

Dear Readers,

The Middle East & North Africa

Over the past few months we have witnessed a series of unprecedented popular protests and political changes in the Mediterranean Region. While causes are manifold, the large

scale expansion of renewable energy might play a prominent role in addressing some of the most pressing issues at hand: high rates of unemployment and secure supply of energy. Significant increase in population, rapid urbanization and economic growth are putting severe pressure on existing energy systems. However, while energy demand is soaring with growth rates of 4-7% per year, the region's vast potentials of renewable energy remain largely untapped.

The economic significance of renewable energy is multifaceted. Energy is the precondition for economic development as a catalyst to create jobs, innovation and growth. Installation, operation and maintenance of modern energy infrastructure have proved a sustainable positive stimulus to employment, attract investments and offer local manufacturing potential. The German renewable energy sector with its 340.000 jobs (2009) is a tangible example of these beneficial effects

Countries with significant fossil resources can shift oil and gas from the power sector to higher value-added uses and exports. For those without or dwindling fossil reserves renewable energy offers an opportunity to diminish energy import dependence as we can see in the case of Morocco. Excerpts from a speech by Mrs. Amina Benkhadra, Moroccan Minister of Energy, Mines, Water and Environment printed in this issue emphasize the momentum of green energy.

The region is well placed to benefit from a massive scale-up of renewable energy and the development of cross-border energy systems and markets. The deployment of clean technologies fosters regional cooperation, thus contributing to overall political stability and socio-economic prosperity.

The good news is that renewable energy technologies are available to make energy supply more sustainable. However, for large scale application and a considerable decrease in prices for relatively new technologies (e.g. concentrating solar thermal power) framework conditions have to set a level playing field for renewable energy sources, support mechanisms for the investment in new infrastructures have to be effective, and capacities of institutions, companies and people need to fit to the new tasks.

One of the pivotal challenges of the 21st century will be to develop sustainable energy infrastructures that can guarantee secure supply, social and economic development and reduce greenhouse gas emissions. GIZ, looking back on more than 30 years of experience in the Middle East and North Africa, supports the required processes of change. Some of our ongoing projects are presented in this newsletter.

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(Head of GIZ energy and transport)

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Guest contribution – The Union for the Mediterranean The Mediterranean Solar Plan: A Multilateral Policy Approach toward Sustainable Energy Solutions for the Euro-Mediterranean Area



Dr Steffen Erdle, Energy Division,
Union for the Mediterranean (UfM)
Secretariat

The launch of the Mediterranean Solar Plan (MSP) at the founding summit of the Union for the Mediterranean (UfM) in 2008 was a major step for regional energy co-operation. The MSP is expected to further boost the development and deployment of renewable energy and energy efficiency ("R3E") technologies in the 43 UfM member states.

The UfM Secretariat in Barcelona will play an important role in this context. The core task of the energy division is to elaborate, together with the member states and the European Commission, an MSP Master Plan that will define in (more) detail how to create the necessary framework conditions for a large-scale unfolding of 'R3E' technologies in the area. The main issues covered will include the necessary changes at the regulatory level, the extension and modernisation of energy infrastructures, as well as the identification and dissemination of international "best practices", e.g. with regard to project financing, technical support, know-how transfer, and capacity development.

The MSP Master Plan will not represent "just another study", but constitute a joint policy roadmap that will help member states to gain a shared understanding of the challenges ahead and provide them with a common sense of purpose. The UfM Secretariat stands ready to act as facilitator of this process, building to the extent possible on existing platforms of cooperation. A key goal will be to identify ways of how to cluster local value chains around "R3E" technologies and use them as a driver for development. It is clear that these concerns have become even more important due to the political upheavals in the Arab World, and that the MSP is called upon to provide solutions in this regard.

For more information please visit www.ufmsecretariat.org.

