

Policy Brief

Europe's strategic interest in completing the Nigeria-Morocco Gas Pipeline

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This Policy Brief addresses the question of Europe's interest in the Nigeria-Morocco Gas Pipeline project. The paper advances six arguments to support this interest and its relevance. 1) The project effectively diversifies European gas resources and provide greater scope for action. 2) Building the pipeline helps create a new generation of measures to curb the asymmetric risks Europe faces. 3) The project mitigates the risk of replacing European dependence on Russian gas with another dependence on unconventional energy sources with hazardous climatic consequences. 4) It also prevents the emergence of a strong European dependence on Algerian gas. 5) It enables Europe to rebalance its strategic direction from an unproductive horizontal model and towards a vertical model that leverages its influence. 6) Finally, the project stimulates West African integration, which in turn would constitute a vast and valuable consumer market for European economies.

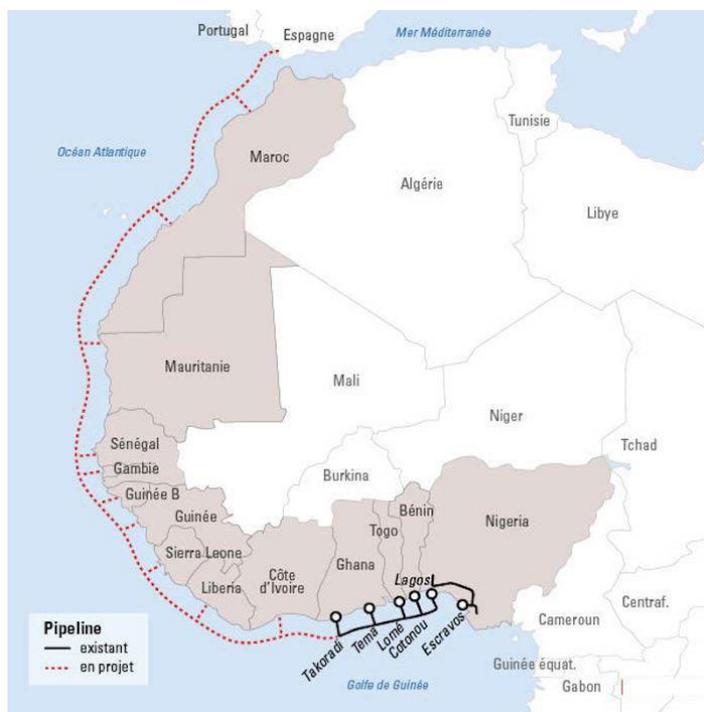
Introduction

The 5,000 km Nigeria-Morocco gas pipeline would funnel gas from the fields of the Gulf of Guinea to Morocco's Mediterranean coast, crossing through as many as eleven West African countries. The prospect of a deep and complex energy crisis currently looms over Europe. Russia has halted both the Nord Stream 1 and Nord Stream 2 gas pipe-lines, which carry the bulk of Russian gas supplies to Europe.

These moments, termed by geo-political scientist François Thual as "breakdowns in history"¹ are as much challenge as opportunity owing to the geopolitical cracks they induce. They confront global actors with the imperative of shifting from traditional strategic thought patterns. With the aim of better adapting to a world in perpetual transformation.

Originally launched in 2016 in Abuja, Nigeria, under the patronage of His Majesty King Mohammed VI and Nigerian President Muhammadu Buhari, the project hit an advanced milestone with the September 15, 2022 signing of a Memorandum of Understanding between the Economic Community of West African States (ECOWAS), the Federal Republic of Nigeria and the Kingdom of Morocco. In a June 2022 tweet, Nigeria's President called on Europeans and Brits "to support the Nigeria-Morocco Gas Pipeline to achieve energy security for the countries of Africa and Europe". The project aims to bring natural gas resources from Nigeria to Morocco through eleven West African countries, and link up with the Maghreb Europe Pipeline across the Mediterranean to ultimately interconnect to the European energy.²

Map n°1 : Nigeria-Morocco Gas Pipeline Route³



1. François Thual, Méthodes de la géopolitique, Ellipses, 1996, p.119.

2. The Nigeria-Morocco Gas Pipeline Project associates the Mauritanian (SMH) and Senegalese (Petrosen) oil companies, and will supply landlocked Niger, Burkina Faso and Mali.

3. Map from www.challenge.ma

And yet, while a variety of stakeholders, including the OPEC Fund for International Development, Saudi Arabia by way of the Islamic Development Bank, and ECOWAS, are actively invested in the project,⁴ Europe has not, at least for the time being, been involved.

