

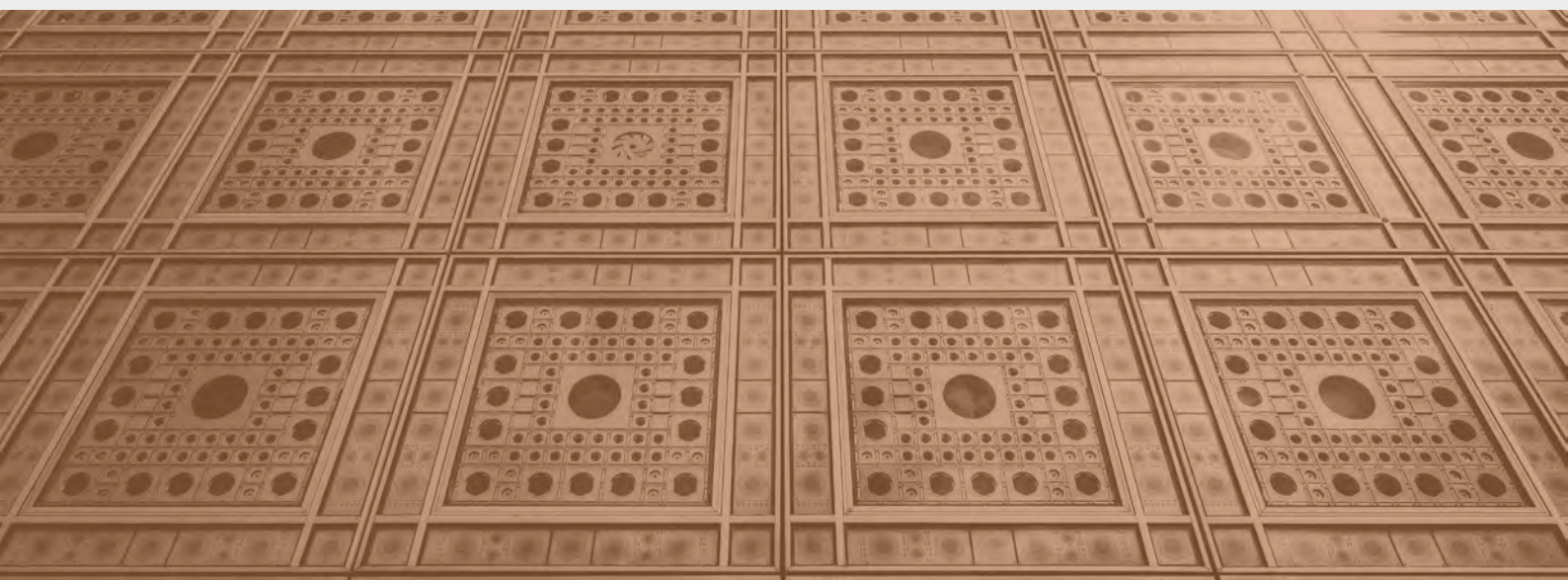


## OBSERVATORY of the Maghreb

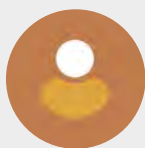
# PIPELINE POLITICS: ALGERIA, ITALY AND THE GREAT GAME IN NORTH AFRICA

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## ABOUT THE AUTHOR



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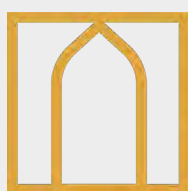
## PRESENTATION OF THE OBSERVATORY

Under the direction of **Brahim Oumansour**, Associate Research Fellow at IRIS, the Observatory of the Maghreb aims to be a platform for expertise and analysis on the Maghreb, contributing to a better understanding of the political, social, economic, security, and cultural developments of the countries in the region.

The purpose of this observatory is to create a transdisciplinary space for debate and to organize conferences, round tables, and symposiums, either within IRIS or in partnership with other French and foreign research centers and institutions. Its objective is to decipher the crises and conflicts affecting the region, explore possible future developments, and provide insights into the resulting geostrategic challenges.

The Observatory of the Maghreb is part of IRIS's Middle East/North Africa Programme, led by **Didier Billion**, Deputy Director of IRIS.

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PROGRAMME  
**MIDDLE EAST /  
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The Middle East/North Africa Programme aims to decipher and put into perspective the evolving political, economic, social, and geopolitical realities of the region. Its goal is to provide key insights, an analytical framework, and decision-making support for the various actors engaged in relations with the countries concerned.

Its areas of focus are diverse, including facilitating strategic debates, conducting studies, reports, and consultancy briefs, organizing conferences, symposiums, and seminars, as well as offering tailored training programs.

