OPEN STUDY DAY

ENERGY SECURITY IN MIDDLE EAST AND NORTH AFRICA: CHALLENGES AND OPPORTUNITIES

5 DECEMBER 2019
NAPLES, ITALY
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Agenda

Thursday, 5 December

08:30-09:00  In Processing/Check-in. Royal Continental Hotel Lobby

0900-0920  Welcoming Coffee. Foyer Roof

09:20-09:35  Administrative Remarks and Welcome words
JFCNP COM, Admiral USA Navy, James Foggo
ACT ACOS SPP, Brigadier General BEL Air Force, Didier Polome
NSD-S Hub Director, Brigadier General ITA Air Force, Davide Re
Prof. Sergio Altuna (moderator)

09:35-10:00  Opening Plenary Session
Prof. Sergio Altuna (moderator)

10:00-11:20  Panel 1. Impacts of global energy demand and the Evolution of Regional Demand
Moderator: Prof. Sergio Altuna
Panelists: Mr. Riad Kahwaji and Mr. Jalel Harchaoui
Lecture by North Africa Panelist (30’)
Lecture by Middle East Panelist (30’)
Discussion (20’)

11:20-11:45  Coffee Break. Foyer Roof

11:45-13:05  Panel 2. Energy Transition and the MENA Region
Moderator: Prof. Sergio Altuna
Panelists: Dr. Carole Nakhle and Mr. Francis Ghiles
Lecture by North Africa Panelist (30’)
Lecture by Middle East Panelist (30’)
Discussion (20’)

13:05-15:00  Group Picture and Lunch (non-hosted)

15:00-16:20  Panel 3. Energy Security: Challenges and Opportunities
Moderator: Prof. Sergio Altuna
Panelists: Dr. Paul Sullivan and Ms. Rim Berahab
Lecture by North Africa Panelist (30’)
Lecture by Middle East Panelist (30’)
Discussion (20’)

16:20-16:50  Coffee Break. Foyer Roof

16:50-17:50  Closing Plenary Session
Moderator: Prof. Sergio Altuna

18:00-20:00  Buffet Reception. Top Floor
Moderator’s Biography

SERGIO ALTUNA

Sergio Altuna is an Associate Analyst in the Program on Violent Radicalization and Global Terrorism at the Elcano Royal Institute. He is also an associate professor at Universidad Pablo de Olavide (Sevilla) where he teaches history and evolution of religious fundamentalism.

He holds a BA in Translation and Interpreting from the University of Valladolid, an MA in Arabic Language, Literature and History from the University of Tunis al-Manar and a further MA in Terrorism Studies from the International University of La Rioja.

He has developed a career as an international consultant between Spain and Tunisia, where he has been based since 2010, focusing on security in North Africa and the Sahel.

He has also taught Applied Rhetoric and Discourse Techniques at the University of Jendouba (Tunisia) and at the University of the Ionian Islands (Greece).

His most recent research works focus on violent non-state actors in the Maghreb and the Sahel; the analysis of the Salafist discourse and rhetoric and the development of alternative narratives and counternarratives.
Panelists’ Biographies

RIAD KAHWAJI

Riad Kahwaji founded INEGMA in Dubai in October 2001, and has since been in charge of the company’s offices in Dubai and Beirut. INEGMA is a research house that provides consultancies on areas related to Middle East geo-political security, defense and energy. He also founded SEGMA in 2015, a leading organizer or specialized events in the fields of security, defense, energy, healthcare and new technologies. Until October 2008, he was also the Middle East Bureau Chief for Defense News, the largest selling international defense publication. He worked for Jane’s Defense Weekly as Middle East Correspondent from 1999 to 2001. He also contributed on regular basis to various Jane’s publications like Jane’s Intelligence Review and Jane’s Sentinel and Jane’s Islamic Affairs Analyst. He frequently publishes defense analysis/articles in pan-Arab Al-Hayat newspaper and professional periodicals. In 2008, he founded the first Arabic language news website called Security and Defense Arabia – www.sdarabia.com - that is dedicated to military affairs, He also has few publications in Arabic, the last one was on “The Basis of the Lebanese Defense Strategy,” produced by An-Nahar Press in Beirut in December 2009. He has been working as a professional journalist covering the Middle East since 1988. Riad has an MA degree in War Studies from King’s College, the University of London, and a BA in Mass Communication from Phillips University, Oklahoma, USA.