This Policy Brief outlines the strategic advantages for Europe in building the Nigeria-Morocco gas pipeline. The underlying vision is that African gas supplies would strengthen Europe's energy independence, which is essential for strategic autonomy. The preferred approach is to alter European paradigms that shape its relation with Africa, making the continent a partner and providing Europe with an opportunity for global strategic repositioning. A minimum six factors justify the strategic interest Europe should have in this project:

1. Diversification of Europe's gas supply sources: a prerequisite for the continent's energy autonomy

Europeans have long ignored the basic principle that "you should never put all your eggs in the same basket". A map of gas pipelines in Europe shows alarmingly excessive supply source concentration.

Europe's dependence on gas imports grew significantly with completion of both Nord Stream 1 and Nord Stream 2 megaprojects, that directly connect Russia to Germany via the Baltic Sea. Together, both structures can supply 110 billion m³ of gas to Germany, Europe's driving economic force. Other pipelines add to this concentration, including the 4,000 km Yamal-Europe pipeline, that connects Russia's Yamal Peninsula gas fields to Western Europe. Altogether, no less than 50% of European Union (EU) gas consumption originates from one single supply source. Obviously, this constitutes a serious geopolitical weapon that can and will be used against Europe in the event of strategic confrontation, e.g. the current situation in Ukraine.

It is therefore vital for Europe to diversify its gas imports. To avoid catastrophic impacts should supplies from any one provider run into difficulty. Furthermore, diversification is also required to mitigate the economic risk arising from potential abuse of monopoly or oligopoly positions by a dominant supplier.⁵ Europe currently appears to be looking eastward for new Asian suppliers, such as Azerbaijan.⁶ On July 18, 2022, European Commission President Ursula von der Leyen travelled to Azerbaijan to announce a new agreement doubling Azerbaijani gas imports. Africa, although a mere 14 km from Europe, remains insufficiently visible on European energy radars. And yet, Africa's gas resources are significant and the potential of onshore and offshore reserves holds great promise. The Nigeria-Morocco Gas Pipeline project would effectively contribute to the diversification of European gas resources and give Europe greater scope for action.

4. Nigeria-Morocco Pipeline Inches Toward Providing Gas to Europe, By William Clowes, <https://www.bloomberg.com/>, 15 septembre 2022.

5. Energy and Geopolitics, Per Högselius, Routledge, 2019, p.117.

6. Depuis novembre 2020, le Trans Adriatic Pipeline achemine en Europe le gaz en provenance d'Azerbaïdjan. Il dispose d'une capacité de 10 milliards de mètres cubes de gaz par an.

2. Addressing asymmetric threats through large-scale economic projects

The Mediterranean is the world's only liquid continent, a wise man once said. A semi-enclosed sea more akin to a large lake, the Mediterranean has always been a space of encounter and exchange. This is its inherent and unalterable nature. This also illustrates why the barriers erected to preserve Fortress Europe prove little effective and, above all, counterproductive with each passing day. European concerns are legitimate. Africa is itself a victim of Europe's difficulties with illegal immigration and insecurity. Populist currents and extreme factions are the sole beneficiaries of the situation, as evidenced by the historic breakthrough of the extreme right in Sweden's September 2022 elections.

Yet, while European concerns are easily grasped, the course of actions taken appears less than appropriate. Its main flaw lies in its focus on crisis symptoms from a purely unilateral perspective. Instead, the focus should be on the roots of the problems in a participatory and inclusive way. Contributing to the emergence of a prosperous Africa would almost automatically cut down illegal migration flows. Facilitating trade and cooperation in joint projects generating shared wealth between both two shores of the Mediterranean creates the conditions for retaining illegal migrants in Africa and helps stem the flows of people in "economic distress". Building the Nigeria-Morocco gas pipeline would contribute to creating a new generation of measures that curb the asymmetric threats Europe faces.