In the turbulent waters of the Mediterranean Sea, where the geopolitical shocks of the last few years are driving significant changes, the partnership between Algeria and Italy has remained consistent, in spite of the adversities. Significantly reinforced after the Russian invasion of Ukraine, bilateral ties between Algiers and Rome are certainly motivated by pipeline politics, which have pushed Italian governments of different political orientation to diversify energy supplies away from Russia. Given its geographical location, Italy has carefully recalibrated its policy with a renewed attention to North Africa, in particular, and the African continent in general, epitomised by the renowned *Piano Mattei* (Mattei Plan) for Africa that includes Algeria as a key partner. On the other hand, warm ties with Rome have provided Algeria with a renewed opportunity to market its oil and gas resources to the West, reinforcing its traditional non-aligned stance in diplomacy despite the strategic partnership with Moscow. A win-win situation in an increasingly fragmented region, where growing polarisation has sidelined traditional actors such as France, due to the stiff competition with Italy in the Maghreb and the zero-sum game going on between Algeria and Morocco, particularly on the Western Sahara conflict.

## ENERGY SECURITY

At the very exact moment in which diplomatic relations between Algeria and France seems to deteriorate rapidly, the official visit to Algiers of the Italian Foreign Minister Antonio Tajani on 3 March 2023 showed the extent of the convergence with Rome. Meeting with the Algerian President Abdelmajid Tebboune, Tajani emphasised the excellent ties, confirming Algeria as a key partner in North Africa. Energy security figured prominently in the talks with Algerian Foreign Minister Ahmed Attaf and Energy, Mine and Renewables Minister Mohamed Arkab, which also touched upon the *South2Corridor*, an ambitious project that is expected to deliver 4 million tonnes of hydrogen per year from Algeria to Europe by 2030. Part offshore, the 3,300 km pipeline will pass through Tunisia before reaching Italy, Austria and Germany, becoming a key component of the German Italian Action Plan signed by German Chancellor Olaf Scholz and Italian Prime Minister Giorgia Meloni in November 2023. In the long run, the *South2Corridor* (included in the list of projects of Common and Mutual Interest by the EU<sup>1</sup>), is expected to realise Algeria's ambitions to become the main regional energy hub also for renewable energies such as green hydrogen, supporting the EU's energy transition.

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<sup>1</sup> Pier Paolo Raimondi and Max Münchmeyer, "From Interconnection to Integration: German-Italian Energy Relations and the South2 Corridor", *IAI Commentaries*, January 19, 2024, Istituto Affari Internazionali (IAI), <https://www.iai.it/en/pubblicazioni/c05/interconnection-integration-german-italian-energy-relations-and-south2-corridor>.

Concerned by the extreme volatility in Libya (an oil giant that has suffered from the consequences of the decade-old civil war that has engulfed the North African country in a permanent transition), Italy is well aware of the importance of Algeria for its energy mix, as shown by the visit of Meloni herself in January 2023. By that time, her predecessor (former governor of the Central Bank of Europe, Mario Draghi) had already overseen the signature of a landmark agreement between the Italian national oil company *Ente Nazionale Idrocarburi* (ENI) and its Algerian counterpart Sonatrach: signed in 2022, the deal aimed at increasing Algerian gas exports from 22 to 31 billion cubic metres per year, thus pushing the offshore Trans-Mediterranean gas pipeline to full capacity and reducing Italy's reliance on Russian energy imports. While at the time of the deal, Italy was importing from Moscow most of its total gas imports (about 40%), Algeria has now become the main provider of natural gas<sup>2</sup>. At the same time, it is worth noting that by 2030 the TransMed gas pipeline is expected to be repurposed for the transport of green hydrogen, in line with the ambitious *SouthH2Corridor* project.

## A COMMON FRIEND IN NEED

Considering the uncertainty surrounding the future of the *Gasdotto Algeria Sardegna Italia* (GALSI, a gas pipeline project agreed in 2007 but apparently shelved), energy supply from Algeria to Italy will keep transiting through Tunisia, a common friend in need of assistance in navigating the complex geopolitics of the new Mediterranean Sea. TransMed already passes through Tunisia and is considered a vital infrastructure for its beleaguered economy, in distress since at least the Jasmine revolution that ousted President Zine el-Abidine Ben Ali. A 10-year agreement signed in 2019 with ENI, allowed Tunisia better conditions in terms of gas offtakes, needed to keep the engine running despite the economic downturn<sup>3</sup>. The 2022 ENI-Sonatrach agreement to increase gas supply via TransMed has inevitably improved Tunisia's outlook, but it has also reinforced the impression of a strengthening axis between Algeria, Italy and Tunisia, which are now enjoying excellent relations among each other. Particularly after the authoritarian drift promoted by President Kais Saied following July 25, 2021 power