JALEL HARCHAOUI

Jalel Harchaoui joined the Conflict Research Unit of the Clingendael Institute in February 2019 as Research Fellow. His work focuses on Libya, covering aspects such as the country’s security landscape and political economy. Jalel holds a master’s degree in Geopolitics from Paris 8 University. His doctoral research has focused on the international dimension of the Libyan conflict. A frequent commentator on Libya in the international press, he has published widely, including in Foreign Affairs, Lawfare, Politique Étrangère, Middle East Eye, and Small Arms Survey.
FRANCIS GHILES

Francis Ghilès is one of the leading European experts on the Maghreb. A senior fellow at the European Institute of the Mediterranean, Ghilès specializes on security, energy, and political trends in North Africa and the Western Mediterranean. During his distinguished career as a journalist he spent 18 years writing for the Financial Times, and also freelanced for a number of newspapers including the New York Times, Wall Street Journal, and Le Monde. He has published numerous articles in French, English, and Spanish and is a frequent commentator in print and broadcast media. Ghilès earned advanced degrees at St. Antony’s College, Oxford and the University of Keele.

CAROLE NAKHLE

Dr Carole Nakhle is the founder and CEO of Crystol Energy, an advisory, research and training firm, awarded Best Independent Energy Consultancy – UK 2018. With a unique breadth of experience, she has worked with oil and gas companies (NOCs and IOCs) at the executive level, governments and policy makers, international organisations, academic institutions and specialized think tanks on a global scale. She is active on the Governing Board of the Natural Resource Governance Institute and Advisory Board of the Payne Institute at the Colorado School of Mines. She is a regular contributor to Geopolitical Intelligence Services and is involved in the OECD Policy Dialogue on Natural Resource-based Development, having contributed to the development of the organization’s Principles for Durable Extractive Contracts.

Dr Nakhle lectures at the Blavatnik School of Government at Oxford University, University of Surrey in the UK and Saint Joseph University in Lebanon. Her views on energy matters are highly regarded. She has published two widely acclaimed books: Petroleum Taxation: Sharing the Wealth published in 2008 and reprinted in 2012; and Out of the Energy Labyrinth (2007), co-authored with Lord David Howell, former Secretary of State for Energy in the UK.

In 2017, she gave evidence to the International Relations Committee at the UK Parliament on oil markets, the transformation of power in the Middle East and implications for the UK policy. In the same year, she received the Honorary Professional Recognition Award from the Tunisian Minister of Energy, Mines & Renewable Energy.
PAUL SULLIVAN

Dr. Paul Sullivan has been a full professor at the National Defense University in Washington, DC since July 1999. He is a world recognized expert on the politics and economics of the Middle East, energy security, water security, environmental security and economic security. He has also taught at Yale, the American University in Cairo and Georgetown. He has been an advisor to flag officers, senior officials and others for decades. Dr. Sullivan is well traveled with much hands-on and boots-on-the-ground experience, and focuses on practical and strategic problems, and their solutions.

RIM BERAHAB

Rim Berahab is an economist at the Policy Center for the New South, a think tank based in Rabat that she joined in 2014. She is currently working on themes related to energy issues and their impacts on economic growth and long-term development. Her research areas also cover trade and regional integration challenges in Africa. Previously, she has also worked on questions related to gender inequalities in the labor market of North African countries. Rim spent three months at the International Monetary Fund (IMF), in 2016, in the Commodities Unit of the Research Department. She holds a State Engineering degree from the National Institute of Statistics and Applied Economics (INSEA).
Background Reading for OPEN Study Day. Energy Security in Middle East and North Africa: Challenges and Opportunities.

Energy Security and the conceptualization of the idea

There’s no doubt there has been a recent uptick regarding general interest in energy security. This has been stirred by several factors: the steady rise of oil prices that started in 2008 and continues up to now, the difficulties and challenges arising from the supply chain itself, market volatility, the emergence of alternative energy sources and new markets and, of course, the deterioration of the international geopolitical situation, especially in important regions and countries for the gas and oil market as producers or transit countries. Definitely a wide range of aspects whose close monitoring and evaluation is not always feasible.

