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NATO LOOKS SOUTH: priorities, strategies and instruments

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The Russian invasion of Ukraine has changed the way the North Atlantic Treaty Organization (NATO) addresses security challenges on its southern flank. At the Madrid summit (29-30 June 2022), the allies acknowledged the importance of the Mediterranean, North Africa, the Sahel and the Middle East as a space of global geopolitical competition and an area with worrying levels of human insecurity and foci of instability.

NATO could play a more constructive role on its southern flank by: 1) improving stabilisation and crisis management approaches and instruments; 2) finding ways to transform partners from security consumers to security providers; 3) enhancing NATO maritime capabilities and partnerships; 4) strengthening coordination and cooperation with the European Union (EU) and, when possible, with other regional organisations; 5) exploring common ground among NATO's Mediterranean members; 6) increasing anticipation capacities, including by cultivating a more structured relationship with political, economic and social experts and research centres.

The main priority at NATO's Madrid Summit (29-30 June 2022) was the security challenge posed by the Kremlin. However, the 30 members of the alliance also found time to pay attention to its "southern flank", a vast geographic ensemble ranging roughly from the Sahel to the eastern fringes of the Middle East. Concerned by the multifaceted instability in these regions and their implications for the security of the Mediterranean basin, over the past three decades NATO allies have explored various avenues to enhance their cooperation with partner countries on their southern periphery. With the outbreak of the Ukraine war, challenges in and from the south have gained a new sense of immediacy and urgency.

Well before the war in Ukraine, the alliance made reference to a 360-degree approach to deter and, if necessary, respond to threats emanating from different origins; taking into equal consideration all allies' threat perceptions and security priorities. The **Projecting Stability** concept launched in 2016 acknowledged the continuum between east and south, and paved the way to the recognition of new challenges linked to global phenomena such as climate change and food insecurity, which are particularly disruptive in NATO's southern neighbourhood.

In 2022, the south is explicitly part of this approach. Article 11 of NATO's new **Strategic Concept** states that "conflict, fragility and instability in Africa and the Middle East directly affect our security and the security of our partners" adding that "this situation provides fertile ground for the proliferation of non-state armed groups, including terrorist organisations. It also enables destabilising and coercive interference by strategic competitors". Undoubtedly, the insecurity in and from these regions is a matter of concern. The question is what NATO can do to enhance its contribution to the stabilisation of its southern periphery while ensuring its efforts are not misinterpreted by societies and governments in these regions. The intervention in Libya has left deep scars on public opinions across the region and reinforced some pre-existing concerns about NATO's allegedly imperialistic ambitions.

The diplomatic incident between Mali and Spain right after the meeting is illustrative of the sensitivities NATO should take into consideration. Right after the Madrid Summit, where the allies expressed their concerns

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about the Sahel region and announced the launch of a comprehensive defence capacity building programme for Mauritania, the **Malian government** summoned the Spanish ambassador to Mali, and informed him that the Spanish foreign affairs minister's comments that NATO could not rule out an intervention in the country were "unacceptable, unfriendly, serious", because "they tend to encourage an aggression against an independent and sovereign country". This recalls the reluctance several North African countries expressed in the 1990s when the then-existing Western European Union launched the European Maritime Force (EUROMARFOR) and the European Rapid Operational Rapid (EUROFOR). At the same time, NATO was inviting Algeria, Egypt, Israel, Jordan, Mauritania, Morocco and Tunisia to join the Mediterranean Dialogue framework in an attempt to create a cooperative environment, dissipate prejudices and misunderstandings, and build trust among parties.

It would be unwise for NATO and its 30 members not to pay more attention to the south. But there are different ways of doing so. To start with, it is important to identify the main threats and their potential implications. After that, consensus will have to be found among NATO allies' diagnoses and priorities.

One of the most significant risks NATO faces is of tackling those challenges with member states divided, or even worse, competing among themselves. It will also have to outline which are the main pressing challenges and which structural factors can be tackled collectively. This paper is a first attempt by researchers and think tankers based in southern NATO member states to contribute to this endeavour by proposing a diagnosis, outlining the different views within NATO, identifying priorities, and proposing a first battery of ideas on what to do and what to avoid doing.

Why does the south matter?

The idea of the "south" comprises the southern members of the alliance, the Mediterranean basin and adjacent territories in the Middle East and Africa. The south has mainly been associated with maritime security initiatives and the need to maintain sufficient naval capabilities to deter and respond to eventual attacks against NATO members' territories and interests. Since

September 11th 2001, the rise of terrorism has been listed as a major security threat emanating from the south. In line with the previous summits' communiqués, the new Strategic Concept has pointed out the linkages binding NATO allies' security to the stability of their southern periphery. The novelty, this time, is that

the Madrid Strategic Concept also insists on the links between regional and global security. In other words, NATO is saying that the south matters, among other reasons, because it is part and parcel of the geopolitical competition with Russia and China. Partners and global competitors will take good note of it.

