



TOWARDS A SHARED, CLEAN ENERGY SPACE IN THE EURO-MED: OUTLINING PRIORITIES FOR THE NEXT EUROPEAN COMMISSION

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Abstract

The 2024 appointment of a new European Commission represents a moment of political opportunity for the EU to make concrete progress towards reaching energy security through decarbonisation in the wider Mediterranean area, while enhancing resilience and adaptation responses against the worsening impacts of climate change in a macro-region which has been defined as a climate change hotspot.

This window of opportunity feeds into a broader climate diplomacy momentum, as the EU is approaching several international appointments –from the heated discussions on climate finance ahead of COP29 to the upcoming update of Nationally Determined Contributions (NDCs) expected in 2025– which would benefit from a more proactive and climate-oriented EU foreign policy.

In this framework, the upcoming EU Commission has the chance to strategically plan its action to shape both its agenda for the Southern Neighbourhood and the European Green Deal's external dimension towards the establishment of a shared, interconnected clean energy space in the Mediterranean macro-region, in line with EU climate commitments.

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To this aim, this policy brief identifies some key priorities that the new European Commission will need to focus on, which tackle both the progress and acceleration of energy transition processes in Southern Mediterranean countries and a pathway of progressive integration within the two shores of the Mediterranean.

As such, the operative and financial support to Southern Mediterranean countries in the all-round development and implementation of their national long-term energy pathways will need to go hand in hand with increasing cooperation in the area of adaptation as a key element of the external dimension of the EU Green Deal and the Global Gateway.

On the other hand, extensive cross-Mediterranean cooperation at different stages of the value chains –from carbon pricing mechanisms to sharing technologies and knowledge– will prove central to the transformation of the Mediterranean basin into an integrated industrial space for the development of green supply chains, while the interconnection of electricity grids on a vertical and horizontal axis represents a natural step forward towards the creation of one energy space powered by renewable energies.

Introduction

The 2024 appointment of a new European Commission (EC) represents a moment of political opportunity to review and update the European Union (EU) approach to its Southern Neighbourhood. This would be key to making concrete progress towards the creation of an integrated Euro-Mediterranean energy space, where the pursuit of energy security and climate objectives walk in the same direction. In this framework, this policy brief aims to identify some of the main priorities that the new EU Commission should focus on to achieve energy security through decarbonisation in the wider Mediterranean space, while also working to enhance adaptation responses against the worsening impacts of climate change.

This does not only concern the EU's external projection, as the Mediterranean represents a macro-region to which both Southern European countries and Middle Eastern and North African (MENA) countries belong. The nature of the Mediterranean as a shared space (beyond any political and institutional division) becomes utterly evident when analysing the impact of climate change on this macro-area, which represents a "climate change hotspot" (UNEP, 2020). Despite a relatively low level of emission of greenhouse gases (GHGs) (Lange, 2020, p. 31), climate in the Mediterranean is changing faster than elsewhere, with temperatures expected to rise 20% higher than the global average, rainfall expected to decrease dramatically (from 10% to 30%) and sea level to rise (MedECC, 2020).

At the same time, in the next few decades Southern Mediterranean countries are expected to experience exponential growth in population (UNICEF, 2019) and energy demand. Should their current energy mix dominated by fossil fuels (OMEC, 2023) not transition towards cleaner options (along with the enforcement of energy efficiency measures), then the levels of GHG emissions across the whole Mediterranean would also increase significantly (Lange, 2020, pp. 33-34), with an incremental climate impact.

It is then clear that the trajectories of the Northern and Southern Mediterranean are necessarily intertwined, namely when it comes to a paramount process like the energy transition – with its pre-conditions, requisites, impacts, consequences, challenges and opportunities. In other words, the decarbonisation of Europe is tightly linked to the decarbonisation of the wider Mediterranean space.

Where the EU comes from (and where it needs to go)

In the past five years, the EC headed by Ursula von der Leyen has worked intensively to put energy and climate at the top of its agenda, starting with the European Green Deal – the real flagship of von der Leyen’s Commission, which encompasses multi-sectorial strategies aimed at translating into action the EU’s goal of reaching net-zero by 2050, and which also presents “a strong external dimension which will be key for its implementation” (European Commission, 2020).

After all, under the aegis of von der Leyen’s “geopolitical Commission”, the boundaries between domestic and international policy have necessarily become more blurred, thus outlining a framework where the implications of the EU’s pathway of energy transition for its external projection could emerge even more starkly – for EU countries and its international partners alike. Nevertheless, despite the external dimension of the European Green Deal being an integral part of the overall package, it is still far from representing a comprehensive framework for the EU and its member states’ foreign projection at a bilateral, regional and multilateral level (Koch & Keijzer, 2021).