But what do we mean by energy security? Or, to frame it differently, what do we understand? Over the last 20 years the concept of energy security has evolved from a simple idea based on an approach emanating from the field of political economy studies to a full-fledged field of study addressing a much wider range of complex issues and developing challenges. This rapid evolution has produced not only different interpretations of the concept, but also an almost unassailable amount of scholarly and policy-oriented literature. However, if we approach the issue from a broader perspective, we can establish the 70s as the timeframe where the last great debate over the issue of energy security prompted by the different crises that arose after the cut of oil supply by the OPEC countries in 1973. Let’s not forget that during crisis the price of the oil skyrocketed and the vulnerabilities of the system were fully exposed.¹

Although energy security is now studied as a multidimensional concept made up of technical, economic, social, environmental and geopolitical aspects closely interrelated, it was considered mostly an economic issue during the last part of the twentieth century. Now, a bit the same way it happens with of terrorism, the concept of energy security is not an easy one to find consensus around its definition, largely due to the aforementioned multidimensionality and the different layers and levels of analysis we need to delve into in order to define the idea. In that sense, even if far from being unanimously agreed upon, a more or less common approach behind the definition of energy security is the absence of, protection from or adaptability to threats that are caused by or have an impact on the energy supply chain.² Nonetheless, the main dimension of energy security for consumer countries –what concerns them the most– is tightly linked with the security of the supply, which the International Energy Agency defines as the steady availability of an adequate supply of energy in the market at affordable prices.

Energy security can clearly be divided into two main ideas, two different concepts that have definitely evolved at a very fast pace in recent times. On the one hand, energy as we mean to understand it in this context, mostly but not only fossil fuels that have to be transported from one place to another. But letting aside what energy now means, if we focus on security, the fluidity of the concept itself—which has pushed to the redefinition of the policy agendas of numerous nation-states—is one the most important reasons behind the necessity to limit the concept of energy security along one or several of the following dimensions: the sources of risk, the scope of the impact measure, and different severity filters such as the speed, size, sustention, spread, singularity or sureness of impacts. Because, when we approach energy security and we try to conceptualize the idea... Security for whom? And security from what threats exactly? The challenges related to energy security are undoubtedly an issue that has generated a growing sense of urgency and uncertainty in the governments of consumer countries. Global security is an intricate and difficult to navigate field of study and it is not only complex geostrategic shifts or terrorism we should worry about, a plethora of yet understudied cyber threats is awaiting right around the corner.

Energy security is both a strategic issue and a public policy one, even if the two angles are based on different assumptions and foresee different approaches to provide security. But it is often the oversimplification in the analysis or an erroneous framing of the approach to a complex notion like energy security what prevents understanding the whole concept in a more adequate way, going through and dealing with all its layers and considering all its nuances and acceptations.

**From the four ‘A’s to the four ‘R’s**

A frequent starting point of contemporary approaches to energy security studies, and one we can take as agreed upon to a certain extent, revolves around the model of the four ‘A’s, namely availability, affordability, accessibility and acceptability. All of them being highly volatile while confronted to stress situations, uncertainty, and insecurity, the main sources of concern regarding these four ‘A’s. Uncertainty affecting the availability, a temporary or permanent, partial or total, interruption of the supply. Economic uncertainty or economic insecurity can easily lead to unaffordability arising from the price volatility resulting from physical disruptions or speculative movements in the markets. Physical insecurity or the inability to extract these reserves and transport them to world markets. And social insecurity, as price increases generate social demands, for example by the most energy-intensive sectors, eventual conflicts, social unrest, etc.

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During the last years, however, the increasing concerns regarding the environmental impact of human energy consumption have not only shown the limitations of energy security knowledge in prospective policy making, but have also put the focus on the fact that a conscious development is going to be essential to the economy of any given country. It seems therefore more than necessary to implement a strategy that allows facing the challenges that are already arising in the short, the medium and the long term.

A methodology looking to lay the groundwork regarding how energy security could be improved and at the same time fostering energy-related climate change policies is that of Dr. Larry Hughes. His paradigm, even if not a one-suits-all strategy to be followed by every single country, depicts a very interesting –and hopefully effective– methodology to raise awareness of the importance and great implications of energy security as well as to further engage both policy analysts, practitioners and politicians on how it could be improved.