Before the war in Ukraine, there was wide consensus among experts that **regional rivalries** and **intersecting conflicts** were fuelling instability in a growing number of countries that were already fragile due to the lack of legitimacy of certain governments and their repressive practices. The region had entered a period in which the interplay between domestic, regional and global challenges to the established **order** was very visible, particularly after the 2011 uprisings. The collapse of several political regimes had paved the way to the outbreak of civil wars and foreign interference. As a result, conflicts in the region became increasingly regionalised and globalised – as were their effects.

The war in Ukraine has rendered NATO's southern neighbourhood security more permeable to international dynamics. Rises in global **food** (+ 19%) and **energy prices** (gas and oil), mainly but not exclusively as a result of the

Russian invasion of Ukraine on February 24th 2022, have exacerbated pre-existing vulnerabilities and inequalities among southern societies. Food provision was already under strain in several countries in the region, which had witnessed extreme weather conditions over the last decade, and not all of them have the means to look for alternative suppliers. In collapsing economies like Lebanon and entrenched humanitarian crises such as Yemen or Syria the situation is particularly worrying. Sustained high prices for food staples will be the main challenge facing most countries in the region, including the most populous, Egypt.

This situation aggravates already difficult situations characterised by structural problems such as youth unemployment, whilst countries are barely recovering from the socio-economic repercussions of the COVID-19 pandemic, particularly in areas that rely on tourism and international mobility. All of this indicates that many societies and countries in the region are not only facing traditional security threats due to the persistence of local and regional conflicts and the actions of terrorist and criminal groups but also more and more human insecurity challenges. The precarious access to basic services like electricity and drinking water has been a persistent problem and lies behind many local protests, from the Maghreb to Iran.

Not all countries in the region perceive the war in Ukraine as a liability. Energy exporters have obtained unexpected revenues due to the increase in prices and the attempts – mainly by European countries – to diversify oil and natural gas suppliers. Courted by many Western capitals, fossil energy producers in the south are gaining confidence and influence, increasing their leverage on regional affairs. These resources allow governments to buy social peace while postponing reforms, to purchase more expensive food supplies in the global markets and to continue reinforcing the security apparatus. In that respect, the trend of militarisation is likely to persist as the top buyers were already energy exporters. Defence expenditure represents 6.7% of the GDP of Algeria, 8% in Saudi Arabia, 10% in Oman and 15.5% in Libya.

This situation also fuels already existing competition dynamics, partly but not only, around energy infrastructures and disputed maritime areas that are rich in energy resources. This has been very visible in the Eastern Mediterranean over the last decade, with disputes and alliances involving NATO members on opposite sides. The novelty is that competition is on the rise in the Western Mediterranean. Algeria–Morocco relations have reached a historic low and the conflict in the Western Sahara has been thawing since November

2020. This situation alters the way the two Maghrebi countries relate with their international partners and undermines the possibilities for developing cooperative frameworks to tackle the main security problems of the Mediterranean and the Sahel.

These security concerns and the new realities created by the Russian invasion of Ukraine have determined the way NATO addressed the security on its southern flank during the Madrid Summit. This could be summarised as an acknowledgement of its importance as a space of geopolitical competition, human insecurity and foci of instability that may also affect NATO members. The summit and the concept gave a grim picture of proliferating threats, many of which cannot be addressed with military means. In contrast, the south as a potential space for shared opportunities was largely absent. This approach could either involve NATO focusing its limited efforts elsewhere or, on the contrary, upgrading and updating its policies towards the south. NATO's southern members have a clear preference for the latter, but they do not necessarily agree on how to do it.

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For whom? The priorities of NATO's southern members

Naturally, NATO's southern members are the most concerned by security-related issues in the Mediterranean and adjacent regions. They are also the countries that have most vocally advocated for NATO to give more attention to its southern neighbours. Yet, there is room for improvement regarding the cohesiveness of their approach, to the extent that on some occasions, the Mediterranean has become a space for competition rather than coordination among NATO's southern members. The different positions regarding the conflict in Libya as well as the frequent disputes between Turkey, on the one hand, and Greece and France, on the other, are the two most striking examples. Divergent, and sometimes conflicting, perceptions of the security challenges in this region have translated into different priorities on what NATO's role should be.