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Euro-Mediterranean energy cooperation Supporting the Mediterranean Solar Plan

The Mediterranean Solar Plan (MSP) aims to set the political framework for a sustainable energy supply in the member states of the Union for the Mediterranean (UfM) both with regard to local consumption and electricity exports to other countries. The German Ministry for the Environment, Nature Conservation and Nuclear Safety (BMU) supports the MSP with the objective of creating a win-win situation for Southern Mediterranean and EU countries in the long term: according to its baseline scenario Germany can reach a share of at least 80% of renewables in its electricity mix by 2050 with the help of solar electricity imports. The Southern Mediterranean countries themselves need renewable energy sources and energy efficiency measures to cover their quickly growing energy demand. The Euro-Mediterranean energy cooperation will increase energy security, reduce green house gas emissions and open opportunities for the local development of renewable energy technologies.

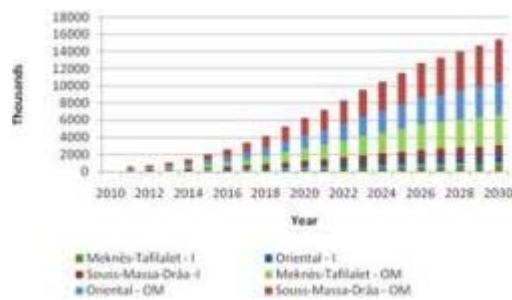
The BMU funds two projects to accompany and facilitate this process. The first project "Support to the Mediterranean Solar Plan" (2010-2013) supports the work of the energy division of the Secretariat of the Union for the Mediterranean. It will also create an MSP network among concerned actors in Germany, Southern Mediterranean and other EU countries, e.g. by the secondment of experts whose tasks are to foster strategic discussions, knowledge exchange and the development of capacities. The second project on "MSP and technology cooperation" (2011-2014) looks into opportunities of how to increase the renewable share in the energy mix of Southern Mediterranean countries and assesses chances to increase the value added in the region through the large scale deployment of renewable energy technologies.

Contact: Mohamed.El-Khawad@giz.de, Project Director

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GIZ Morocco

Illustrating paths towards increasing local content and employment through PV



On behalf of the Moroccan Ministry of Energy, the GIZ project "Promotion of Renewable Energy and Energy Efficiency" developed a promotion scheme for PV that would increase its market share. (Figure: Estimated number of

jobs created in PV sector (Installation, Operation & Maintenance). In this regard, a GIZ study shows that boosting the share of PV electricity using a net-metering approach would be very cost-effective and will yield huge benefits to Moroccan society and economy. Through a meter which is able to turn backwards net metering allows customers to use their own PV electricity generation for personal consumption and thus decrease their electricity bill.

Among the results:

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- Compared to all household tariffs, today in Morocco, PV technology used on a net metering approach has reached grid parity (LV + MV clients)
- In principle no subsidies are therefore needed for market take-off
- The increasing electricity demand in Morocco can partly be covered through decentralized PV potential
- By the end of 2030 a market volume of 2,394 Mio. Euro could be reached by exploiting the national PV potential to supply all LV and MV clients
- More than 15.000 jobs could be created in 3 regions through PV development

GIZ – Tunisia

Promotion of solar water heaters: significant effects on revenue and job creation



The national program for the promotion of solar water heaters (SWH) in Tunisia (PROSOL) was initiated in 2005 by the Tunisian National Energy Agency (ANME). By offering a 20% subsidy of investment costs, this program aims to boost

the market for residential SWH installations.

GIZ through its project "Promotion of Renewable Energies and Energy Efficiency" (ER2E) has supported the implementation of PROSOL since its beginning by providing technical and organizational advice to ANME. Several training sessions for ANME staff as well as for engineers and technicians from the private sector have been organized. In 2010, a national certification system (Qualisol) for SWH installers was established with the assistance of GIZ.

Since the beginning of PROSOL, the market for residential SWH has shown a strong expansion from a total installed capacity of 123.000 m² in 2004 to more than 480.000 m² by the end of 2010. Since 2008, large solar thermal systems are also promoted by PROSOL.

