



The 4th Meeting

Powering the Transition

Strategic Interconnections for a Resilient and Sustainable Mediterranean Energy Future

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Organized by the Policy Center for the New South & Konrad Adenauer Stiftung – PolDiMed

CONTEXT

The Mediterranean stands at the intersection of a global energy transition marked by geopolitical tensions, asymmetrical development paths, and unprecedented innovation opportunities. Despite abundant renewable resources and strong potential for regional interconnection, fragmented governance and investment constraints continue to hinder progress.



KEY TRENDS

- 1** The expansion of cross-border infrastructure and energy cooperation remains significantly constrained by ongoing regional instability, geopolitical tensions, and fragmented regulatory frameworks.
- 2** A widening gap is emerging, as Europe accelerates its energy transition while Southern Mediterranean countries struggle to keep pace. This dynamic increases the risk of a two-speed transition—between a decarbonized Europe and neighboring states still dependent on outdated systems.
- 3** The combination of high capital costs and a scarcity of bankable projects—exacerbated by the weak regulatory frameworks and ongoing political uncertainty—continues to deter the scale of investment needed to unlock the region's full energy potential.
- 4** Private-sector collaboration is proving more effective than intergovernmental efforts in advancing energy-related projects and partnerships across the Mediterranean.
- 5** The region's vast renewable energy potential—estimated at 4.5 TW, of which 1 TW feasible by 2030 according to the Teramed Initiative—continues to fuel momentum around green hydrogen as a transformative connector between the northern and southern shores of the Mediterranean. However, progress remains fragmented and lacks effective coordination.
- 6** Energy diversification and interconnection have become strategic imperatives in the wake of recent crises. Pronounced seasonal demand variations further highlight the urgency of deepening regional cooperation.

RECOMMENDATIONS

1. Regulatory harmonization:

Establish a shared framework for cross-border energy projects based on common standards. Empower a suitable regional body with a structured mandate to issue regulatory guidance that integrates technical, policy, and social dimensions. To support deeper regional integration, regulatory metrics and methodologies should be harmonized to ensure consistency, transparency, and interoperability across the energy sector.

2. Investment mobilization:

Deploy blended finance mechanisms and targeted public-private partnerships to de-risk and accelerate clean energy projects across the Mediterranean and catalyze long-term infrastructure investment.

3. Energy ecosystems development:

Promote the creation of energy ecosystems that combine local manufacturing, technological innovation, and supply chain integration within global and regional value chains. These ecosystems can unlock significant opportunities and ensure long-term sustainability to infrastructure investment. Particular attention should be given to synergies with related industries such as desalination and battery technologies. Encourage the development of regional hubs and cross-border technological cooperation in the renewable energy sector by connecting research institutions, startups, and industrial stakeholders to support innovation and accelerate large-scale deployment.

4. Energy and Climate Change Compact:

Launch a comprehensive regional compact involving all Mediterranean countries to coordinate efforts on energy transition and climate resilience, and to align national strategies within a coherent regional vision. This initiative

should also take into account the presence of foreign actors operating across the Mediterranean space. Its scope would encompass key areas such as energy trade, energy efficiency, energy security, dispute settlement, and energy transit.

5. Hydrogen Innovation Alliance:

Accelerate the development and deployment of clean hydrogen by harmonizing standards and collaboratively advancing cutting-edge technologies across the region through coordinated strategies. To facilitate implementation, a unified hydrogen market requires the development of certification standards that are recognized and accepted throughout the Mediterranean region.

6. Regional Investment Fund for Cross-Border Infrastructure:

Catalyze essential regional development, through the establishment of a dedicated regional vehicle specifically designed to finance large-scale cross-border infrastructure projects leveraging both public and private capital.

7. Centralized Renewables Auctions:

Establish a regional auction mechanism to accelerate the scale-up of renewable energy capacity and procure 1 terawatt of renewables across the region by the ambitious target of 2030. This approach will enhance market certainty and strengthen investor confidence.

8. Standardized Public-Private Partnership Model:

Adopt standardized Public-Private Partnership (PPP) models and bankable and transparent offtake agreements to ensure commercial viability and accelerate project delivery.

9. Enhanced Academic Cooperation:

Strengthening academic cooperation and fostering collaborative research initiatives within the energy sector to build a skilled workforce and drive innovation. Enhance cross-border regulatory training, moving from fragmented workshops to sustained capacity-building programs.

10. Energy diplomacy and regional political leadership:

Strengthen regional energy diplomacy and strategic leadership by consolidating multilateral and inclusive platforms for dialogue. Promote knowledge-driven advocacy, with think tanks and expert networks serving as strategic bridges between private sector, policymakers, and civil society- anchoring policy in shared knowledge and trust.

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