

WHY IMEC NEEDS TO CHANGE COURSE IN THE EUROMED: TO INVEST IN THE TRUE DRIVERS OF PEACE AND ECONOMIC SECURITY

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Why IMEC Needs to Change Course in the EuroMed: To Invest in the True Drivers of Peace and Economic Security

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Abstract

The India-Middle East-Europe Economic Corridor (IMEC), is a geoeconomic project that propels infrastructure connectivity higher than ever on the geopolitical agenda of global powers. Its announcement at the 2023 G20 New Delhi Summit leaves no doubt: India is in the driving seat, and the starting point for a corridor connecting the East to the West. The Middle East takes the centre spot, critical but spanning a wide range of political and economic realities, from the Arabian Gulf to the Eastern Mediterranean. Europe and the European Union (EU)'s single market are the destination, as coveted by far-away economic partners. IMEC's global scale from Asia to Europe stops short of glossing over the challenging realities of the Euro-Mediterranean region. While plans for transport, trade, energy and digital connections are examined, conflicts and human rights violations escalate, inequalities widen, the impacts of climate change worsen, and inter-Mediterranean partnerships suffer from under-investment and political instrumentalisation.

Based on three scenarios sketching IMEC's uncertain future by 2040, this paper draws on findings that show urgency for the corridor's Euro-Mediterranean governance to change course. The first scenario of a "Profit-driven IMEC", designed and governed to prioritise secure supply chains above all other objectives, is the most likely future with one major caveat: it might not reach Europe at all. A corridor segment from India to the Arabian Gulf would be rooted in a much stronger geoeconomic and political partnership than a segment from the Middle East to Southern European shores. Even if "Profit-driven IMEC" eventually reaches Europe, its potential to aggravate regional conflicts and disparities across the Middle East would come with heavy costs for all involved.

The second scenario sketching a "Collaborative IMEC", centred around partners' commitment to the Middle East peace process as well as to sustainable connectivity as a driver for stability, appears more desirable and beneficial to Euro-Mediterranean economies. It is, however, the least likely scenario, as the political direction and foreign policy of most partners are incompatible with its realisation. Yet the costs of inaction remain high, as shown by the third scenario entitled "No IMEC". Without sound plans for peace and a political framework for broader Euro-Mediterranean cooperation, Southern and Eastern Mediterranean partners may be better off without IMEC – depriving Europe of the transport, digital and energy connections it is aiming for.

Less than a year after IMEC's global launch, more than eight months into the escalation of the conflict in Gaza into a plausible genocide or new Nakba, as well as a watershed moment for the international community, the outlined policy recommendations can be of immediate relevance to European policy-makers and their partners across the Mediterranean. They are as follows: 1) to raise awareness, among European partners, of the current design of IMEC as a strategic dead-end for EU economic security, and therefore detrimental to EU's highest political priority; 2) to commit to the Middle East peace process and diversify the IMEC route, with the understanding that there will be no IMEC without a just settlement following international law, and no sustainable connectivity without an IMEC route that includes connections to a future state of Palestine and other Mediterranean partners; and (3) to renew and broaden the Euro-Mediterranean partnership to offer a sound foundation for connectivity, one that takes into account Eastern Mediterranean partners' political economy while remaining grounded in a values-based approach.

Introduction

A controversial yet coveted corridor

Ambitious and political

The ambitious but controversial IMEC announced in September 2023 signalled a new era of EU assertiveness across continents, tying together its geostrategic interests from supply chain resilience to energy security, in line with its 2021 Global Gateway strategy. Behind the hand-

shakes and technicalities of investment agreements, connectivity engagement is deeply political. All the more so in the Euro-Mediterranean region, where geostrategic interests and conflicts clash and clatter against the backdrop of climate change and political upheaval. In fact, IMEC goes beyond the Euro-Mediterranean region, engaging global actors from multiple continents and aiming to reshape global supply chains, from trade to energy and digital flows.

Table 1. September 2023 IMEC Memorandum of Understanding signatories, as well as countries and territories on the predicted IMEC routes, as written and in order of the document

IMEC MoU signatories, as written (direct quotes) and in order	Countries and territories included in the IMEC route, as written in IMEC MoU plans (direct quotes) and in order
Kingdom of Saudi Arabia	India
European Union	United Arab Emirates
Republic of India	Saudi Arabia
United Arab Emirates	Jordan
French Republic	Israel
Federal Republic of Germany	Europe
Italian Republic	
United States of America	

Elaborated by authors.