PROSOL also had significant effects on revenue and job creation. At the end of 2010, around 46 distributors and 1.100 installation companies were active in the Tunisian SWH market. An estimated number of 5.000 jobs have been created. Several Tunisian companies are now locally producing and exporting SWH or components. In this way, PROSOL also contributes to reducing the high unemployment rate in Tunisia.

For more information please visit Agence Nationale pour la Maîtrise de l'Énergie (www.anme.nat.tn) or GIZ (www.gtz.de/...).

(Photo: GTZ / Berno Buff)

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GIZ Egypt – Egyptian German Joint Committee for Renewable Energy, Energy Efficiency and Environmental Protection (JCEE) Involving Civil Society in the Energy Policy Dialogue in Egypt



Long before the post-revolutionary "civil society drive" hit the MENA region, the foresighted Egyptian Electricity Regulatory Agency advocated that a national energy policy dialogue should not only involve governmental institutions and concerned industries but also the civil society. In absence of a corresponding and competent organization representing individual energy consumers in the Egyptian NGO landscape, the Egyptian German Joint Committee for Renewable Energy, Energy Efficiency and Environmental Protection, a Technical Cooperation Program supported by the German Federal Ministry for

Economic Cooperation and Development (BMZ), was requested last year to facilitate the creation of such an NGO.

Building upon the German experience, the "Bund der Energieverbraucher e.V"

supported five NGOs from various thematic backgrounds (incl. youth, environment and energy) in the founding process and the start-up phase of the "Consumer and Energy Organization (CEO)". Demonstrating its added value to the energy sector and the Egyptian society as such, the CEO will play at first a major role in implementing an "energy saving" media campaign (PPP), highlighting the responsibility of each and every citizen to use scarce national resources efficiently. The Ministry of Electricity and Energy has already embraced the CEO as a promising and effective communication channel with civil society and as a cooperative partner in the sensitive energy policy dialogue.

For more information please visit www.jcee-eg.net.

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Germany's International Climate Initiative Turkish-German Project transforms manure into energy

Animal waste from cattle breeding and agro industry wastewater are the source of considerable greenhouse gas emissions and massive water pollution in Turkey. GIZ in cooperation with the German Federal Ministry for the Environment and the Turkish Ministries of Environment and Agriculture takes up the challenge: A holistic concept around the production of biogas shall promote renewable energy potential, protect the environment and modernize agricultural production systems.

By using manure for energy production, animal waste is no longer dumped into the rivers. At the same time, greenhouse gas emissions are significantly reduced. The Turkish-German Biogas Project supports the Turkish decision makers in creating an encouraging legal and institutional framework for biogas production as well as a stricter environmental legislation. On local level, GIZ is currently analysing the regional potentials for the pilot biogas plants.

"Biogas production offers great opportunities for modernization of agriculture and local economic development", GIZ Project Director Dr Thomas Breuer affirms. "For example, manure collection systems will require modern barns." As feasibility studies have shown, local plant breeders mainly use chemical fertilizers. Replacing these with organic fertilizers from biogas digestates is also part of GIZ's holistic approach.

For more information please contact Dr Thomas Breuer (thomas.breuer@giz.de).

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GIZ Jordan Energy Efficiency in Jordan's Water Sector: A Triple Win Approach



Secure supply of energy, reliable water supply and fighting against climate change are closely interlinked in Jordan, since the Water Authority of Jordan (WAJ) uses about 15% of Jordan's entire electricity production. Therefore the programme "Improvement of

Energy Efficiency of WAJ (IEE)", funded by the German Federal Ministry for the Environment (BMU) and implemented by WAJ and GIZ, tackles the electricity use of water pumps. Measures undertaken in three pilot pumping stations reduced the energy consumption by up to 60%, the annual CO₂ emissions by almost 2,000 t and the annual costs for WAJ by approx. 150,000

Euro.