This model consists of four ‘R’s: review, reduce, replace and restrict. Reviewing implies carrying a quantitative and qualitative evaluation of all aspects by energy sector, from the sources, to the potential future supplies, the suppliers, the supply chain, the infrastructure, etc. The second R stands for reduce, i.e. limiting the amount of energy we use which, to be accomplished, could be approached implementing two different strategies: assuring better levels of energy conservation and fostering an enhanced energy efficiency allowing where possible to provide and reach similar performance levels with less energy.5

On the other hand, the second two ‘R’s as outlined by Hughes imply adopting an even more proactive role: first replacing those sources judged inefficient or insecure during the review phase, or, if possible, introducing new alternative energy sources, a process that may well also involve the replacement or modification of old infrastructure. And finally, restrict, or limiting and reducing new demand only to secure energy sources by creating new legal precedents for those industries and business sectors experiencing an increased demand for energy supplies.

**Adding the fifth R: rethinking the future of energy security**

Security is to be seen as a treacherous and ambiguous concept if used without limitations. Even if difficult to put in practice, Hughes method of the four ‘R’s remains a very interesting approach to the evolution of energy security that seeks to raise awareness among policy makers and advocate for a new path, one that brings forth an alternative that aims to include clear limits to ensure a more responsible paradigm of energy consumption and incorporates social wellbeing at the center of the equation.

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Much of the discourse on energy security until recently was substantiated on the assumption of infinite growth, focusing, as a result, on the economic and political facets of energy security and on assuring that energy markets can continue functioning at affordable prices, leaving climate change out of the main focus. And that even if a strong sustainability component was long ago introduced in the debate, for example by The World Bank in the early 90s. However, incorporating sustainability to the table hasn’t succeeded in putting environmental and developmental challenges in the center of the debate. And these are unavoidable challenges of crucial importance both for this and for future generations. Are we then in the middle of yet another great debate over the issue of energy security?

Fostering security is a task that always involves costs and that implies giving up on several goals while prioritizing others. Resources, of course, are limited and adopting a particular strategy regarding energy security could mean a huge expense with little or no economic return in the medium to long term. It is of special importance to set this clear because it can mean the difference from becoming a pioneer or a very secondary player. While already facing global energy transition, it has become clear that the current trends will end up reshaping the energy landscape, and therefore, energy security with it.

And it is now when rethinking enters the scene: if we reassess the idea of energy security thoughtfully, we might end up concluding that the concept of security, when used by the proponents of prioritizing a greater economic and geostrategic component is not that far away from the way it is understood by those advocating of a greater importance of the environmental element. Reevaluating what the priorities of energy security are and rethinking new and alternative energy paradigms is a challenge that should encompass –or that should have a page specifically dedicated to– making it more sustainable, promoting a healthier energy security model in which sustainability, in every sense of the word, doesn’t lag far behind other axes such as security and affordability of the supplies.
Key Themes for Each Panel

**Opening Plenary Session**

The Moderator of the Study Day will frame the discussion and challenges with an introductory presentation on global issues related to energy security in MENA.

*Opening presentation:* Prof. Sergio Altuna

**Panel 1. Impacts of global energy demand and the Evolution of Regional Demand**

Mr. Kahwaji will focus on growing energy demand in Asian powers and how will this ultimately compel more ME oil producers to pivot to Asia.

Mr. Harchaoui will lecture on the counterintuitive role oil has played in the Libyan crisis since 2011.

*Moderator:* Prof. Sergio Altuna.
*Panelists:* Mr. Kahwaji and Mr. Harchaoui

**Panel 2. Energy Transition and the MENA Region**

Mr. Ghilès will deal with the issue of energy transition in the Mediterranean, focusing on the different speeds depending on the country.

Dr. Nakhle will lecture on the energy status of the Middle East and what energy transition really means for the region: What are the targets and ambitions? Are there any concrete developments? Are we talking about complementarity or conflict between the oil and gas sectors?

*Moderator:* Prof. Sergio Altuna.
*Panelists:* Mr. Francis Ghilès and Dr. Nakhle.