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<sup>2</sup> Algeria supplied 34% of Italy's total gas imports in 2024, while until 2021 it was the third largest supplier of natural gas to Italy. Caterina Roggero, "Algeria and Italy: A New Era Scattered with Challenges", *ISPI Commentary*, September 4, 2024, Italian Institute of International Political Studies (ISPI), <https://www.ispionline.it/en/publication/algeria-and-italy-a-new-era-scattered-with-challenges-183086>.

<sup>3</sup> Geoff D. Porter, "The Algerian Natural Gas Heating Italian Homes - And Causing Social Unrest in Tunisia", *New Lines Magazine*, July 11, 2024, <https://newlinesmag.com/reportage/the-algerian-natural-gas-heating-italian-homes-and-causing-social-unrest-in-tunisia/>.

grab<sup>4</sup>, Tunisia has become a priority for policymakers in Rome, aware of the utmost importance of the North African country for stemming the flow of migrants along the Central Mediterranean Route.

*Realpolitik* and converging views on the migration issue (which clearly informs the *Piano Mattei* that unsurprisingly includes Tunisia among its main partners) have pushed Meloni to cultivate close ties with Saied on behalf of the EU, resulting in the July 2023 joint visit to Tunis with the President of the European Commission Ursula von der Leyen and the former Dutch Prime Minister and current Secretary-General of NATO Mark Rutte. According to the Memorandum of Understanding (MoU) signed on the occasion, Tunisia would have immediately received €112 million for border management, anti-smuggling, return and addressing the root causes of migration, part of a €1.15 billion comprehensive package from its European partners. A welcomed support for the cash-strapped public finances of Tunisia, also considering the impasse reached in the negotiations with the International Monetary Fund over a new offer of assistance. A debt-averse country after the traumatic experience of the black decade, Algeria too has played its part in the financial backing of Tunisia, a neighbouring country and close security partner. According to some estimates, Algeria has provided a loan of US\$200 million and a grant of US\$100 million in 2022, after a US\$300 million loans given in 2021<sup>5</sup>.

## A CUMBERSOME NEIGHBOUR

Algeria and Italy do not have shared interests and immediate concerns only in Tunisia. Libya, where both Algiers and Rome are known to have sided with authorities in Tripoli against the eastern-based rival Government of National Stability (GNS) backed by Gen. Khalifa Haftar and his Libyan National Army (LNA), figures prominently on their agenda too, due to the security threats stemming the divided country. Italy in particular has had close relations with the Government of National Unity (GNU) of Prime Minister Abdul Hamid Dbeibah, considered instrumental for its antimigration policies<sup>6</sup>. At the same time, energy security remains the

<sup>4</sup> Umberto Profazio, « The New Tunisian Order », *Observatoire du Maghreb*, March 2023, Institut de Relations Internationales et Stratégiques (IRIS), <https://www.iris-france.org/en/174924-the-new-tunisian-order/>.

<sup>5</sup> Zine Labidine Ghabouli, “Tunisia in its African Neighbourhood: Economic Opportunities and Political Challenges”, in *Tunisia in Context: Local, Regional and International Dynamics under Kais Saied*, ed. Akram Ezzamouri (Rome: Istituto Affari Internazionali, 2024), <https://www.iai.it/sites/default/files/9788893683234.pdf>.

<sup>6</sup> In January 2025, the partnership has been pushed to the extremes by the Meloni government, which has sent back to Tripoli a Libyan militiamen wanted by the International Criminal Court (ICC) for alleged war crimes and crimes against humanity, after having arrested him on his soil a few days earlier. The circumstances of the release of Osama Najeem (also known as al-Masri) have prompted the ICC to issue a statement recalling member countries to cooperate fully with the Court. Tarek

leitmotiv of the partnership also considering the importance attached to joint critical infrastructures such as the *Greenstream* gas pipeline connecting Zawiya to Gela, despite the pipeline has run at a very low capacity during the last few years. In spite of all this, ENI has been investing in Libya, both offshore (where it is expected to develop two gas fields following a US\$8 billion deal signed in January 2023 with the Libyan National Oil Corporation – NOC); and onshore, where it has kept its eyes on the Ghadames Basin, confirming its broad interest in the upcoming 2025 licensing round.

