Sinopec underway since May 2022 on the production of fuel additives in Arzew, worth \$430 million.

Despite this seemingly flourishing economic relationship, Algiers-Beijing cooperation faces many constraints. As a generally closed economy with an unfriendly investment climate,¹⁴² Algeria has placed restrictions on imports that have forced some Chinese companies to leave the country. As elsewhere, the significant number of Chinese workers has prompted accusations in Algerian policy circles that China is evading the practice of local hiring in a country where unemployment reaches 14 percent. Besides these difficulties, Chinese efforts in Algeria face stiff competition from abroad, especially from Turkish companies in the key sector of public works.¹⁴³ The reputation of some Chinese companies for scandal and corruption has encouraged such competition.¹⁴⁴ In fact, President Tebboune's summer 2023 visit to Beijing resulted in the rebranding of old projects, reflecting some of the limitations to growing the partnership.

Like many countries that rely on arms imports primarily from a single source, Algeria has at various points attempted to diversify its acquisitions and modernize its defense industrial base. Russia's invasion of Ukraine—and the subsequent turbulence facing longstanding customers of Russian weaponry, including Algeria—will likely accelerate Algeria's efforts to fortify its military's status.¹⁴⁵

In recent years, Algeria has shortened military



The world's tallest minaret belongs to the Djamaa el Djazair mosque in Algiers, which opened in 2019 and was built by China State Construction Engineering. REUTERS

scription requirements from eighteen to nine months,¹⁴⁶ increased defense spending,¹⁴⁷ and engaged in coproduction arrangements with various European firms.¹⁴⁸ As it seeks to diversify its arms imports, Algeria could turn increasingly to China, one of the world's fastest-growing arms exporters. As a fellow legacy purchaser of Russian weaponry, Beijing can make a unique marketing pitch to arms importers struggling to source supplies from Moscow. In recent years, Algeria has already begun to look toward China, such as in the following instances:

- In 2012, Algeria began purchasing several Chinese corvettes for its navy.¹⁴⁹
- In 2017, Beijing launched Algeria's first telecommunications satellite, which could support military operations.¹⁵⁰
- In 2018, the Algerian military took delivery of several Chinese armed UAVs.¹⁵¹
- In 2022, reports emerged that Algeria was in negotiations with China to acquire short-range ballistic missiles.¹⁵²

Some reports have also indicated China has hosted Algerian military officers for training.¹⁵³ To date, Algeria-China defense relations have been modest in comparison to Algeria's historic ties to Russia, yet there is clearly room for growth. During Tebboune's visit to Beijing, the two countries pledged to deepen their security ties.¹⁵⁴ In November 2023, the head of Algeria's armed forces visited Beijing to further discuss military cooperation, likely including an exploration of arms sales.¹⁵⁵ In the future, one can expect Algeria's defense ties with China to gradually expand, perhaps at Russia's expense.



The CH-4 UAV is one of the Chinese-made drone types to arrive in Algeria in 2018.

Russia, China, and the Conflict over Western Sahara

The U.S.-Russia geostrategic rivalry has been playing out quietly in the dispute over Western Sahara—a situation from which both Algeria and Morocco have sought advantage. Technically, Moscow has always professed neutrality on Western Sahara. Yet in practice, Russia has stuck close to the Algerian position, which generally backs the Polisario Front representing the claim to Sahrawi independence.¹⁵⁶ In October 2023, Moscow abstained from a UN Security Council vote on the draft resolution put forth by the United States to renew the MINURSO mandate, calling it “unscrupulous” and claiming it failed to incorporate “a single one” of Russia’s comments.¹⁵⁷

In the years since the Trump administration recognized Morocco’s sovereignty over Western Sahara, Russia has responded favorably to the Polisario’s increased overtures for support. Morocco’s anger over such moves may have prompted its postponement in October 2021 of the sixth Arab-Russian Cooperation Forum in Marrakesh, even as the gathering eventually took place in December 2023—conveniently timed with the rise in anti-American sentiment over the Hamas-Israel war.¹⁵⁸

In tapping the Western Sahara issue, Algeria appeals to Russia’s interest in expanding bilateral relations as well as its competition with the United States. When in June 2023 Algerian president Tebboune led a large ministerial delegation on a long-awaited visit to Moscow, some read this as a response to the joint U.S.-Morocco military exercises taking place the same week. For the first time, the area for the exercises had been expanded to include al-Mahbes in the Moroccan-held part of Western Sahara—a move potentially seen as provocative by Algiers.

Thus, Moscow has followed similar patterns of behavior in Morocco and Algeria as elsewhere in the Middle East: attempting to play a more assertive role as a mediator, taking the anti-U.S. side despite

professing neutrality, and inserting itself into vacuums left by a U.S. absence.¹⁵⁹ With respect to Western Sahara, Morocco has sometimes gestured toward Russia when it feels challenged, such as in 2013 when Rabat canceled the African Lion exercise in response to the U.S. introduction of a human rights monitoring component into the MINURSO mandate, which Morocco has consistently opposed.¹⁶⁰ Some have argued that the incident helped solidify Morocco’s intent to find more allies in the Security Council, although U.S. recognition of Moroccan sovereignty over Western Sahara likely dampened this inclination.¹⁶¹

China has staked out a more neutral position than Russia on the Western Sahara issue. Despite strong ties to Algiers, Beijing has generally embraced principles of sovereignty and territorial integrity that some have read as tacit recognition of Morocco’s claim to the territory.¹⁶² To date, an equilibrium appears to have emerged wherein Morocco respects Beijing’s “one China” policy in exchange for the latter’s cooperation on the UN Security Council over Western Sahara—a sort of mutual acceptance of red lines.¹⁶³

Meanwhile, building on their history and ideological affinity, Algiers and Beijing have developed a positive political relationship based on mutual support in multilateral forums. On Western Sahara and Taiwan, key sovereignty issues for both capitals, each is careful not to take any step that would harm the other. In China’s case, a real balancing act here involves ensuring its relations with Morocco do not deteriorate in the process.