**Panel 3. Energy Security: Challenges and Opportunities**

Dr. Sullivan will speak about energy shipping and energy infrastructure security with a focus both on physical and cyber threats including: drones, missiles, AIS shut offs, Iran, the Houthis, ISIS, AQAP, works, viruses, geopolitical and local tensions etc.

Ms. Berahab will deal with the concept of energy security and its link with economic welfare and long-term development focusing on the aspects of diversification of the energy mix, energy cooperation, etc., trying to identify both challenges and opportunities to ensure security of energy supply.

*Moderator:* Prof. Sergio Altuna.
*Panelists:* Dr. Paul Sullivan and Ms. Berahab

**Closing Plenary Session**

The aim of this section is, based on the presentations and discussions, to reflect and summarize the challenges and opportunities identified during the Study Day.

* Moderator: * Prof. Sergio Altuna.
NATO Allied Command Transformation
Strategic Plans and Policy
Fact Sheet – The OPEN Capability

Warfare Development  Allied Command Transformation (ACT) is NATO’s warfare development command for the Alliance. ACT conducts strategic-level research, analysis, and conceptual development in order to identify potential threats and opportunities to inform strategic decisions. ACT leads Warfare Development with and amongst partners, including nations, International Organizations/Nongovernmental Organizations, public and private sectors, as well as civil society entities, academia, industry, think tanks, Centers of Excellence, and other national entities.

Views of Others  OPEN is short for Open Perspectives Exchange Network. OPEN began as an experiment in 2016, transitioning to a capability after its participation in the NATO Summit in 2018. The basis of OPEN is to identify the benefits, ways and means associated with a non-classified human network exchanging views and ideas on topical matters of relevance to the Alliance. NATO aspires to have persistent 360-degree strategic awareness in order to be able to anticipate events of relevance to the Alliance. Also high on NATO’s agenda is the building of practical relationships through dialogue, on matters of mutual interest, with non-NATO actors. Having a relatively informal, yet dynamic conversation space in which HQ SACT is able to engender the views of others on matters of interest to the Alliance, offers a powerful addition to the results from NATO’s traditional relationship-building and fact-finding activities. An OPEN network, stimulated by NATO, helps deliver transformational capability by expanding the reach and breadth of Alliance understanding of nascent situations and trends.

OPEN Capability  Since 2018, the OPEN discovery capability has explored the means by which NATO might improve its strategic understanding and anticipation, while improving NATO’s ability to federate with non-NATO actors. The OPEN Capability is relevant for HQ SACT as part of the NATO Military Strategy in order to ensure awareness and cohesion. Awareness is the prerequisite to implementation. While there are many providers of political-, economic-, and military-relevant content, OPEN seeks to connect readers from military organizations, international organizations, non-governmental organizations, think tanks, private industry, and academia. OPEN aims to provide insightful content through multiple digital platforms.

Headquarters  NATO Allied Command Transformation, Strategic Plans and Policy Branch.

Publications & Seminars  A dynamic and growing set of media products are available online.

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NATO Strategic Direction South Hub

A MEETING ROOM FOR PEACE AND STABILITY

It has been understood for some time that good communication is the basis for positive, long-term relationships. Trust and confidence can only be built if all parties involved feel free to express their opinions, suggestions and concerns in an environment surrounded by individuals with the same communicative approach. Perhaps even more important, however, is listening, since being heard is absolutely necessary for one to believe they are understood. Obtaining and maintaining peace is the fundamental goal of NATO which firmly believes that such open, bilateral communication is intrinsically linked to its achievement.

With this in mind, the NATO Strategic Direction-South Hub (NSD-S Hub) initiative was devised and formally brought into existence in September 2017, reaching full capability in July 2018. Prevention is always preferable to cure, and long-term stability can be achieved by effective horizon scanning to better understand, anticipate, limit or even resolve challenges. The Hub acts as a meeting room for the achievement of this goal by being a conduit for open information sharing. It is a ground-breaking forum which connects NATO allies and partners with subject matter experts (SME) from local and regional institutions including universities, research centers and non-governmental organizations from North Africa, the Middle East, Sahel and Sub-Saharan Africa so that all matters pertaining to the south can be better discussed, understood and, whenever possible, remedied.