Algeria, which has also set its sights on the nearby and promising Ghadames Basin and whose Sonatrach has already resumed operations in Libya in 2024, irremediably looks at its eastern neighbour in a different fashion. Counterterrorism remains paramount, particularly after the January 2013 attack against the Tigantourine gas facility near In Amenas (along Algeria's eastern border with Libya) caused 67 deaths. The attack was carried out by jihadists of the *al-Mourabitoun* terrorist group led by Mokhtar Belmokhtar, who had often used Libya as a launchpad to stage attacks in neighbouring countries or as a safe haven where to regroup and find shelter after operations abroad. Despite the mitigated terrorist risk compared to its most recent past, Libya's fragmentation and porous borders remain a source of concern for the Algerian establishment, also considering the precarious situation and proliferation of armed groups in the Sahel region. Nevertheless, the main difference in terms of perspectives is that while Italy looks at Libya as an energy supplier, Algeria inevitably sees its cumbersome neighbour as a competitor, diminished due to its most recent domestic instability and civil war, but still able to compete for the same market shares, particularly in the EU.

## THE WAR OF THE PIPELINE

In the very long run, pipeline politics will be another important component of the resuming competition between Algeria and Libya, particularly in the Sahel, where ambitious projects to bring natural gas from Nigeria to Europe have been presented. A late comer in this sort of new "great game" for energy supplies in North Africa, Libya has thrown its hat in the ring in 2022, when the former Minister of Oil and Gas of the GNU Mohammed Aoun revealed a study for a gas pipeline from Nigeria to Libya passing through Niger. Preliminary notes were exchanged during meetings held at African Petroleum Producers Organisation (APPO), but the extreme volatility in the Libyan oil industry (where since then Aoun has been suspended and replaced by his deputy Khalifa Abdel Sadiq; and the leadership of NOC changed three times in a span of

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Megerisi, "Libya Is the Forgotten Wasteland of the International Order", *DAWN*, March 7, 2025, <https://dawnmena.org/libya-is-the-forgotten-wasteland-of-the-international-order/>.

three years passing from Mustafa Sanalla to Ferhat Bengdara and recently to Masoud Suleiman Musa) has put the project on hold, at least for the time being. To the advantage of Algeria, which has intensified negotiations with Niger and Nigeria for its Trans-Sahara Gas Pipeline (TSGP) that would reinforce its status of energy hub in North Africa.

Originally proposed in a 2002 MoU between Sonatrach and the Nigerian National Petroleum Corporation (NNPC), the project was swiftly resumed by Algeria after having been challenged by new projects coming from neighbouring and rival Morocco. Engaged in a standoff with Algeria since the two sides severed diplomatic ties in 2021, Rabat has favoured the Nigeria-Morocco Gas Pipeline (NMGP), an extension of the existing West African Gas Pipeline. The diplomatic crisis with Algeria and the latter's decision not to renew the contract for Maghreb-Europe Gas Pipeline (MEGP), thus depriving Morocco of transit fees and gas offtakes in especially hard times for the Moroccan economy due to the COVID-19 pandemic and global supply chain crisis, has given a renewed urgency to the project, which has also the backing of the Economic Community of West African States (ECOWAS). The ongoing war of the pipelines<sup>7</sup> is inevitably influenced by the most recent developments in the Sahel, where France has lost ground to competing powers such as Russia, especially after a string of military coups in Burkina Faso, Mali and Niger between 2021 and 2023 led to their suspension and withdrawal from ECOWAS and the establishment of the Alliance of Sahel States.

## THE COUP BELT

The coup belt in the Sahel has irremediably changed the outlook for France. After seeing its influence receding in North Africa following Italy's successful inroads in Algeria, Libya and Tunisia, the end of its military presence in the Sahel has left Paris with only one option left: Morocco. In a letter sent on 30 July 2024 to celebrate the 25<sup>th</sup> anniversary of King Mohammed VI's rule, French President Emmanuel Macron acknowledged the sovereignty of Morocco over Western Sahara, deeming the 2007 plan for limited autonomy of the disputed region presented by Rabat as the only basis for conflict resolution. Considered the "prism through which Morocco views its international environment" and measures the sincerity of its friendships, the Western Sahara has for years strained relations between Paris and Rabat, where resentment has grown, particularly after France did not immediately join Spain and, most importantly, the US in recognising Moroccan sovereignty. Seen in this light, Macron's

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<sup>7</sup> Umberto Profazio, "The Expanding Ramifications of the Maghreb Rift", *Trends Research and Advisory*, August 11, 2022, [https://trendsresearch.org/insight/the-expanding-ramifications-of-the-maghreb-rift/?srsltid=AfmBOopTDOAtfTVX-v\\_UIFRBG36AYW\\_GHf5dWCObi37r9Jf1ixF3UiR2](https://trendsresearch.org/insight/the-expanding-ramifications-of-the-maghreb-rift/?srsltid=AfmBOopTDOAtfTVX-v_UIFRBG36AYW_GHf5dWCObi37r9Jf1ixF3UiR2).

move to end decades of French neutrality and align with Morocco on the issue appears as the necessary price to pay in order to maintain some leverage in the wider region, even if that same move has considerably widened the gap with Algeria.