Given the intractability of the Western Sahara conflict, Morocco and Algeria are likely to continue using U.S.-Russia competition to try to advance their respective positions. At a moment when the basis for American recognition of Morocco’s position—Rabat’s normalization of relations with Jerusalem—is being challenged by Israel’s engagement in Gaza, this situation has only become more complicated. Although China has not yet signaled an intent to do so, a more neutral position could conceivably position it to try to exert influence as a mediator in the future.¹⁶⁴

Tunisia

Tunisia's sharp authoritarian turn since July 2021—driven in large part by popular frustration with the failures of the country's political elites—has had a noticeable, if confusing, effect on its foreign policy outlook.¹⁶⁵ Under previous governments, the country had maintained largely friendly relations with the West and comparatively more distant relations with China and Russia. Yet over the past few years, President Kais Saied's fierce anti-Western populist rhetoric has become a key part of Tunisia's outward identity, as manifested in actions such as the rejection of EU assistance and the blocking of a European parliamentary delegation in summer 2023.¹⁶⁶ In Washington, once an active supporter of Tunisian democratization, it has aroused fears of enhanced influence from Moscow and Beijing—even as these fears appear not yet to have played out.

Political, Economic, and Cultural Ties with Russia—Modest but Not Insignificant

Russia and Tunisia have had full diplomatic ties since July 1956,¹⁶⁷ but the relationship has never been especially deep. Since February 2022, Tunisia has voted in favor of four of the six UN General Assembly resolutions condemning Russia's aggression in Ukraine, although it claims to be neutral on the conflict. Some have interpreted its two abstentions as the result of increasing pressure from Algiers, on which Tunis relies for some financial support.¹⁶⁸ Certain analysts also highlight a lack of sympathy for Ukraine among the Tunisian public, where the West is perceived as hypocritical in its rush to aid Ukraine while ignoring the suffering of Palestinians and conflicts in Africa and elsewhere.¹⁶⁹

Recently, diplomatic exchanges have been moderate but noteworthy. In July 2023, Tunisia was among thirty-two of forty-nine countries to send a delegation headed by a foreign minister, rather than a head of state, to the Russia-Africa Summit in St. Petersburg.¹⁷⁰

In late September 2023, Foreign Minister Nabil Ammar met with his Russian counterpart, Sergei Lavrov, in Moscow, where the two reportedly discussed increasing volumes of Russian wheat to Tunisia—a key vulnerability for the country.¹⁷¹ Then, in December 2023, Lavrov stopped in Tunis as part of a North African tour following the Arab-Russian Cooperation Forum in Marrakesh.¹⁷² And in early 2024, reports emerged that the national electoral commission, known by its French acronym ISIE, had entered into a memorandum of understanding with Russia following a study tour to Moscow by ISIE president Farouk Bouasker.¹⁷³

Tourism has remained a key link between the two countries. Between 2012 and 2016, overall tourism in Tunisia suffered a sharp decline due to a series of terrorist attacks, but a tenfold increase in Russian visitors between 2015 and 2016 helped make up for the drop from Europe.¹⁷⁴ This was partly a result of diverted tourism from Egypt and Turkey, two top destinations, attributable among other factors to a temporary diplomatic rift between Ankara and Moscow.

In 2021, Russia furnished 3 percent of tourists in Tunisia—considered a significant market by authorities.¹⁷⁵ Hotel owners and other stakeholders in Tunisia's tourism industry expected another increase in 2022, but the war in Ukraine brought about a decline.¹⁷⁶ In an achievement, Russia managed to deliver one million doses of its Sputnik V Covid vaccine to Tunisia, reportedly driven in part by Tunisia's desire to encourage the return of Russian tourists.¹⁷⁷ The Russian airline Aeroflot announced that it would restart flights to Tunisia in May 2023,¹⁷⁸ but is rumored to have faced financial difficulties in doing so.¹⁷⁹

“Cultural centers” are generally known to be fronts for Russian intelligence gathering, and for many years one has maintained a presence in Tunisia. In the 1950s, moreover, the Russian community built an Orthodox Church in Tunis, and its enduring presence suggests a means of access or intelligence gathering, with the church having become integral to the state in the Putin era.¹⁸⁰ Also in the area of cultural

exchange, recently the Russian state propaganda outlet Sputnik reported that Tunis held its first exhibition promoting Russian universities, “Education in Russia for Tunisia 2023.”¹⁸¹ The Tunisian-Russian Friendship Association has reportedly launched an initiative to facilitate funding for Tunisian students wishing to study in Russia.¹⁸²

Stasis in Other Areas, but Tunisia Susceptible

Elsewhere, Russia’s activity in Tunisia has not tended to expand significantly, likely as a result of Tunisia’s inability to capitalize on any Russian interest. Trade between the two countries is modest, totaling roughly \$566 million in 2021,¹⁸³ although such numbers should be seen in the context of its much smaller GDP (\$46.69 billion) relative to Algeria (\$163.47 billion) and Morocco (\$141.82).¹⁸⁴ Like Algeria, Tunisia imports significant amounts of grain from Russia—in 2021, wheat and barley imports were estimated at approximately \$38 million and \$105 million, respectively, although these figures were upset by the February 2022 invasion of Ukraine.¹⁸⁵ Tunisian exports to Russia mostly consist of textiles, leather, and fluorides.¹⁸⁶