An old African proverb states, "If you want to go fast, go alone. If you want to go far, go together." On this basis, the HUB adopts a holistic, collaborative approach at all times so that independent local knowledge and experience is genuinely heard, replacing what might often have been a well-intended but sometimes pre-conditioned perception, with a more accurate awareness brought about by an attentive inclusion of all relevant parties. The unique role of the Hub is to connect allies, partners and international, non-governmental and civil organizations by creating fluid dialogue resulting in universal understanding, trust and stability.

With this in mind, the HUB is constantly looking to adapt and is ready to face new challenges in the security environment in support of NATO’s core tasks and values. The HUB is looking to increase NATO’s situational awareness by coordinating, collecting and understanding the vast array of MENA-specific information available, while also focusing on the challenges and opportunities from Strategic Direction South. It does this by:

CONNECT – CONSULT – COORDINATE

The Hub aspires to:
- **Connect**: creating connections where previously only barriers have existed.
- **Consult**: improve the consultation process so that all those involved feel at liberty to contribute while trusting that they will be heard.
- **Coordinate**: pro-actively assist NATO to better coordinate with its Allies and partners in the south in order to achieve the desired safe, secure and stable environment.

FIND US HERE
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After Action Report

Energy Security in Middle East and North Africa:
Challenges and Opportunities
Naples, 5 December 2019

This purpose of this document is a two-fold: on the one hand, to summarize the most important messages that arose throughout the study day on energy security in the Middle East and North Africa and to briefly assess the level of attainment regarding the initial objectives of the event. On the other hand, the document also intends to contribute to NATO’s objective of attaining clarity of understanding in this specific field by suggesting possible actions the Alliance could take both to build strategic awareness as well as to be better prepared to be able to anticipate events of relevance as far as energy security is concerned.

General Overview

The study day was successfully co-organized by NATO’s Strategic Direction South - Hub and NATO’s Allied Command Transformation and was held in Naples on December 5, 2019. The event revolved around three main axes focusing on the following issues: the impact of global energy demand and its evolution, energy transition in the region and a more prospective panel regarding challenges and opportunities in the complex field of energy security.

The panelists were all top-level experts and academics with proven extensive experience if their respective fields of expertise. Furthermore, the majority of the panelists are renowned specialists from the MENA region and/or having spent significant parts of their professional life living there, therefore fulfilling one of the main objectives of the study day: not only organizing a high-level event from which the Alliance can obtain valuable information, advanced knowledge and helpful insights, but also facilitating the right context in which connections and contacts with renewed experts, practitioners and academics could be made and possibilities of further cooperation and synergy could be explored.

According to the evaluation efforts carried out by the moderator both with the different panelists as well as other feedback collected from NATO officials through informal conversations during the different coffee breaks and other informal meetings, the two main objectives of the study day were largely and satisfactorily fulfilled. Furthermore, not only the subtopics of the study day were judged as appropriate and timely; the panelists as well as their lectures individually were also of the highest level, completely in line with the level of expectations and the target public.

Study Day Cross-Cutting Ideas and Core Messages

Changes are not imminent

Globally speaking, the decline in the demand from traditional big importers is already being compensated by the increase in imports from other regions of the world, particularly from Asia. In the MENA region energy demand is also increasing but at different rates.
As it was discussed during the study day, trend changes in energy demand do not happen overnight: the abundance of fossil fuel reserves and gas in many countries of the MENA region together with the already existing infrastructure settles the ground for no changes to take place imminently. Quite on the contrary, even if new sources of energy could be explored, nothing indicates that this will take place in the near future. Besides, deep changes in consumption patterns can take decades before this translates into a turning point.

**North Africa and counterintuitive perceptions**

Perceptions regarding energy trends in North Africa are not as easy to decode as one may think. Two examples that underpin this ascertained were explained in detail during the study day. On the one hand, disregarding the stability of the country, Algeria has never failed to satisfy its contracts and commitments; however, as internal politics are more important than international relations to the gas industry, extended mediocrity in its institutions could end up affecting the country’s energy policies.

On the other hand, Libya, towards which the Russian strategy revolves primarily around the opening of a new market and extending its influence to the southern part of the Mediterranean with the idea of having another port in it, together with the difficulties of understanding and predicting not only the production capacity due to the open conflict taking place in the country, but also the direction of the different exports trends having into account splitting of several energy export related institutions.