Turkey's international influence has grown since the start of the war in Ukraine, reinforcing previously existing trends. One of Ankara's first decisions was to close its straits to warships and limit access to the Black Sea. It is one of the very few NATO members whose leadership maintains relatively good relations with Russia. This fact, which Ankara has been able

to combine with political and military support for Ukraine, has positioned Turkey as a potential mediator. This has allowed Turkey to promote a deal, alongside the United Nations (UN), to resume the export of Ukrainian grain. Another peculiarity of Turkey's position is that it is one of the very few European NATO states that is not part of the EU. There were some hopes that Brexit could create the conditions for a better articulation of the relationship between the EU and NATO or for the participation of countries such as Turkey and the UK in the Common Security and Defence Policy. This has not happened. Therefore, Ankara sees the new role of NATO – not purely military but also more meaningfully entering the political arena – as an opportunity. Unlike with the EU, in NATO Turkey has a seat at the table, which can be used to defend its interests more effectively. This was very visible in its determination to oppose Sweden and Finland's accession to NATO unless the two Nordic countries introduced drastic political and legal changes. In that sense, Turkey's priority is that NATO should be consolidated as a political

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forum where issues relating to its own security – including the Mediterranean and the Middle East – are discussed and one which adopts its position and wording regarding the most sensitive issue on the agenda: terrorism.

Greece, like Turkey, joined NATO in 1952 and has also attempted to combine its participation in the alliance with the maintenance of good relations with Russia. For Athens it has been much more difficult due to its membership of the EU, which has approved and enforced sanctions against Russia. Greece is also uncomfortable with the securitisation of relations with China, a major partner and investor. Regarding the southern neighbourhood, one peculiarity of Greece is that it had been upgrading its policies and alliances in the Eastern Mediterranean and the Middle East. In this area, Greece has two main concerns: migration and territorial and maritime defence, the latter having intensified due to Turkey's assertive policies and aggressive rhetoric. Athens would like to see NATO playing a larger role in confronting those insecurities, but it is also ready to explore bilateral agreements with regional and extra-regional countries. Finally, one feature of the Greek position within NATO

is that Athens does not perceive increased attention on the eastern flank to conflict with its priorities in the Mediterranean. Due to its geographical position in the confluence between the two flanks, Greece is well placed to raise the need for attention to be paid to both and to highlight the increased insecurity nexus linking them.

Italy has been paying more attention to the Mediterranean and in 2018 the Italian Ministry of Defence put forward the concept of the “wider Mediterranean” (*Mediterraneo allargato*), a vast, heterogenous and complex geopolitical area that includes Europe, the Middle East, North Africa and Sub-Saharan Africa (Western Africa, the Sahel and the Horn of Africa). The wider Mediterranean is considered a priority area of intervention for the Italian armed forces. This explains why Rome wants to strengthen NATO's southern flank, along with the alliance's eastern flank, as declared by the then Italian Defence Minister, Lorenzo Guerini. Within the framework of NATO's new Strategic Concept, it is therefore essential for Italy to ensure the alliance invests more — and better — in

the security and stabilisation of its southern flank, given the sheer number of security challenges unfolding across the region. In terms of Italy's priority countries, Libya ranks well above the rest. Libya provides and represents major challenges to Italian national interests. With Tripoli having become a battlefield for external actors' rivalries, the war

in Ukraine may open up new risk scenarios in the country. Against this backdrop, Rome needs to develop coherent and effective action for Libya's stabilisation in cooperation with the UN and NATO allies and, when doing so, establishing a cooperative relationship with two other NATO countries, France and Turkey, is key.

France is a power in the Mediterranean, but its influence extends globally. France has a permanent seat on the UN Security Council, is a nuclear power and is the fourth-largest contributor to the alliance in terms of budget and national defence spending and a country involved in power competition in other regions, especially the Indo-Pacific, where it has leverage through its overseas territories. France's role and views of NATO have recently been shaped by the risk of clashes with Turkey, by Macron's controversial statements about NATO being “brain-dead”, in reference to the lack of trust and coordination that prevailed among allies before the war in Ukraine, and by Paris's strong preference for reinforcing the EU's strategic autonomy. Whereas the Russian invasion has helped restore trust in NATO, tensions with Turkey and the willingness to strengthen Europe's strategic

autonomy – sometimes also referred to as “European sovereignty” or “European defence” – are elements that will continue to shape France’s approach towards NATO’s southern flank. At the same time, seen from Paris, the new security threats in the Mediterranean and adjacent spaces are not essentially or mainly military ones. NATO should therefore find its role and purpose in coordination with other organisations that are better equipped to deal with the root causes of insecurity than with its effects.