However limited the current relationship, Tunisia remains susceptible to Russian inroads—likely more than Morocco, another North African state with scant ties to Moscow. Tunisia’s reliance on Russian and Ukrainian grain is one such area, with Moscow having shown it will weaponize food in the context of the Ukraine war.¹⁸⁷ Morocco historically has imported its grain from both Ukraine and Russia.¹⁸⁸

Relatedly, Tunisia’s democratic backsliding under President Kais Saied has prompted U.S. policymakers to enact reductions in bilateral assistance.¹⁸⁹ To the extent that this affects the security partnership—some on Capitol Hill are calling for a trimming of military assistance¹⁹⁰—Tunisian officials could decide that Russia is a more reliable partner during its time of heightened economic uncertainty. So far, this has not played out, with Saied choosing to insist on Tunisian “sovereignty” above a more direct turn

toward the West’s rivals. Yet given the overall dynamic, Western officials should also closely monitor Russian inroads into the Tunisia security services as an attempt to expand influence across the region. Finally, the possibility must be considered that Saied will call on Russian, not American, assistance if the terrorist threat reemerges in Tunisia.

Political-Economic Relations with China Hampered by Tunisian Weakness

Tunisia recognized the People’s Republic in 1964, becoming the last Maghreb country to do so. The first president of Tunisia as an independent nation, Habib Bourguiba, favored a pro-Western orientation, but relations with China deepened somewhat under his successor, Zine al-Abidine Ben Ali, who unambiguously supported the one China policy. Ben Ali traveled to Beijing in 1991 and Chinese leader Jiang Zemin traveled to Tunisia in 2002. During the second visit, they signed several bilateral agreements on a range of economic and other cooperative issues.¹⁹¹

Relations dipped slightly following the sudden popular overthrow of Ben Ali in 2011, with Beijing uncertain of how to react.¹⁹² Under the first permanent postrevolutionary government of Beji Caid Essebsi, elected in 2014, both sides seriously explored ways to deepen Chinese investment, but the domestic preoccupation with rebuilding the Tunisian state prevented these explorations from fully bearing fruit.¹⁹³ This general trend has accelerated since the transition of power to Saied from Essebsi who died in office in 2019 at age ninety-two, with Chinese outreach to Tunisia appearing stronger than the other way around. For example, Chinese foreign minister Wang Yi’s visit to the country in January 2024 as part of his annual Africa tour reflected a recognition of Tunisia’s importance in Beijing’s eyes but was not presented as holding particular strategic value by the Tunisian press.¹⁹⁴ Moreover, despite his fierce anti-Western positions, Saied’s rhetoric and actions have so far contained surprisingly few allusions to deepening ties with China.¹⁹⁵ This is in contrast to neighboring Algeria, which has actively

pursued stronger relations with both Russia and China as part of its larger foreign policy strategy.

Economically, Tunisia signed on to the BRI with a 2018 MOU, but no implementation agreement has occurred yet. Trade between China and Tunisia has expanded over the past decades, but, as with other Maghreb countries, Tunisia has a substantial trade deficit with China.¹⁹⁶ Moreover, although China has reached the position of third largest supplier of consumer goods to Tunisia, Tunisian trade is still relatively heavily weighted toward European partners.¹⁹⁷ This offers a contrast to other African countries, including the Maghreb as well as elsewhere in francophone Africa, where Chinese trade has largely begun to replace French and other European trade.¹⁹⁸ As with Morocco, Tunisia's free trade agreement with Europe draws Chinese manufacturing to the country because it enables export of Chinese-made goods with lower tariffs.¹⁹⁹

Nonetheless, Tunisia's location at the center of the North African Mediterranean coast, with its proximity to European and African markets and vital shipping routes, makes it attractive for Chinese

investment. Such investment has faced barriers, however, most notably the lack of a legal framework for public-private partnerships.²⁰⁰ In 2021, the two countries signed a \$15 million deal on infrastructure packages, but most have yet to be started.²⁰¹

Thus, again in contrast to neighboring Algeria, Chinese construction contracts have been limited in Tunisia, mainly consisting of a few high-visibility projects such as a \$23 million diplomatic academy



In December 2020, Tunisian president Kais Saied inaugurated a university hospital in Sfax, built with Chinese financial assistance.



inaugurated in April 2022.²⁰² China also constructed a university hospital in Sfax, completed in 2020.²⁰³

Similarly, China's interest in developing Tunisia's ports has been clear, but its actual involvement has not been.²⁰⁴ Tunisia's plans to expand the strategic Zarzis port into a logistical hub with a free trade zone opening onto Libya, for example, have been consistently delayed, as has the planned port project at Enfidha.²⁰⁵ Tunisia's indebtedness makes a contract with China on such projects unlikely any time soon;²⁰⁶ at the time of writing, it is unclear how the government will meet its \$2.6 billion foreign liability repayments scheduled for 2024.²⁰⁷ Moreover, China has struggled to translate its interest in developing Tunisia's ports, including Bizerte, into tangible contracts due to Tunisian government ineptitude.²⁰⁸ China appears to have more promising prospects of developing deepwater ports in neighboring Algeria, as discussed earlier.

Tunisia has permitted some Chinese involvement in developing the country's connectivity and other infrastructure. For instance, Huawei Marine Networks completed the "Hannibal" cable linking Tunisia to Italy in 2009, despite concern among Europeans that this could lead to Chinese intelligence gathering and naval and military cooperation in the Mediterranean.²⁰⁹ Tunisia was also the site of the BeiDou Navigation Satellite System's first facility abroad, launched in 2018 by the China Satellite Navigation Office and the Arab Information and Communication Technology Organization.²¹⁰ In June 2023, Tunisia's minister of communication technologies, Nizar Ben Neji, led a delegation to China's port city of Tianjin, where the two countries entered into an MOU on communication and information technology.²¹¹ Yet even as Huawei provides 4G connectivity for approximately 15 percent of the local smartphone market,²¹² its 5G ambitions have faced pushback from the United States and competition from Europe.²¹³

In sum, while China theoretically should have a favorable position in Tunisia on investments, infrastructure, and loans, Saïed's emphasis on sovereignty—including his insistence on hiring of

local workers amid high unemployment—as well as Tunisia's general internal struggles could challenge China's traditional development model.