Two segments from East to West

Plans for IMEC, described in a short Memorandum of Understanding (MoU) and launched during the 2023 G20 Summit in New Delhi, were signed by the following parties: Saudi Arabia, the United Arab Emirates (UAE), India, the EU, France, Germany, Italy, and the United States (US) – the only signatory with no explicit cross-border connection to the route. The list of signatories and the list of countries expected to host the main hubs of the corridor also do not exactly match. IMEC is not just one corridor to begin with, it is planned to be two corridors or segments:

one eastern, connecting India to the Gulf – mainly the UAE via a maritime connection, and Saudi Arabia, and one northern, connecting the Gulf to Europe via Jordan and Israel. This duality of corridors is a key parameter to analyse the IMEC project and its implications. So is the order in which the corridor is introduced: connecting India to the West, rather than connecting Europe to the East, is a dominant narrative here. India's lead role in launching the project during its G20 Presidency in 2023 is indicative of the country's weight in the set up and future governance of IMEC.

Table 2. Countries and territories in the predicted IMEC route's two corridor segments, as of late 2023

“East corridor” of IMEC: list of countries and territories in the predicted route	“Northern corridor” of IMEC: list of countries and territories in the predicted route
Asia: India Arabian Gulf: United Arab Emirates Saudi Arabia	Arabian Gulf: United Arab Emirates Saudi Arabia Mediterranean: Jordan Israel Europe: “Europe” Greece

Elaborated by authors.

Exclusive connectivity and disconnect from the peace process

IMEC's planned route is one focused on economic security, securing a greater diversity of supply chains and connections to and from the Indo-Pacific. There are many ways to interpret the route and its motives for non-European partners:

- securing India's rising position as an industrial hub,
- deepening India-Gulf relations,
- balancing India-Middle East-China relations,
- balancing China's influence in the Middle East,
- securing the normalisation of Arab-Israeli relations, and more.

The international launch of an IMEC vision in September 2023 and the subsequent escalation of the conflict in

Gaza into a plausible genocide (ICJ, 2024) or a new Nakba (Eghbariah, 2024) establishes a troubling parallel timeline. IMEC connectivity plans are disconnected from the Middle East peace process. Moreover, the absence of a plan to integrate more Eastern Mediterranean partners into a very exclusive IMEC route leaves little hope for constructive regional connectivity plans. The role and future of the EU and its strategic interests are at stake.

Three IMEC scenarios, three prompts

This paper was drafted following a dedicated foresight session with a group of diverse Euro-Mediterranean policy experts. To facilitate the session and optimise the volume and quality of findings, the reflection was structured around scenarios for IMEC's future by 2040: a date far enough into the future for participants to suspend their disbelief as to their feasibility, yet suitable to reflect

on infrastructure corridors. The three scenarios, introduced through short descriptions in order to make space for participants' imagination, provide varied narratives for the future that do not fall into a binary or Manichean view. The foresight session analysed a) the scenarios' parameters, stakeholders, b) the path to feasibility (backcasting), and lastly c) their likelihood and desirability. A detailed description of the methodology is available in the last section of this paper.

Scenario 1: "Profit-driven IMEC"

The "Commercial" or "Profit-driven" IMEC megaproject of 2040 prioritises security of supply chain resilience above all other objectives. The private sector is the main actor of this commercial endeavour. In this scenario, inclusive sustainable development and the use of connectivity for regional diplomatic and peace processes are a lower priority. An early trend indicating this future has been the highly securitised corridor of the EU's Naval Force ASPIDES defensive maritime security operation, launched in early 2024.

Scenario 2: "Collaborative IMEC"

By 2040, the "Collaborative IMEC" has been designed by all signatory parties, as well as other stakeholders along the planned route. The design and implementation of IMEC is focused on connectivity and sustainable development as drivers for stability. The "Collaborative IMEC" builds on the partners' commitment to the Middle East peace process and overall regional diplomatic processes. In this scenario, stronger dia-

logue with civil society, as well as any dialogue with regional countries that are not part of the signatory group but adjacent to the planned route, has been emphasised throughout the entire process, opening the door to other dialogues.