The programme however goes beyond hardware replacement: through the introduction of performance-based energy contracting, local and international companies invest in pumping stations and operate them, thus achieving a Triple Win: long-term cost-savings, reduction of CO2-emissions and extending the service-chain of the private sector. GIZ supported a Pilot-PPP (Public-Private Partnership) project in one pumping station, in order to identify the risks of this innovative approach and develop measures for appropriate risk mitigation. Due to the success of the programme, private sector and other donors now provide additional investments for WAJ pumping stations, which helps to replicate the approach and thus multiply the impacts.

Photo: Visit of the Secretary General of WAJ at the PPP pumping station

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GIZ – Algeria, Morocco & Tunisia Energy efficiency in the construction sector



Since 2010, GIZ is implementing the regional programme "Capacity Building for Energy Efficiency in the Construction Sector" in Algeria, Morocco, and Tunisia. Partner institutions are from the TVET, energy, and construction

sectors with a mandate for initial and further training or other forms of disseminating knowledge on this specific topic. Among them are the TVET organisations OFPPT (Morocco) and CENAFFIF (Tunisia), the energy agencies in the three countries (APRUE, ADEREE, ANME), and construction companies like COSIDER in Algeria.

GIZ provides a wide range of capacity building measures – short- and long-term trainings, workshops, study visits or conferences – to support participants and partners in developing, implementing and monitoring training offers for various target groups, as well as conducting sensitization programmes for the public or building up energy consulting competencies. At the same time, a regional network of expertise has been initiated. The first cycle of short-term trainings on "building envelope" has been completed and a first long-term training was launched recently. A second training cycle on "energy efficient building equipment" will follow by the end of 2011. In parallel, the partner institutions initiated their first dissemination activities. As a cross-border event a regional seminar on energy efficiency in construction is planned for early 2012 in Morocco.

Sabine Hartig

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GIZ in the MENA-region

Supporting renewable energy and energy efficiency on the regional level



GIZ supports various regional initiatives in the Mediterranean region, aiming at promoting the deployment of renewable energy technologies and energy efficiency measures. A regional approach both in terms of enhancing cross border knowledge

diffusion and joint infrastructure projects (e.g. transmission networks) complements national initiatives.

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- RCREEE – Regional Center for Renewable Energy and Energy Efficiency is an independent regional think tank based in Cairo which is dedicated to the promotion of renewable energies (RE) and energy efficiency (EE). RCREEE formulates and disseminates policies in support of RE and EE and provides a platform for the regional exchange on policy issues and technological questions. In addition, RCREEE encourages the participation of the private sector in order to promote the growth of a regional industry of RE and EE. GIZ, on behalf of the Federal Ministry for Economic Cooperation and Development (BMZ) supports the set up of RCREEE through secondment of a long term expert.

www.rcreee.org

- MED-EMIP – Euro-Mediterranean Energy Market Integration Project is expected to be the catalyst of the reinforcement of EU-Mediterranean energy cooperation, with particular emphasis on energy security and sustainability, through enhanced dialogue and information exchange. MED-EMIP, an EU-funded initiative, in cooperation with the Regional Center for Renewable Energy and Energy Efficiency (RCREEE) in Cairo, support regional activities to: Stimulate North-South and South-South exchange of experience; Promote shifts in the energy mix towards sustainable and clean energy; Stimulate market development for EE and RE; Speed up the creation of an integrated energy market by supporting the increased consistency, harmonization and convergence of national energy policies and frameworks.

www.medemip.eu

- MED-ENEC – Energy Efficiency in the Construction Sector in the Mediterranean: In order to reduce both energy supply requirements and the ever-growing impact on the environment of inefficient buildings and installations, the MED-ENEC Project on Energy Efficiency in the Construction Sector in the Mediterranean, an EU-funded initiative, is aiming to boost Energy Efficiency measures (EE) and the use of Renewable Energies (RE) in the construction sector.

www.med-enec.com

Energy Cooperation between MENA and Europe Implementation of Art. 9 of EU Directive 2009 on renewable Energy