The dossier of the “green transition”, encompassing the dimensions of “climate change resilience, energy, and environment”, also represents one of the main policy areas of the New Agenda for the Mediterranean, launched in 2021 to revamp the EU’s partnership with its Southern Neighbourhood (European Commission, 2021a). From a financial point of view, the New Agenda for the Mediterranean falls under the Neighbourhood, Development and International Cooperation Instrument – Global Europe (NDICI-GE), which also plays a key role in supporting the Global Gateway Initiative, the European global strategy aimed at boosting “smart, clean and secure” connectivity (European Commission, 2021b). Given its focus on climate and energy, the Global Gateway could represent a significant mechanism to advance decarbonisation in the Mediterranean space – provided that it focuses more on the EU Southern Neighbourhood, which in 2023 only represented a small percentage of the overall investments mobilised under this initiative (Rizzi & Varvelli, 2023).

All in all, despite many nominal and programmatic efforts, a more organic strategy still seems to be lacking, thus paving the way to a mostly reactive, at times contradictory, approach. An example is provided by the outbreak of the Ukraine war, which was followed by the publication of a new strategy for an “EU external energy engagement in a changing world.” While aiming to tackle the “existential threat of climate change and a burgeoning energy crisis” (European Commission, 2022), the document ends up setting a framework for cooperation again leaning towards fossil fuels and the strengthening of related infrastructures. This is particularly relevant to the Middle East and Africa, considering that, from February 2022 to April 2024, more than 40% of the energy deals signed by the EU or European countries have involved countries in these areas, and almost half of them regard oil and gas (ECFR, 2024).¹

In the absence of a true, concrete plan for cooperation on the rapid decarbonisation of the energy sector and a just energy transition, the risk is that of trapping yet again both the EU and the Mediterranean region in fossil fuel dependency. This would hinder a comprehensive and inclusive process of energy transition across the Mediterranean, thus adding additional uncertainty to the decarbonisation pathway of all parties involved.

In this framework, there emerges the need to explore how the upcoming EU Commission can direct its action to shape both its agenda for the Southern Neighbourhood and the European Green Deal’s external dimension toward the establishment of a shared, interconnected clean energy space in the Mediterranean macro-region, in line with EU climate commitments.

¹ ECFR data for the Middle East also includes Gulf countries, while African countries also include North African ones.

A different, climate-led mindset

The inclusion of the “energy and climate” dimension in a European external strategy towards the Mediterranean has mostly coincided with the creation of an additional area of cooperation. While this certainly represents a positive step, with objectives related to energy and climate also starting to appear in other policy areas, it would be key for the general EU approach to the region to be guided by – or at the very least reflect – climate strategic goals. In such a scenario, the creation of a shared, clean energy space in the Euro-Mediterranean area would be a logical consequence.

Conversely, the pursuit of such a goal needs to go hand in hand with a broad understanding of the reality of the region and its inherent barriers, on the one hand, and of the barriers represented by the current European cooperation pattern, on the other, thus launching a reflection upon the necessary changes of approach on the way towards a real strategic shift in Euro-Mediterranean relations. Far from being a merely conceptual issue, such reflection (and its implementation) represents preparatory ground to outline concrete priorities – and to include them in a sustainable and working framework.

Regional barriers: fragmentation vs. integration

The multiple ongoing conflicts, security threats and tensions characterising the MENA region in early 2024 represent the umpteenth challenge to intraregional coordination and cooperation. As such, the current situation might have reverted the well-awaited de-escalation trend that had been spreading in the region (Taylor, 2023) and that could have provided some necessary space to prioritise areas not strictly hard security-related –including cooperation around energy and climate issues–. From an EU point of view, this situation could fuel the Union’s trend to prioritise a short-term, reactive, security-driven policy approach toward the region as opposed to a more structural and long-term one (Giampaolo et al., 2021).

The political and security situation and its impact on regional stability also risk further stalling developments from an economic point of view. Overall, the MENA region historically reports poor results in terms of integration, encompassing intra-regional trade, people-to-people exchanges, and connectivity – at a digital, electricity and infrastructural level (Rizzi & Varvelli, 2023).