Spain has had a more prominent presence in NATO discussions thanks to offering to host the Madrid Summit in 2022, which also marked the 40th anniversary of Spain’s membership of the alliance. During these four decades, Spain consistently defended the need to devote more attention to the Mediterranean and to promote cooperative frameworks and build trust among partners. In that vein, Spain was one of the driving forces behind the launch of NATO’s Mediterranean Dialogue in 1994. It was therefore quite natural for Spain to seize the opportunity of the summit to draw as much attention as possible to the southern flank. The war in Ukraine altered all previous plans, but the Spanish government succeeded in finding space during the NATO summit to discuss the situation on the southern flank and ensured it was reflected in the Strategic Concept. Spain has certain distinct priorities and views other than the “let’s look south” approach it shares with other Mediterranean NATO members. For instance, unlike Greece, Spain does not advocate for a larger NATO role on migration, as this could undermine bilateral deals with neighbouring African countries. The situation in the Maghreb is Spain’s main concern. The spiralling tension between Morocco and Algeria and the global trend of normalising the weaponisation of energy and migration have only strengthened this. To the surprise of many foreign analysts and NATO staff members, NATO’s protection of Ceuta and Melilla, two Spanish enclaves on the North African coast, dominated the Spanish public debate about the alliance during the summit.

Portugal expresses the same message as Spain and the other countries – that the south deserves more attention. Yet, Africa rather than the Mediterranean shapes its southern vision. Lisbon perceives NATO and the EU to be two complementary security pillars and Portuguese troops have actively participated in NATO. The centrality of NATO and the transatlantic link for the defence of the Euro-Atlantic space were strongly defended during the Portuguese presidency of the Council of the EU in the first half of 2021 and the war in Ukraine has somewhat confirmed this approach. One of the particular features of the Portuguese case is that it aims to develop a cooperative relationship,

including in the security field, in the south Atlantic space too. The Portuguese vision of the southern flank is therefore particularly wide, with the Sahel and the rest of the African continent occupying prominent positions, and it also aims to integrate its own efforts within the frameworks of the UN and the EU. Lisbon has actively promoted the 360-degree approach and is comfortable with this idea materialising in NATO planning.

Updating the policy toolbox

While most NATO allies are focused on what is happening on the eastern fringes of the alliance, its southern members continue to insist that NATO should also pay more attention to the risks of destabilisation in NATO and the EU’s southern neighbourhood. Not only are current challenges serious, but they could be exacerbated by the repercussions of the war in Ukraine. Moreover, the mitigation of NATO and EU allies’ dependency on Russian supplies (oil, gas, fertilisers)

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lies in this wider southern periphery. Therefore, the first task NATO members, particularly the southern allies, have to address is to update their foreign and security policy toolbox:

- 1) *Improving stabilisation and crisis management approaches and instruments*, especially considering the recent lessons from engagements in Afghanistan, Iraq and the Sahel. Stabilisation efforts have shown disconnections between allies’ security priorities and local populations’ expectations. These disconnections have fuelled frustrations and distrust among local actors, undermining their sense of ownership about the support and assistance provided, and have offered a breeding ground to disinformation campaigns. These missions have also highlighted the need to rethink the comprehensive approach in order to better align institutional reconstruction efforts and national building initiatives. In that context, allies might carefully re-assess how NATO could better support its partners in and from the region.
- 2) *Renewing cooperative security policy for the south* should focus on ways and means to transform partners into security providers, rather than security consumers. One way to do that would be to develop a NATO human security approach in coordination with these regional partners. Naturally, this will require enlarging this cooperation beyond governmental spheres.

- 3) *Strengthening NATO's maritime capabilities and partnerships*, giving the alliance the means to carefully monitor and prevent the deployment of aggressive forces. In agreement with partner countries, this could even include some sort of "naval police force" in the Mediterranean or parts of it. This may be a sound proposal, particularly in light of the proliferation of threats, but it would only be actionable if Mediterranean partners agree to it and see its advantages, rather than perceiving it as potential NATO aggression or interference. In other words, this will come at the end of a cooperative process.
- 4) *Strengthening coordination and cooperation with the EU and, when possible, with other regional organisations and fora such as the African Union*; NATO should outline that its role and capacities are limited but that it can be useful as part of larger collaborative efforts, ideally under a global umbrella provided by the UN.
- 5) *Exploring common ground despite national divergences and sometimes conflicting priorities*, a major issue to be tackled among NATO's Mediterranean members. There is significant room for improvement in Turkey's relations with Greece and France, and the alliance and the other members should contribute to de-escalating tensions.
- 6) *Increasing its anticipation capacities*, among other things, by cultivating a more structured relationship with political, economic and social experts and research centres based in southern neighbour countries or NATO-based ones with relevant regional or thematic expertise.