The 2010 German energy concept is basically still in force. The objectives to strengthening co-operation with the Mediterranean region, the need to develop an energy partnership and to import solar electricity from North Africa remain

policy objectives. German energy policy after Fukushima and the planned phase out of nuclear energy being presently debated in Parliament is based on the original 2010 concept, yet it focuses on certain issues and aims to accelerate their implementation. These issues are e.g. the massive investments in national grid extension as well as the promotion of offshore wind projects. Further, Germany continues to plan to introduce a mechanism to finance the import of solar electricity under Art.9 of the European Union Directive of 2009 on renewable energy. Here close co-operation with European Union member states as France and Spain is indispensable as well as with the Commission. The MENA focus lies presently on the Maghreb countries due to the fact that Morocco is connected to the European grid with Spain and Tunisia is progressing on plans for a sea cable to Italy. The exchange with the other North African countries takes place under the umbrella the development of the Mediterranean Solar Plan being developed under the auspices of the Union for the Mediterranean.

The implementation of Art. 9. of the EU Directive of 2009 through the EU member states is important because it represents a complementary financing to the means that the North African countries themselves are investing and to the ODA relevant funds coming from e.g. the World Bank Clean Technology Fund CTF. On the technology side Germany focuses on Concentrated Solar Power (CSP) because of its' storage capacity and the possibility to continue to provide renewable electricity even after sun set.

Mohamed El-Khawad,
Head, Project "Support to the Mediterranean Solar Plan", regional project "Mediterranean Solar Plan – Technology Cooperation" commissioned by the German Federal Ministry of Environment (BMU).

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Morocco – Speech by Mrs Amina Benkhadra, Minister of Energy, Mines, Water and Environment
Green energy, a mementum for Morocco



[Mrs Amina Benkhadra, Minister of Energy, Mines, Water and Environment addresses the National Energy Convention in Morocco, held under the central theme "Green energy, a mementum for Morocco" and presided by King Mohammed VI.]

I am granted the distinct privilege to present before your August Person a review of what has been achieved and what is to be completed in regard to the programmes enrolled in the National Energy Strategy [adopted in March 2009]. (...)

The New Energy Strategy

(...) In comparison with their current level, primary energy and electricity consumption will double from now to 2020, whilst they will be respectively three times and four times higher in 2030. The challenge we are faced with, is to meet this increasing demand. The new energy strategy aims at achieving the main objectives: security of supply in various types of energy; their availability as well as their accessibility at fair affordable prices; rationization of their use and preservation of the environment.

To attain these goals, the following strategic orientations are adopted: The implementation of a diversified and optimized energy mix, especially meant to generate electricity; The development in large-scale of the huge domestic resources of renewable energy, especially solar and wind power; The

promotion of energy efficiency, erected as a national priority; The mobilization of the other domestic energy resources; The integration into the Euro-Mediterranean and African regional energy system; The early application of environment preservation devices into all activities.

This strategy, broken down into short-medium and long term action plans is on fast track. Its implementation already yields tangible results. (...)

Achievements

Short-term projects 2008-2012

In the framework of the National Plan of Priority Actions, which involves the reinforcement of electric supply to achieve balance with demand, and the establishment of the first measures of energy efficiency, several achievements have been carried out. Actually, 1084 MW of new power generation planned in the electrical emergency programme are already, or will be implemented before the end of the year 2012.

Your Majesty has presided the inauguration of many of these installations which concern: The thermo-solar integrated combined-cycle plant of Ain Beni Mathar, of a total power of 472 MW, 20 MW of which are generated by the solar component. The installation, which is the first of its kind in the MENA region; The wind farm of Tanger1 of 140 MW, the biggest in Africa and the Middle East; The hydroelectric complex of Tanafit-El Borj of 40 MW; The gas turbine plant of Mohammedia, composed of three installments of 100 MW each; The Tan Tan Diesel Groups of 116 MW; The extension of the Diesel Plant of Dakhla of 16 MW.