A Slow Attempt to Build Cultural Ties

During the 1980s, Tunisia became the first Arab country to offer Chinese-language courses, and in 2009 it became the first to open a Confucius Classroom, in Sfax.²¹⁴ A Confucius Institute was opened in 2010 at the University of Carthage outside Tunis, and the same university now partners with four different Chinese universities and has hosted cohorts of Chinese students studying Arabic.²¹⁵ By 2020, Chinese training centers and universities had hosted more than a thousand Tunisians for courses and workshops in sectors including diplomatic relations, economic management, and health and agriculture.²¹⁶ In late 2023, the Chinese Association for International Understanding and the Tunisian National Heritage Institute held a conference on culture and civilization in Tunis.²¹⁷

Tunisia has followed Morocco's path in trying to attract Chinese tourism by eliminating visa requirements.²¹⁸ Chinese visits subsequently increased by as much as 10 percent year-on-year between 2017 and 2019, according to some reports.²¹⁹ As in Morocco, however, a pandemic-era drop in tourist numbers still has not been remediated; moreover, even at its annual peak of 30,000 Chinese tourists, this represented an iota of the roughly 9.4 million total yearly visitors.²²⁰

The Chinese media presence in the country has notably expanded, including through social media outreach by the Chinese embassy in Tunis.²²¹ Thus far, however, its effects on public opinion are unclear.²²² Polling data indicates that Tunisians hold largely favorable perceptions of China—more than 60 percent say they would favor stronger economic relations²²³—but this does not translate into a preference for Beijing as a political and economic partner.²²⁴ At the same time, the narrowing of domestic press freedoms in Tunisia could make the country more prone to Chinese influence.

Libya

Lacking support from a permanent government since 2011, Libyan foreign policy has consisted of responses by various actors to international interests. At its height in 2015 and again in 2019, the proxy conflict between Libya’s eastern and western governments included competition

between regional powers—broadly, with the UAE and Egypt supporting one side and Turkey and Qatar backing the other—but other international actors, including Italy, France, and Russia, have also been involved.²²⁵ Overall, Russia has played a much more overt role in such activity than China, but both countries have sought to establish a presence that will produce benefits regardless of Libya’s future political character.



Russian Intervention in Libyan Politics and Military...

In April 2008, Vladimir Putin became the first Russian leader in twenty-three years to visit Libya, helping establish a cordial relationship with Muammar Qadhafi.²²⁶ Putin's visit brought about the cancellation of \$4.5 billion in Soviet-era debt in exchange for Qadhafi's commitment to multibillion-dollar contracts with Russian defense companies, energy investments, and a plan to build a high-speed coastal rail from Qadhafi's hometown, Sirte—often the site of his vanity projects and diplomatic ceremonies—to Benghazi.²²⁷ Yet by the time of the 2011 uprisings, only fifteen kilometers had been built, and the project was suspended by the fighting.

The Libyan dictator's violent response to the 2011 uprisings and subsequent NATO-led intervention ultimately facilitated a destructive Russian role in the country, along with new fault lines with the United States. Russia's bitterness about the NATO action can be traced to its abstention on (rather than rejection of) UN Security Council Resolution 1973, which authorized a "civilian protection" mission in response to Qadhafi's vicious crackdown, primarily then around Benghazi. At the time, while ostensibly serving as Dmitry Medvedev's prime minister, Putin did not block Russia from abstaining on the resolution. Yet Russia later claimed it had been reassured the resolution would not lead to regime change, and the apparent betrayal of this promise has stoked Russian anti-NATO grievance ever since. Putin called the resolution "defective and flawed" and compared it to "medieval calls for crusades."²²⁸ Reportedly, Putin has repeatedly watched the gruesome footage of Qadhafi's eventual death in October 2011 as a reminder of perceived Western duplicity and the consequences of allowing organized domestic opposition.²²⁹

Since Putin's resumption of the presidency, Russia has been an obstinate actor on the Security Council, often opposing international efforts to unify the opposing sides, providing alternative forums for international gatherings, and limiting the mandate and leadership of the UN Support Mission in Libya

(UNSMIL). As of this writing, UNSMIL is on its eighth leader in twelve years, and huge staff and leadership turnover weakens its overall mission. Russia's obstructionism is largely responsible for two lengthy gaps in UNSMIL leadership and even shortened the length of the mission's mandate, requiring the Security Council to reauthorize it every three months instead of every year.²³⁰

Moreover, in the run-up to the ultimately postponed December 2021 elections, Russia was suspected of supporting the return of Saif al-Islam al Qadhafi, one of the former leader's sons, and at least two Russians were arrested for conducting influence operations.²³¹ Russia pays lip service to supporting elections and voted for the latest UNSCR 2702 (October 2023), which extended UNSMIL's mandate by a year, calling for reconciliation and urging "free, fair, transparent and inclusive national presidential and parliamentary elections as soon as possible across the country."²³² Yet Russia remains an unreliable actor and has regularly agreed to resolutions calling for the departure of foreign forces since the October 2020 ceasefire, despite the obvious presence of Wagner, as detailed below.²³³