3. Preserving Europe's climate objectives: not substituting one short-term crisis for another long term one

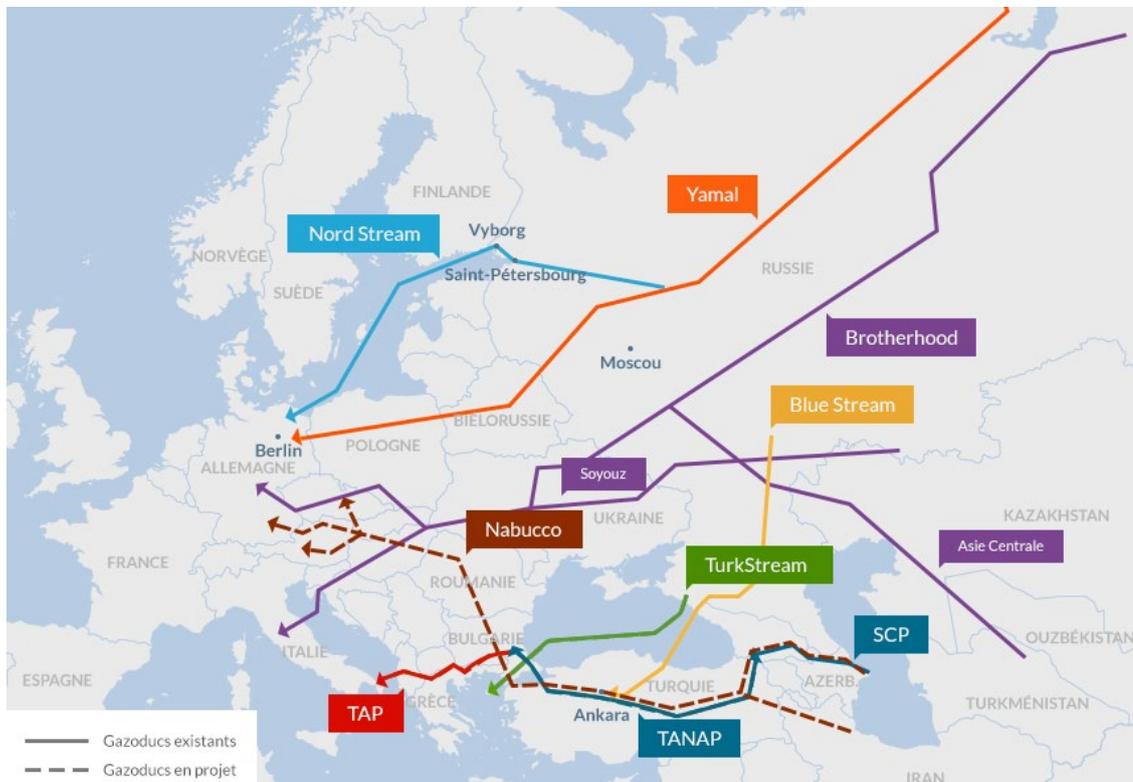
Climate change is now widely recognized. Its impact on environmental balances confirmed and especially devastating. In September 2022, a third of Pakistan territory experienced unprecedented floods.

In many ways, Europeans are a key constituent of the nascent climate consciousness. They strive to include climate-relevance to economic strategies and preserve environmental balances. The current energy crisis, however, threatens to undermine European gains in this area. Both alternatives to Russian gas, currently discussed in Europe, range from encouraging shale gas imports, on one hand, to reviving nuclear power, on the other. Both alternatives entail significant adverse consequences to the environment. To some extent, this means replacing Europe's dependence on Russian gas, which has serious geopolitical consequences, with a dependence on non-conventional energy sources which have dangerous climatic consequences. In this context, the Nigeria-Morocco gas pipeline, bringing natural gas from West Africa to Europe, has the merit of mitigating current solutions in Europe to replace Russian gas without sacrificing climatic balances. The goal is not to replace the two above mentioned sources, but rather reduce their impact through additional supply of conventional gas.

4. The strategic advantage of the Nigeria-Morocco gas pipeline over the Nigeria-Algeria alternative: not repeating the same mistakes

Restructuring Europe's energy market should be done on robust and sustainable foundations. This restructuring should above all not reproduce patterns of the past that have proved their undoing. Europe's current energy crisis is the direct result of excessive energy import concentration in the hands of a single supplier (see map 2). It would therefore be a strategic mistake for Europe to favor the emergence of domination by a single country, Algeria in this case, over gas imports from West Africa. As a matter of fact, the Trans-Sahara Gas Pipeline project, promoted by Algeria, which aims to bring Nigerian gas through Algeria before rerouting it to Europe, would expose Europe to additional risk and potential political shocks (see Map 3).