In the Maghreb, the notorious lack of economic integration relates to geopolitical tensions but also (and sometimes consequently) to other drivers, such as poor infrastructure, high tariff and non-tariff barriers, and a lack of trade complementarity, namely between countries with similar export profiles (such as Morocco and Tunisia, on the one hand, or Libya and Algeria, on the other). In this overall framework, multiple attempts at creating a Free Trade Area (FTA) in the Maghreb, from the one envisioned by the Arab Maghreb Union (AMU) to more recent initiatives, have so far failed (Fakir & Zeglam, 2023).

This lack of North African integration and connectivity deeply impacts the European industrial projection towards the region, mainly driven by the exploration of near-shoring opportunities that have emerged in the aftermath of the pandemic and the outbreak of the Ukraine war. In this perspective, a fragmented North Africa represents an obstacle to the creation of an energy and industrial hub in the European neighbourhood (Rizzi & Varvelli, 2023).

Another kind of barrier: the EU cooperation approach

Besides these barriers, the lack of coordination between the EU and individual member states’ national strategies also poses a challenge to the EU’s approach to the region. Indeed, national

agendas pursued in parallel or even in contradiction with the EU's broader goals concretely risk affecting the Union's credibility as a coherent and trustworthy actor.

Here, the energy domain provides a case in point: in the wake of the invasion of Ukraine, EU member states' renewed diplomatic activism aimed at diversifying gas supplies has sometimes paved the way to projects contradicting EU climate objectives (Kardas, 2024). Furthermore, the EU and its member states' quick step back towards mainly recentring relations with MENA partners around gas has been perceived as inconsistent, thus striking a blow to the Union's credibility.

All these points also highlight that the potential for genuine Euro-Mediterranean cooperation has so far been jeopardised by the European tendency to treat countries in the region as junior partners rather than equal ones. As such, the EU has tended to perpetuate a "donor-grantee" or "buyer-seller" mindset instead of engaging with its Southern Mediterranean partners in a participatory analysis of common and diverging interests, which represents the prelude of any real strategic partnership – let alone of a deeper process of integration.

On top of the agenda of the new EU Commission

Besides meeting climate objectives, the creation of an integrated clean energy system in the wider Mediterranean space would benefit the geopolitical and economic interests of all actors involved. While navigating the current climate diplomacy momentum,² the upcoming EC has the chance to define and pursue concrete goals that increasingly build in this challenging direction. Against this backdrop, this policy brief outlines some of these key elements, spanning from areas where the EU should be called on to play a support role to others where a more integrated process is needed to turn the Mediterranean into a green shared space.

Supporting the transition and its management

The March 2024 Council conclusions on Green Diplomacy call for strengthening "collaboration with partners in developing and implementing ambitious Nationally Determined Contributions (NDCs) that effectively address the commitments taken in the Global Stocktake, including 'transitioning away from fossil fuels'" (COE, 2024, p. 2). Accordingly, supporting Southern Mediterranean countries in the all-round development of national long-term energy pathways in line with a 1.5C-compatible and net-zero by 2050 scenario needs to be a real priority for the EU. Indeed, drawing long-term plans for fossil fuels phase-out is key to the orderly management of the energy transition, especially for Mediterranean oil and gas exporting countries.

To contribute to this goal, it is first of all necessary to outline what this "support" or "collaboration" should involve. From a technical point of view, and stemming from the ambition of promoting integration, it would be highly advantageous to support some form of standardisation in NDC targets and benchmarks, thus allowing for a more accurate and comparative assessment of progress and facilitating the development of initiatives that can benefit the entire region.

Moreover, when exploring what the EU can offer in this domain, climate finance plays a central role: despite its skyrocketing exposure to climate risks, the MENA region is one of the regions that receives less climate finance at a global level. Indeed, money allocated to the MENA

² The current climate diplomacy momentum could be mainly defined by two key moments ahead: the first one is the definition of the New Collective Quantified Goal on Climate Finance (NCQG), which will be discussed at COP29 in Baku, in November 2024. The second regards the submission of the new Nationally Determined Contributions (NDCs): under the Paris Agreement (2015). Parties are called to submit their NDCs, outlining their objectives on mitigation and adaptation to climate change, and to update them every five years. The next round of NDCs is due in 2025.

region within the Green Climate Fund (GCF), the Climate Investment Funds (CIF) and the Global Environment Facility (GEF) in 2023 only reached 6.6% of the total funding (Obeid & Gower, 2023). At the same time, the most ambitious emission reduction goals that Mediterranean partner countries have included in their NDCs have so far been conditional on international climate finance (Escribano et al., 2023). Since these goals will need to become increasingly ambitious, the current gap between ambitions and concrete feasibility also risks becoming wider and wider if international finance does not intervene to narrow it.