On the military front, Russian activity in Libya's fractured military landscape can be dated to at least 2017, when Moscow backed Haftar following his visit to Moscow. Despite his anti-Qadhafi stance in the 1980s and his ultimate residency in Virginia for more than twenty years, Haftar is at heart a Russian-trained officer, like most of his Qadhafi-era colleagues. Moscow, for its part, has denied being active in Libya, using its Wagner Group forces for deniability. After Haftar was rebuffed in his April 2019 assault on Tripoli, Wagner forces began deploying to the frontlines and offered additional tactical advantages to his Libyan National Army (LNA), including precision sniper activity, deployment of Pantsir anti-aircraft systems, and Chinese-origin drones.²³⁴ A Defense Department report corroborated by independent research showed that Wagner was receiving UAE support at the time, but this evident relationship—denied by Abu Dhabi—ended after being exposed.²³⁵ A UN panel of experts initially established to monitor arms

embargo and other violations estimated the presence of up to two thousand Wagner personnel actively supporting Haftar, as of 2021.²³⁶

To counter Haftar's advances, the UN-recognized Government of National Accord signed a set of controversial maritime and defense agreements with Turkey, which formed the legal basis for Ankara to deploy its own forces to Tripoli and ultimately defeat Haftar's LNA forces and Wagner's systems with superior Bayraktar-2 drones.²³⁷ In its retreat, Wagner left dozens of improvised explosive devices, including some attached to children's toys.²³⁸

After the October 2020 ceasefire, the parties agreed to the departure of foreign forces on either side, including mercenaries from Chad, Sudan, and Syria. (Many Syrian were fighting under Wagner's direction.) In May and July 2021, the U.S. Africa Command released imagery demonstrating the continued supply of Wagner platforms and equipment, including transfers of fighter aircraft from Syria. Other imagery showed cargo aircraft delivered from Syria to Libya. The UN panel of experts, moreover, "identified at least 505 flights by specific aircraft registration number, equating to a maximum cargo delivery of 23,328 tonnes during 2020..."²³⁹ As of late 2023, many African and Syrian mercenaries had departed even as Turkish personnel remained, ostensibly justified by their defense pact with the Tripoli-based government. Haftar, in turn, argues that he needs Wagner to defend against a potential attack from Turkish forces.²⁴⁰

After the August 2023 death of Wagner chief Yevgeny Prigozhin, the Russian official defense establishment worked expeditiously to keep Haftar in its orbit. Deputy Defense Minister Yunus-bek Yevkurov, charged with running Moscow's Africa operations, visited Haftar the day after Prigozhin's death and has met Haftar in Libya multiple times since. More tellingly, a day after meeting the U.S. envoy to Libya and the head of U.S. Africa Command in Libya, Haftar flew to Moscow to meet Putin—an unmistakable diplomatic swipe at Washington. For U.S. and NATO interests, the potentially worst outcome would be Russia's establishment of a naval base in eastern Libya, to go with its al-Jufrah Air

Base, marking an unacceptable Russian intrusion into the Mediterranean.

As it has done on Western Sahara and other Middle East conflicts, however, Russia has tried to uphold the appearance of balance, maintaining a relationship with the Tripoli-based government even as it has poured most support into Haftar's forces, thus affording it a veneer of credibility as a mediator. For example, Prime Minister Fayez al-Sarraj visited Moscow twice, in 2017 and 2020; during the latter visit, he accepted Russian diplomatic support to end the 2019–20 battle for Tripoli. Subsequently, in April 2021, Putin met current prime minister Abdulhamid Dbeibeh shortly after he assumed the role. And in November 2023, Mohammed Takala, the newly appointed head of the Tripoli-based parliament, known as the High State Council, stressed the need for improving Libya-Russia relations during his first visit to Moscow.²⁴¹

Given Russia's track record of meddling, the United States and its partners can expect Moscow to remain a destructive force in internal Libyan politics. This is because a unified, legitimate government threatens the presence of Russia-backed forces, whatever risks the alternative scenario may pose, ranging from emboldened militias to rampant smuggling and overall chaos. U.S. and other actors, in the end, should not be fooled by Russian pretensions of neutrality in Libya. They must in turn pressure Haftar to limit his reliance on Russia and, if he fails to respond, be prepared to impose meaningful consequences against the military figure.

...But Without Major Economic Benefit for Either Side

Modest economic ties do not fundamentally drive Russia's interest in Libya, in contrast to the Wagner Group's gold and mineral exploitation elsewhere in Africa. Nevertheless, expansion of trade and investment—especially in the energy sector—is always a possibility, although volumes will remain limited relative to neighboring Egypt and Algeria. When it does engage in trade and investment, Russia will need to show political balance due to Tripoli's

overall economic influence through the Central Bank and National Oil Corporation, institutions through which any deal requiring state funding must go.

Russia clearly demonstrated its support for the east when, over 2016–19, it began creating a black market exchange rate by printing and shipping around 10 billion dinars (then around US\$7 billion) until a large shipment was stopped in Malta.²⁴² The Russian initiative temporarily eased a liquidity crunch but only created more long-term debt in the eastern banking system, which would eventually be supplied by the Tripoli-based Central Bank as part of a Haftar-engineered deal in exchange for ending the Wagner-supported 2022 blockade of oil fields, which over four months cut production by as much as half.²⁴³

On the energy front, Russia suspended operations in Libya for a decade, from 2011 until 2021. Gazprom, in a joint venture with Germany's Wintershall Dea, shares a 49 percent stake in fields in the Sirte basin that produce around 50,000 barrels per day.²⁴⁴ And in May 2023, the Russian exploration and development company Tatneft discovered a small field in Ghadames Basin.²⁴⁵ Overall, though, Moscow appears much less poised to expand its influence in Libya's energy sector relative to the political and security domains.