**The importance of winds from the east**

Gulf states have understood that the West is not the most important market and have already embraced strategies that take very much into account the fact that in this multipolar world the United States is no longer the sole dominant power. In fact, the energetic stability of the East will be at stake if tensions rise and/or the region enters a turmoil situation. The consequences of this, according to one of the panelists, will be immediate in several of the biggest energy importers in the East.

Even if China has experienced a great evolution in the security field and it has fostered its relations with the Gulf, its interference capacities are not even close so as to affect the Gulf-U.S. relations. However, this threat could well evolve in the medium term from asymmetrical to conventional with China challenging U.S. dominance in the region. Should this happen it will surely have impact on energy security worldwide.

**Demystifying the impact of disruptions and centering the focus**

According to the contribution of one of the panelists, the recent attack to the oil processing facilities at Abqaiq and Khurais in eastern Saudi Arabia cutting the countries oil production by about half –representing about 5% of global oil production– ended up causing very little destabilization of global financial markets, which shows a great and unexpected degree of resilience. This points to the need of pursuing further research aiming at redefining the possible and foreseeable impact of such attacks.

While focus regarding geostrategic energy disruptions has been put, among others, on Iran and non-state violent actors, the near-peer power struggle has occupied the global theatre with China and Russia pushing ahead to assert their influence and filling the rhetoric vacuum left by the United States.

**Illusory diversification and dependence**

Not only the energy mix in the Middle East is very little diversified, still relying mostly on oil and gas, but also the economies of the vast majority of its countries are heavily dependent on fossil fuels. In fact, it is the least diverse region in the world when it comes to energy. Diversification was discussed throughout all the study day as a feature closely linked to security and resilience regarding energy.
It is also very important to stress that several of the countries referred to as part of the MENA region are more dependent on energy exports than several of their clients are on importing.

**The restrictions of unrealistic ambitions in energy transition**

While oil and gas remain dominant and short and mid-term perspectives do not outline great changes, the actual wave of energy transition doesn’t seem to have a say, particularly in the Middle East.

Setting heterogeneous targets conditioned by economic growth and radiating uncontrolled ambition while drafting energy transition strategies for the next decades while starting from a very little diversified energy sector makes commitments likely unattainable or even unfeasible.

**Renewable energy: future potential, yet unexploited**

Several panelists agreed during their lectures that a new element to be taken into account is the untapped potential of renewable energies in a context of lower technological costs for renewables, and their potential role in securing energy supply. Both the Middle East and North Africa have a great wind and solar energy potential: fostering this technology not only will reduce energy dependence, therefore diversifying the energy mix, the sector could mean a significant rise in job creation, a matter of great importance for the youth particularly in North African countries.

However, the share of renewable energy use in the region is not progressing at a fast pace. In fact, the use of renewable energy in the region is below the world’s average. To take off, the sector will need a complete and understandable regulatory framework integrated in long term national energy strategies aiming at fostering domestic socioeconomic development.

**Points of Action for NATO**

Throughout the day, even if sometimes succinctly, several suggestions were made regarding possible actions NATO could undertake or adopt regarding its strategy on energy security:

- **Readiness and adaptation** are to be seen and therefore developed as key characteristics of NATO strategy regarding energy security in the region, and this principally due to the wide variety of threats and the difficulties linked to the close monitoring and evaluation of its evolution.

- **Improving situational awareness** and its broader implications through strategic intelligence is essential in order to gain an advantageous position from which to make better decisions.

- Study and research the **future implications** of the East becoming not only the biggest consumer, but also its rising influence in the region.

- **Invest in analysis**: as changes in energy trends take time to be established the possibility to develop different in-depth strategies shouldn’t be underestimated. Although NATO is not an energy institution, events in this field affect the international security scenario, and therefore the security interests of the Allies.

- **Reassess and reevaluate** the importance and implications of Russia and China in the field of energy as both countries may play a more important and at the same time a different than expected role compared to other fields. Furthermore, it would be interesting to analyze the different approach they adopt depending on the target country.
- There is not a one strategy fits all. The energy sector does not work in the same way in the Middle East as in North Africa, neither the different countries have the same characteristics or shared automatisms; well on the contrary, sometimes they even have competing interests.