Finally, support in the development of long-term, feasible net-zero scenarios cannot leave aside a common and pragmatic reflection on what a “just transition” means in each different national context, and how it can be supported and accompanied – both by the state itself and by external partners such as the EU. This entails an identification of multidimensional risks and opportunities (namely in consideration of the huge and still unexploited renewable energy potential in Southern Mediterranean countries) lying ahead for national economies and societies, together with the instruments that could be supported to address subsequent needs in terms of economic, fiscal, labour and welfare reforms (including ad-hoc fossil fuel subsidies phase-out plans).

This is a conversation that the EU needs to further develop with its Southern Mediterranean partners –namely, with fossil fuel exporting countries– where the delicate issue of decarbonisation risks remaining an elephant in the room, especially in consideration of the solid interests that national leaderships retain in the oil and gas industry.

Setting the conditions for a green industrial space in the Mediterranean

As the EU develops its green industrial toolbox, the potential of the Mediterranean as an increasingly integrated industrial space for the development of green supply chains becomes even more central. The achievement of this goal will entail extensive cooperation at different stages of the value chains, starting with a timely reflection on how to manage the impact of the Carbon Border Adjustment Mechanism (CBAM) on Southern Mediterranean countries. A failure in this sense poses a high risk of fragmentation of the Euro-Mediterranean climate and energy space (Escribano et al., 2023).

According to a preliminary assessment by the EC considering trade flows toward the EU, Algeria, Egypt and Morocco figure among the most potentially exposed countries to the CBAM (European Commission, 2021, p. 66). To minimise the negative sides of this exposure and help maximise potential related opportunities, the EU should concretely support Southern Mediterranean countries in the development of their carbon pricing mechanisms,³ especially drawing on the presence of EU delegations on the ground to carry out an ongoing dialogue and provide constant support. While the most desirable and effective outcome would be for regional countries to re-invest the collected revenues in the decarbonisation of their local industry, in a first phase the EU could lead by example by reinvesting its CBAM revenues (or at least a part of them) in the implementation of its partner countries’ carbon pricing instruments.

At the same time, and stemming from the awareness of the historical difficulties in establishing FTAs in the region, the EU and its partners in the Southern Neighbourhood should seriously consider establishing a Mediterranean free-trade zone of zero-carbon industrial goods such as clean steel, low-carbon cement, green ammonia, and green chemicals. This would not only allow Southern Mediterranean countries to take advantage of the friend-shoring trend called for by the EU (Escribano et al., 2023)

³ At the moment, none of the countries in the region has one. Source: Carbon pricing dashboard, World Bank. <https://carbonpricingdashboard.worldbank.org/>

through the development of local decarbonised industries, but would also enhance the role of the Mediterranean region as a green industrial hub with global projection.

Needless to say, turning the Mediterranean into one shared green industrial space would positively impact the sustainable, long-term socioeconomic development of Southern Mediterranean countries. To do so, sharing technologies and knowledge (Ben Youssef, 2023, p. 60) represents a *sine qua non*. In particular, the paramount dimension of capacity-building and capacity development will prove crucial to overcoming the barriers to an inclusive green transition represented by the lack of green skills in the workforce (EuroMeSCo, 2023, p. 13). As such, stronger cooperation on job reskilling and upskilling, in line with the peculiarities of a decarbonised economy, will need to be implemented. This is key to providing human capital for the aforementioned new value chains – while laying the ground for exchanges of expertise across the basin that could also lead the way to new pathways for legal migration towards the EU.

Back to “basics” (and beyond): the electricity grid

The global energy transition needs to be underpinned by “bigger, stronger, and smarter grids” (IEA, 2023), which can allow a fast increase in electricity use. As such, grids represent a key target at a national and regional level when reflecting upon turning the Mediterranean into an integrated clean energy space. This is even more relevant as many countries in the Euro-Med region still rely on inadequate grid infrastructures, which on the one hand are designed to accommodate conventional energy sources,⁴ and on the other suffer from high electricity losses, reaching 20% of the whole capacity in North Africa (IEA, 2020, p. 32). As such, investing in the strengthening and modernisation of these electricity grids should be a top priority on the EU agenda for the region. Considering that grids can become a “bottleneck for transitions to net zero emissions” (IEA, 2023), failing to deliver on this dossier constitutes an obstacle to the energy transition process itself, well before discussing regional integration of clean energy systems.