China-Libya Ties Guided by Pragmatism

Compared with Russia's strategic presence in Libya, China has taken a much more limited, pragmatic approach, principally governed by economic interests, mainly oil imports. In late 2019, just before the outbreak of the Covid-19 pandemic, China imported 2 percent of its crude oil from Libya.²⁴⁶ That amount flatlined during the pandemic but could increase if record Chinese demand persists and Libyan production endures, which is contingent on the absence of domestic conflicts or stoppages and boycotts at production sites. Libya exports almost exclusively fuel to China. For its part, China is second to Italy as an exporter of goods to Libya, a significant portion of them consumer goods.²⁴⁷

To date, Libya remains a comparatively limited

source of investment in the Belt and Road Initiative, in large part due to Libyan governance instability and China's desire to avoid entangling itself in the Libyan conflict. China also remains scarred by having had to evacuate 36,000 workers from nearly fifty infrastructure projects during the 2011 Libyan revolution, a massive effort that required diplomatic resources, naval assets, and chartered planes.²⁴⁸ Those workers were employed at projects valued at approximately \$18.8 billion, including a more than \$4 billion railroad project.²⁴⁹ The experience has made China slow to engage Libya on BRI projects, although Libyan leaders from both east and west have occasionally sought Chinese reinvestment—principally in the railroad project. In August 2023, Tripoli-based Presidential Council deputy Musa al-Koni talked with Chinese officials on the sidelines of the BRICS summit in South Africa.²⁵⁰

China has demonstrated its neutrality diplomatically by abstaining on UN Security Council Resolution 1973 (2011), which authorized the intervention against Qadhafi, as well as during the country's subsequent periods of civil war. The China-Libya relationship has vacillated historically and was marred for Beijing by Qadhafi's initial recognition of Taiwan. But that insult evidently faded, relations improved, and economic ties deepened once Libya started opening its economy. Today, China generally regards Maghreb and African states as holding increasing strategic importance, with intentional engagement in Libya reflected in its humanitarian response to the massive September 2023 flooding in Darnah. According to the Chinese Foreign Ministry spokesman: "The people of China and Libya share a profound and long-standing friendship."²⁵¹ China's chargé d'affaires at the embassy in Tripoli also provided the Libyan Red Crescent with \$200,000 for flood relief. The chargé completed a five-and-a-half-year tenure in Libya in 2023, with China's non-appointment of an ambassador likely showing its ambivalence toward the bilateral relationship.²⁵²

Although Libya is not a Chinese military client, Haftar's forces did use Wing Loong II drones and missiles against Tripoli before Turkey intervened on the western government's behalf in early 2020. These drones were reportedly operated out of the

UAE and launched from Libyan air bases, as confirmed by the UN panel of experts.²⁵³ China's lack of end-user agreements allows these advanced systems to be operated with impunity in third countries.

Conclusions

The Russian and Chinese presence in North Africa varies substantially by country and in form. Russia's military involvement, for example, ranges from fairly deeply embedded in Libya to almost completely absent in Morocco. Similarly, both Russian and Chinese economic activity—particularly trade—is high in some countries, such as Algeria and Morocco, but relatively low elsewhere, such as in Tunisia. This variation reflects the starkly different strategies of the two aspiring superpowers and the diversity and lack of integration among the Maghreb countries.

Clearly, however, both Russia and China have a desire to expand their influence in North Africa. Some of the most formidable obstacles come not from the Eastern powers' weaknesses, but from the inability of North African countries to capitalize on this interest—again to varying degrees, reflecting their own politics, ideologies, governance capacity, or conflicts. Tunisia's failure thus far to realize several infrastructure projects in partnership with China, as compared to Chinese participation in Moroccan and Algerian economic activity, reflects not so much different preferences among these North African countries as their different capacities and levels of economic stability. On the other hand, Russia's success in establishing a foothold in Libya is partly due to the inability of North Africa's leaders to unify around national interests and objectives. The same is true regarding China's growing media influence in Tunisia—as compared to, say, Algeria—where Beijing seems to have recognized an opportunity to successfully deploy certain tools and tactics.

Yet to the extent that Russia and China will seek

opportunities to engage in the Maghreb, the four countries of the region will seek to benefit from them. This is true, for example, as great power competition plays out in the UN Security Council vis-à-vis the Western Sahara and Libya conflicts. It is also plain in defense spending and in the economic sphere—with the possible exception of Tunisia, where a great emphasis by the current president on sovereignty could explain the relative lack of courtship of Beijing. Finally, in North Africa as elsewhere on the continent, Russia and China are perceived differently from Western powers. Available post-October 7 public opinion polls suggest a sharp decline in favorable attitudes toward the United States and President Joe Biden specifically, and a moderate rise in favorable views about China and Russia along with their leaders, Xi Jinping and Vladimir Putin. An Arab Barometer poll of Tunisians fielded both before and after October 7 supports this trend, finding that “before October 7, on average 40 percent of Tunisians had a favorable view of the U.S. and 29 percent favored Biden's foreign policies.” After October 7, however, favorable views of the United States fell to 10 percent and to just 6 percent for President Biden.²⁵⁴ Although the polling results did not reflect significant movement of views on China and Russia, their starting points are strong, with China earning 71 percent favorability and Xi netting 54 percent; the numbers are 60 percent for Russia and 54 percent for Putin. This data suggests that the Eastern powers enjoy a more favorable public perception because they lack the same colonial legacy, do not impose the same conditions on human rights and democracy, and “talk about equal partnerships with African states.”²⁵⁵

A trans-regional poll conducted in December 2023/January 2024 by the Arab Center for Research and Policy Studies suggests similar trends, with more country-specific opinions on Hamas, U.S. policy, and relations with Israel. It found that across the region, 94 percent of respondents viewed the U.S. position on the Gaza war as “very bad” or “bad,” compared with 42 percent for Russia and 38 percent for China; 76 percent reported that their attitudes toward the United States had become more negative. The generally negative view was pretty steady across

the states surveyed, although slight variations appeared in “very bad” versus “bad” responses. Perhaps notably, respondents from Morocco, which normalized relations with Israel in 2020, held more negative views than those from Algeria, which has no official ties to Israel. Similarly, the poll suggested that whereas 67 percent of Moroccans opposed recognition of Israel when surveyed in 2022, the figure had risen to 78 percent in 2024.²⁵⁶ This survey indicates trends similar to the Arab Barometer poll, but does not address China or Russia. The question is whether and to what extent these views, assuming they are accurate, could change with the end of the war and progress toward a Palestinian state.