This programme has been also reinforced to meet the demand and to enlarge the electric reserve margin by planning the commissioning, from now to 2012, of the following power plants: the Kenitra Gas turbine of 300 MW; the Tarfaya wind farm of 300 MW, to be realized as an IPP; the Agadir Diesel Group of 72 MW

These installations are completed with the renovation of the coal-fired power plants in Mohammedia and Jerada, six gas turbines and 26 hydroelectric dams totalizing 2340 MW.

The balance between supply and demand has been strengthened thanks also to the addition of new 2100 km wirelines to the transmission network, together with the optimization of the management of the interconnections with Spain and Algeria and the modernization of the national dispatching. Thus from 2008 to 2012, an additional electric power of 1756 MW as well as different electrical equipments will have been set up, costing an investment of more than 24 Billion Dirhams.

Between 2013 and 2015, new power plants will be put on production: Coal-fired power plants including the extension of the Jorf Lasfar plant of 2x350 MW, where work has already begun, and the building of the Safi plant of 2x 660 MW. The construction of these projects have been allotted renown international operators; The Ouarzazate solar plant, of 500 MW, which is the first project to be achieved in the framework of the Moroccan Solar Programme; different wind farms of 570 MW, which fit into the Moroccan Wind Power Programme, 450 MW of which will be ensured by the private sector; the hydroelectric complex of El Menzel/Mdez and the Abdelmoumen PTS, for a total 550 MW.

These project will be accompanied by adding a third connection of 700 MW to the interconnection with Spain and reinforcing the transmission networks with 6470 km of supplementary new lines.

By the end of 2015, new electricity capacities of 3640 MW and other devices will be added at a total cost of nearly 73 Billion Dirhams. Concerning the Demand Side Management, many measures relative to energy efficiency, have been implemented. (...)

Despite the achieved advances, it is urgent that all concerned parties speed up the implementation of energy efficiency measures related to their respective sectors for a better use and saving of energy. (...)

The momentum of green energy

(...) By launching the grandiose solar and wind power programmes of 2000 MW each, which will be achieved by 2020, your Majesty has given an extraordinary impetus to the spreading of Green Energy in the Kingdom. The integrated solar programme plans to build five power plants, locates as follows: 500 MW in Ouarzazate to be operational by 2015; 400 MW in Ain Beni Mathar near Oujda; 500 MW in Sebkhah Tah; 500 MW in Fom El Oued; and 100 MW in Boujdour (...)

In this framework, 280 MW of wind power are already commissioned: 720 MW are in the process of being developed: (...)

Except the Tarfaya wind farm, which will be realized in the framework of an IPP concession, the other projects will be developed by the private sector and are due to be in production by the end of 2012.

1000 MW constitute an integrated project that will be exploited according to IPP regime comprising five wind parks. (...)

At the achievement of all these programmes in 2020, 42% of the global power capacity installed in Morocco will come from renewable sources.

As far as employment is concerned, according to a conservative scenario, the development of renewable energy and of energy efficiency plans will generate 50000 direct and permanent jobs by year 2020, 12000 of which in solar and wind energy fields.

At the legislative, regulatory and institutional levels, necessary reforms have been undertaken to speed up the implementation of renewable energy projects, in order to enable investing companies and operators to have a better visibility. (...)

The 13-09 law on renewable energy, highly liberal and attractive, offers genuine investment opportunities for the private sector. The latter can, without any power limitation, generate electricity from renewable sources. The generated electricity can be traded in the domestic market and/or exported through the access to both the national network and the interconnections. It is also possible for investors to benefit from the use of green electricity direct lines.

In sum, from 2008 to 2020: the total supplementary electric power capacity from all sources will reach 9246 MW; the total investment in the different electric and petroleum projects will be of about 200 billion dirhams. (...)

Under Your Enlightened Guidance, Green Energy opens new promising horizons for our country and for its sustainable development which will ensure prosperity for present and future generations.

[Exchange rate 1 EUR = 11.4 Dirhams]

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