Despite the most recent diplomatic escalation with France, Algeria has paradoxically suffered from the receding French influence in the Sahel, where until recently it was enjoying very good relations with its southern neighbours. Cracks have started to appear immediately after the military coup season, particularly in Mali, where in late December 2023 the military junta summoned the Algerian ambassador over what the government in Bamako described as interferences and unfriendly acts; and Niger, where tensions are brewing with Niamey, especially over migrant pushbacks. The special relationship with Russia is also under strain in the remote borderlands, specifically over the presence of thousands of mercenaries and private military contractors that have been recruited by the Wagner Groups and now are part of the brand new Africa Corps, under the control of the Russian Minister of Defence. The incident in Tinzaouaten (along the border between Algeria and Mali) in the summer of 2024, when dozens of Russian mercenaries were killed in clashes with local Malian groups, was a turning point, prompting the Algerian government to protest against the presence of mercenaries fuelling instability along its borders and reaffirm its traditional rejection of foreign military presence in neighbouring countries.

## POWER COMPETITION

The hostile environment surrounding Algeria has pushed the decision-makers to promote a foreign-policy shift for the region, envisioning a unilateral option with like-minded countries. Efforts to establish a trilateral grouping with the GNU in Tripoli and the Tunisian government have been portrayed as aiming to overcome the impasse reached at the *Union du Maghreb Arabe*, paralysed due to the deadlock between Algeria and Morocco. If consolidated, this push will likely lead to a further marginalisation of Rabat, which is nonetheless pursuing alternative options, be it the ambitious NMGP or the most recent Atlantic Initiative announced by King Mohammed VI to facilitate trade access to the Atlantic Ocean for landlocked countries in the Sahel via the Dakhla Port in the Western Sahara (thus obtaining implicit recognition). Morocco's recent openings to Nigeria and the Sahelian states have the potential to undercut Algeria's plans and undermine the traditional Abuja-Algiers-Pretoria axis on which Algeria has long relied. At the same time, Niger plays a key role, considering its involvement in the TSGP and the Trans-Sahara Highway as well. Strained relations between Algiers and Niamey do not

bode well for both projects, considered vital for Algeria's economic statecraft in the wider region.

As the only Western country that has maintained a military presence in Niger after the coup<sup>8</sup>, Italy finds itself in a peculiar position, perfectly able to mediate and mend ties between Algiers and Niamey. The management of migratory flows from sub-Saharan Africa remains an obsession for the Meloni government and could offer a chance for negotiations, facilitated by a common aversion to the French presence and influence. In general, power competition between Paris and Rome remains the main driver for Italy's foreign policy in the region, of which the *entente cordiale* between Algiers and Rome is mainly a byproduct, further consolidated by relevant energy flows. Despite the very ambitious goals of the Italian flagship *Piano Mattei*, efforts to extend and reinforce the bilateral cooperation to other sectors are still hesitant, including in the arms industry<sup>9</sup>. For all these reasons, pipeline politics is expected to remain front and centre in the agenda, a trend that could deepen the fracture in the Maghreb in the short term, fragmenting the sub-region in rival blocs led by Algeria on one side and Morocco on the other; and exacerbate the competition over rival pipeline projects in the Sahel in the long run.

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<sup>8</sup> Judith Renoult, "L'Italie, dernier partenaire occidental du Niger", *Le Monde*, July 23, 2024, [https://www.lemonde.fr/afrique/article/2024/07/23/l-italie-ultime-partenaire-occidental-du-niger\\_6256111\\_3212.html](https://www.lemonde.fr/afrique/article/2024/07/23/l-italie-ultime-partenaire-occidental-du-niger_6256111_3212.html).

<sup>9</sup> Interestingly, the joint venture between the Italian company Leonardo and the Algerian Defence Ministry for an assembly line of helicopters in Sétif has just started to bear its fruits, but the sector remains heavily dominated by Russian arms imports.

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