Such trends reinforce the overall picture presented in this paper: each North African country will pursue its own interests before joining any geopolitical “camp.” With two major wars now raging—one started by Russia and with heavy repercussions in Europe, one with profound implications across the Middle East, and both with significant American involvement—the complexity of navigating the geopolitical environment for a divided country like Libya only deepens. North African governments and publics may be influenced by messaging, policies, and larger strategies, but ultimately they will seek to profit from today’s fractured global landscape however they can—such as by inviting Chinese investment in infrastructure, a sector from which American investors are largely absent—while mitigating the detrimental effects of increased global competition.

Implications and Recommendations for U.S. Policy

North Africa’s lack of integration and unity makes it particularly vulnerable to increased geopolitical competition with Russia and China. As this paper has outlined, North Africa is a case of long-term,

slow-moving engagement by U.S. adversaries, which use both country-specific and region-wide approaches to expand their influence. The United States should therefore invest now in expanding its influence across a range of sectors so that it can compete in the region. Showing a commitment to partnerships in North Africa will also better position the United States to respond if and when the region experiences a new crisis linked to governance, stability, terrorism, or a climate disaster. In the absence of a crisis, stronger relationships with the four countries discussed here will help accomplish U.S. foreign policy objectives in other areas, especially in the strategically vital East Mediterranean, where Washington needs to stay focused on impeding Russia’s influence. Libya remains especially vulnerable to Russian aspirations to East Mediterranean access on NATO’s southern flank and Russia’s overall power projection into Africa. Similarly, enhancement of relations with Algeria—a major source of energy resources particularly for Europe, a military heavyweight, and an increasingly vocal actor in multilateral forums—warrants stronger U.S. efforts given Algeria’s potential future influence on the world diplomatic stage and through energy exports.

While Russia and China appear to adapt somewhat to each North African country’s specific context, they also tend to use the same playbook regardless of where they are operating. To counter Russian and Chinese influence in each country and in the region as a whole, Washington should promote regional integration, in addition to strengthening ties on a bilateral level. Policies promoting integration are absent from Russian and Chinese activities and can help fortify the countries against malign influence by Moscow and Beijing by decreasing the need for arms buildups, fostering solutions to key cross-border challenges such as climate change, and providing new pathways for economic development.

Specifically, the United States should focus on several actions in order to counter growing Russian and Chinese influence.

Recommendations for the Broader Region

Policy recommendations applicable to the broader North Africa region are as follows:

Encourage cooperation to address natural disasters and climate change. In the second half of 2023 alone, Algeria, Morocco, and Libya suffered extensive damage from wildfires, earthquakes, and flooding. As such incidents become more frequent, North African states can benefit from exchanging information and best practices and preparing coordination mechanisms for future incidents that cross national borders. Washington can encourage cooperation in the face of accelerating climate change by facilitating regional dialogues among civil society and other relevant actors that deal with challenges facing North Africa. The United States should also provide expertise on emergency rescue and crisis management as a gateway to the discussions.

Focus on economic and livelihood issues. Democracy promotion remains an important part of U.S. foreign policy, and America should remain true to its values. That said, when it comes to North Africa, a more effective approach would be to prioritize the needs of the population—particularly through protection against economic instability and climate shocks—and build closer relationships based on those interests. (Indeed, after a decade of progress toward democracy, including the drafting and approval of a constitution and the peaceful transition of power after successive elections, Tunisians elected an autocrat who remains popular.) This is where Russia and China tend to make headway: by focusing on the immediate and practical needs of their interlocutors. For instance, when Russian foreign minister Sergei Lavrov travels to Africa, he typically arrives with a business entourage and the goal of signing business agreements that matter to the region's leaders. The United States should therefore review practical programs that it

can provide, especially in the commercial, business, energy, and trade sectors, and seek to extend public-private initiatives that would assist North African populations where they need the most help.

Coordinate with the private sector to offer commercial alternatives to China and Russia. China, in particular, has the ability to direct state-associated companies to make deals in resource-stricken countries, often at a more competitive price point than Western alternatives and without being subject to strict anti-corruption laws. When Western companies have successfully outbid their Chinese competitors, they have often done so after coordination between Western countries and China's potential customers. For instance, Jordanian telecommunications companies recently selected European firms over Chinese firms for their 5G networks after years of concerted U.S. and Western discussions with Amman. A similar opportunity exists in North Africa, where Morocco and Tunisia have yet to select their own 5G provider and have considered Huawei. The United States and its partners must keep conveying the risks of deeper commercial ties with China and Russia (e.g., to cybersecurity, which violates principles of sovereignty) while simultaneously coordinating with Western private-sector partners on the development of alternatives.

Convey to regional countries the risks of security ties with China. A close security partnership with China poses risks to the sovereignty of host nations, an issue of particular sensitivity in North Africa. Even seemingly commercial projects, such as those involving critical infrastructure, can open the door to Chinese interference that can affect relationships with other states. The increasing risk of Chinese surveillance of sensitive U.S. platforms at home and abroad means Washington will likely have little appetite for selling sensitive weaponry to countries with security ties to China. For U.S. partners in the region—particularly Morocco and Tunisia—America should consult closely on establishing clear baseline parameters for relations with China that safeguard security cooperation with Washington.