At a macro-regional level, the interconnection of the electricity grid across the basin, both on a vertical and horizontal axis, represents a natural step forward towards the creation of one energy space powered by renewable energies. While small steps are being taken towards the creation of an integrated Mediterranean electricity network,⁵ much more consistent funds would need to be allocated to comprehensive cross-border projects targeting not only the infrastructural level but also other existing multidimensional barriers. Benefits would be technical as well as geopolitical, as additional channels of structural collaboration and political dialogue would need to be opened to guarantee the area’s stability (Cassetti & Annunziata, 2023) – provided that regional actors can find common ground to kick-start them– overcoming geopolitical tensions in light of the mutual advantages at stake. In this framework, the EU could draw on its open channels of dialogue with regional actors to highlight opportunities for convergence.

The key role of adaptation

Besides initiatives falling under the umbrella of climate mitigation, the dimension of adaptation also needs to play a major role in a region where the effects of climate change are bound to put increasing pressure on the infrastructure, the economy and the people (Ezzeldin et al., 2023, p. 7). As such, Europeans can rest assured that leaving aside this aspect risks jeopardising all efforts to promote prosperity and stability in the MENA region, thus also derailing the process of green transition while further worsening the impact of climate change as a major driver of migration.

⁴ According to a draft EU estimation circulated in November 2023, before the end of the present decade Europe will need to invest 584 billion euros to upgrade its power grids and adapt it to renewable energies. Source: Reuters, 2023.

⁵ The ELMED-TUNITA project, entailing the creation of an electricity cable between Italy and Tunisia, would represent the first interconnector between Europe and Africa. It was allocated funding for more than 300 million euros by the EC in November 2023 and should be completed by 2028 (source: Terna, 2023). Another example is represented by the EuroAsia electricity interconnector, recognised by the EU as a Project of Common Interest (PCI), which will connect Crete, Cyprus and Israel by 2025 (source: European Commission, 2022).

In this framework, the EU and Team Europe should prioritise stepping up cooperation in the area of adaptation, and make it a top priority of the external dimension of the EU Green Deal and the Global Gateway. While the EU and the EU27 are already the biggest providers of climate finance at a global level (Council of the EU, 2024), funds allocated specifically to adaptation in the MENA region need to scale up exponentially. Furthermore, adaptation finance has to be provided via instruments such as grants, to avoid overburdening partner countries with additional debt (Knaepen & Dekeyser, 2023, p. 8).

Adaptation finance should also be accompanied by increasing EU support in the development of partner countries' National Adaptation Plans (NAP), as outlined by March 2024 Council conclusions on Green Diplomacy (COE, 2024). Indeed, by November 2023 no country in the EU Southern Neighbourhood had submitted its NAP (UNFCCC, 2023, p. 19). Collaborating on the development of such plans is key for the EU to understand gaps and needs, and to tune its support accordingly, while also advocating for its partners to address existing governance challenges that hinder more effective climate action at a national level (Laanani, 2023).

The way forward

The establishment of a shared, interconnected clean energy space in the Mediterranean macro-region is a major challenge that needs to be conceived as a target destination. To reach it, a complex process needs to be put into motion with the utmost urgency. In this framework, the current moment is topical for different conjunctures: on the one hand, the above-analysed climate imperatives, which call for priority action to respect decarbonisation targets; on the other, the appointment of a new EC, which could represent a window of political opportunity to accelerate the much-needed adoption of climate and energy lenses as a framework for the EU to deal with its Southern Neighbourhood.

Such a window of opportunity also feeds into a broader climate diplomacy momentum: from the heated discussions on climate finance ahead of COP29 to the upcoming update of NDCs, all these key appointments would really benefit from a more proactive and climate-oriented EU foreign policy – which in turn would have a positive and necessary impact on EU credibility.

As analysed in this policy brief, the creation of an integrated clean energy space in the Mediterranean depends on two main factors: on the one hand, the progress (and acceleration) of the energy transitions in Southern Mediterranean countries; on the other, a pathway of progressive integration within the two shores of the Mediterranean. Beyond the above-mentioned value chains and electricity grids, such a process of integration also supposes the existence of a shared direction drawing on the awareness of common –even if differentiated– interests and benefits.

Stemming from this reflection, when approaching its so-called Southern Neighbourhood, the new EC should focus at the same time on concretely supporting the energy transition of Southern Mediterranean partner countries (in parallel with its own), and on the promotion of increased integration and exchange. In other words, translating the geography of the Mediterranean as a shared space into policy, starting from energy and climate objectives.

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