Map n°2 : Gas pipelines linking Europe, Russia and the Central Asian region



Source : <https://www.planete-energies.com/fr/medias/infographies/gazoducs-russie-cei-vers-l-europe>

Map n°3 : Three gas pipelines (excluding the Maghreb Europe Gas pipeline) connect to EU countries



Source : TV5 Monde

An Abuja-Algiers gas pipeline would provide a strategic opportunity to the regime in Algeria to add Nigerian and West African gas resources to its own energy resources in advancing its political agenda. And considering Algeria's strategic alliances, particularly in light of the deepening Algiers/Iran/Russia axis, the risk of Algeria's regime employing gas as a strategic weapon should not be discounted. Two recent moves illustrate Algiers' use of gas as a geopolitical weapon in this respect. First, in late 2021, Algeria shut down the Maghreb/European Gas Pipeline supplying Spain and Portugal with Algerian gas, in large part to protest agreements signed between Morocco, the United States and Israel. Then, in early 2022, Algeria moved to punish Madrid for its rapprochement with Rabat through a range of sanctions including reduced gas deliveries. On top of all these considerations, the insecurity element along the proposed Algerian gas pipeline route also warrants concern.

European support for the Nigeria-Morocco gas pipeline neutralizes the Nigeria-Algiers gas pipeline project, which would exacerbate Europe's energy dependency rather than reduce it.

5. Repositioning Africa/Europe in a fast-changing world: A vertical perspective over a horizontal one

Europe would gain by rebalancing its strategic direction from a horizontal model, which is hardly productive, to a truly vertical model, which leverages its influence.

Relations between Europe and Africa can easily be characterized as "a big mess". Geographical, historical and economic factors predestine both continents to strong cooperation. Furthermore, of all major global players, Europe is probably the one that is least "political" in its geography. It is the power cluster that trades and invests the least in its immediate vicinity. Economic transactions between the United States and North and South America are in sharp contrast to Europe's transactions with Africa. The same is true of China's transactions with Asian countries.

This vertical projection momentum in America and Asia grows deeper despite the historic and strategic dissimilarities among countries of these areas. In 2021, China successfully established the largest free trade area in the world (the Regional Economic Comprehensive Agreement), covering 15 Asian countries, including Japan, South Korea, New Zealand and Australia.

Europe, on the other hand, is stuck in a horizontal model that focuses on strengthening transatlantic and Indo-Pacific relations to the detriment of links with the Mediterranean and Africa. On this point, the Nigeria-Morocco gas pipeline project is an opportunity to establish a new vertical dynamic. It would offer Europe additional drivers to attain ambitions for a geopolitical Europe endowed with strategic autonomy.

6. Supporting West African Economic Integration: The Opportunity of a 400+ Million Consumer Market

The world is reshaping along regional dynamics in a context of global economic rivalry. The quest for additional market share for national exports has by and large replaced warlike adventures for additional swaths of territory. In such a context, regional economic integration is proving increasingly essential. It also enables valuable synergies between economic objectives and security imperatives.

In an African context, this integration process, whether at continental level, under the aegis of the African Union, or at regional level, led by Economic Integration Communities, has yet to achieve its intended objectives. There is, in fact, a considerable gap between solid institutional and normative achievements and tangible results in terms of trade volumes and number of joint projects.

Weak regional economic integration in Africa negatively impacts not only African but also European economies. Today, the West African market accounts for over 400 million consumers, and should reach 600 million by 2050 according to United Nations projections. European investment in joint projects in West Africa would create more economic opportunity for European companies. In this context, European support for the Nigeria-Morocco gas pipeline project, crossing eleven West African countries and involving fifteen of them, would provide momentum to the ongoing economic integration in West Africa, which would in turn constitute a vast consumer market for European economies. Ultimately, this could foster the emergence of a vast area of trade and prosperity that would allow the Europe/Africa vertical to become a balancing force in a world shaped by strategic conflict, pandemics and climate threats.⁷

7. "Toward a Second Global Cold War," Jamal Machrouh, Policy Center for the New South publication, June 2020.

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About the Policy Center for the New South

The Policy Center for the New South (PCNS) is a Moroccan think tank aiming to contribute to the improvement of economic and social public policies that challenge Morocco and the rest of Africa as integral parts of the global South.

The PCNS pleads for an open, accountable and enterprising "new South" that defines its own narratives and mental maps around the Mediterranean and South Atlantic basins, as part of a forward-looking relationship with the rest of the world. Through its analytical endeavours, the think tank aims to support the development of public policies in Africa and to give the floor to experts from the South. This stance is focused on dialogue and partnership, and aims to cultivate African expertise and excellence needed for the accurate analysis of African and global challenges and the suggestion of appropriate solutions.

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The views expressed in this publication are those of the author.

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