Emphasize the poor track record of Russia and China as security partners. Russia has a weak history of countering terrorism, from Syria to the North Caucasus to its own capital, as the March 22, 2024, terrorist attack in Moscow tragically demonstrated. Although Russian officials have acknowledged the importance of countering terrorism emanating from North Africa, they often do so as a pretext to establish influence. Extremist activity is a major concern for North African governments given the region’s history, and terrorism threats will likely worsen as Libyan authorities struggle to contain militias and Sahel governments reel from instability. Beijing, for its part, has done little to engage in counterterrorism-related issues beyond those that directly touch its own interests abroad. In North Africa, China has yet to present itself as a security partner, and if it did so, it could not offer a convincing track record. Such weakness offers Washington an opportunity to highlight its advantages over Beijing and Moscow in areas of transparency, technology, knowledge, and experience and to increase security cooperation where appropriate.

Work more closely with European and other allies where interests align. Europe understandably remains focused on the war in Ukraine and on its eastern sector generally. Still, its southern neighborhood also deserves close attention for reasons including a rolling migration crisis, which has fueled the rise of far-right political movements across Europe. As in the past, the Kremlin will likely use migration as a cudgel against Europe, underscoring why the United States should increase its attention to North Africa now, including by supporting European initiatives (e.g., on migration management and renewable energy) that lay the groundwork for future cooperation.

Project an alternative narrative. Russia and China have been sending a clear message in North Africa, as they have done elsewhere in the “global south”: that they will support development and security with “no strings attached”—i.e., no expectation of steps toward democracy—although such support is

undoubtedly associated with other “strings” such as debt traps. Rather than simply play defense and counter disinformation, Western governments must unapologetically project their own narrative on media channels and elsewhere, whether about Russia’s invasion of Ukraine, China’s mistreatment of its Muslim Uyghur population, or any other issue. Ultimately, the West needs to make clear that the alternative to the world order advanced by Moscow and Beijing will allow North African countries to develop economically while also retaining their sovereignty.

Although both Russia and China tend to invest in cultural activities with little apparent tangible value, including parades and movie nights, such activities appear to be gradually helping shape a positive image of these countries among North Africans. In addition to focusing on local and regional media, the United States can enhance its influence by devoting more resources to cultural exchanges—e.g., study tours, English-language courses and clubs, scholarships—that help reorient participants’ worldviews toward a liberal model. Such programs have historically contributed to building strong ties that anchor North African countries to the United States—e.g., through the high number of U.S.-Morocco Fulbright and Peace Corps exchanges. Although the effectiveness of such “soft power” tools is notoriously difficult to measure, their absence ensures failure and creates a vacuum for American adversaries to fill.

Country-Specific Recommendations

Recommendations applicable to individual North African states are as follows:

Shore up Morocco as the strategic anchor for U.S. engagement in North Africa. Morocco is the most stable American partner in North Africa, and Washington must reinforce the countries’ strong security partnership and sustain existing economic

and security assistance with the goal of blunting Chinese and Russian advances. The United States should also monitor areas such as Morocco's energy imports from Russia and reiterate its support for Morocco not only in security but also in fields that will enhance the perception of the West in the eyes of the Moroccan public, including through technical assistance to manage water scarcity. The United States can expand programs through the Development Finance Corporation and show its commitment to resolving the Western Sahara conflict by reiterating its support for UN special envoy Staffan de Mistura and urging "concerned parties," including Algeria, to resume roundtable talks.

Deepen defense and business relations with Algeria. The United States should continue to warn Algiers of the perils of a close security relationship with China and be prepared to address Algeria's concerns if Beijing's actions jeopardize the relationship. Washington likewise needs a closer defense dialogue with Algiers on U.S. end-user agreements and their perceived risks to Algerian sovereignty. An enhanced dialogue should include reiterating how increased security cooperation with Russia and China also compromises Algeria's sovereignty, particularly through purchases of communications and surveillance technology. Concomitantly, Washington should keep pursuing business and investment relations in Algeria.

Reinforce up Tunisia against long-term vulnerabilities such as climate change. The United States has rightly decided to continue investing in its military partnership with Tunisia despite concerns about President Kais Saied's authoritarian measures, including some apparent

attempts to drag the military into politics. Washington should additionally support Tunisia against Russian and Chinese encroachment by helping the country mitigate the effects of climate change and boosting private-sector development of advanced technological industries. It could begin doing so by reinvigorating the Tunisian American Enterprise Fund and exploring new projects through the Development Finance Corporation, thereby benefiting the Tunisian population regardless of Saied's authoritarian rule.

Pressure Haftar to stop cooperating with Russia.

Russia's military presence in Libya remains especially concerning for reasons connected to stability, security, and control of natural resources. With Wagner Group/rebranded Africa Corps forces having seized the al-Jufrah Air Base in 2019, Moscow's acquisition of a naval base or even docking rights would pose an acute threat to NATO. Reopening the U.S. embassy in Tripoli will be useful for freeing up resources and coordinating with like-minded partners in countering Russian encroachment. Yet eastern-based warlord Khalifa Haftar provides Russia with a gateway to the Sahel as well as East Africa, potentially facilitating power projection and mineral extraction activities. Any effort to counter Russia in Libya therefore requires a plan to counter Haftar. If UN initiatives to produce elections fail and if Haftar does not adhere to U.S. warnings to stop obstructing peace efforts, Washington should sanction him and his family under authorities including the Global Magnitsky Act. Washington should also work with Egypt and the UAE especially to convey to Haftar's clique the serious consequences of deepening his relationship with the Kremlin. ❖

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