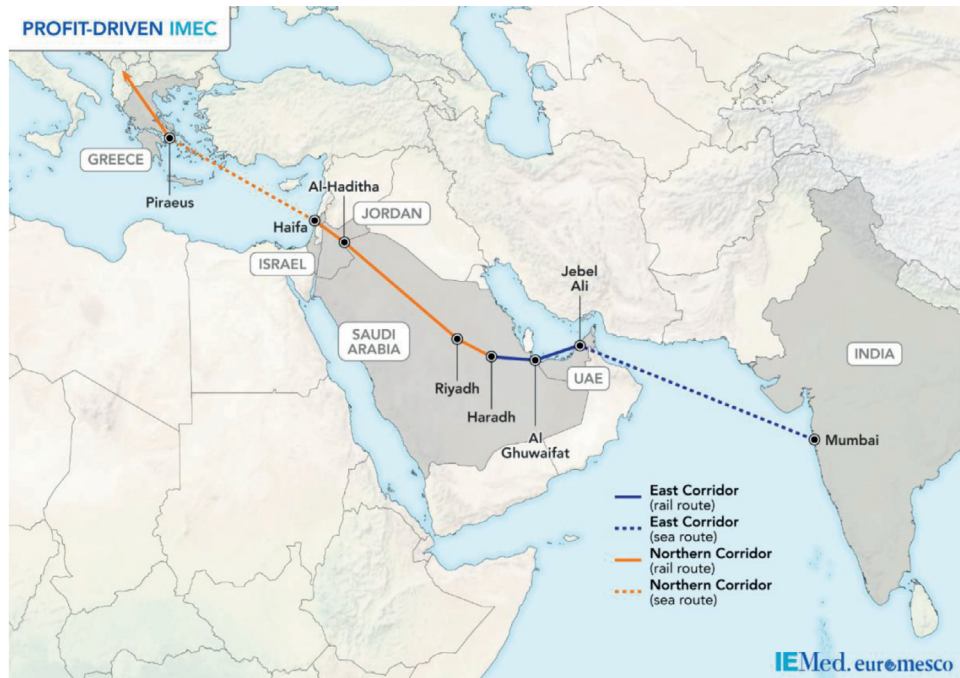
Scenario 3: "No IMEC"

The "No IMEC" scenario refers to a future where the IMEC megaproject has been abandoned. It has not been replaced by a connectivity initiative of comparable scale. Due to a mixture of political, financial and managerial reasons, the EU and the other actors have not proposed an alternative initiative of this scale. In 2040 then, competing connectivity programmes take centre stage. They include primarily China's Belt and Road Initiative, and/or regional infrastructure projects led by countries not included in the original route.

Findings

Profit-driven IMEC: most likely, with strong reservations

A Profit-driven IMEC, designed and governed to prioritise secure supply chains along connectivity routes, is the scenario most aligned with the current states of affairs among the signatories of the 2023 MoU. Therefore, it is the most likely scenario. However, there are major caveats due to the corridor's geopolitical nature, and despite IMEC's economic potential, there are reasons to believe the EU and Eastern Mediterranean partners would stand to lose from its realisation.

Figure 1. Profit-driven IMEC.

Elaborated by EuroMeSCo.

Political vision: a contrasted picture between the two segments

IMEC is a geopolitical project, whose realisation is dependent on the political will of numerous nations, and the relations between them. Foresight analysis shows a contrasted picture between IMEC's two planned different, one from India to the Gulf, the eastern segment, and the other from the Middle East to European shores in the Mediterranean, or northern segment. While the vision for an eastern segment is soundly grounded in a deepening India-Gulf partnership, the vision for its northern segment appears at odds with the geopolitical situation, and at odds with an inclusive vision for Euro-Mediterranean relations. As a result, its prospects are uncertain.

In particular, the prospect of a northern segment is met with scepticism due to the current absence of peace and stability in

and around the tentatively planned route, and the lack of political will and power in the Levant region. Initial IMEC route designs suggest a connection from Saudi Arabia to Israel through Jordan and the Gulf of Aqaba, and from Israel to Greece via a maritime connection. This can be interpreted as circumventing areas of tension or conflict in the region, such as the Red Sea and Occupied Palestinian Territories, but also neighbouring countries including but not limited to Lebanon or Egypt. It can be argued that, in the current state of affairs, in particular Israel but also Saudi Arabia are not exempt from regional and global tensions and conflicts, and their geopolitical behaviour is likely to evolve in the near future. As a result, the route initially designed around supply chain security is no longer the safe political bet it may have been to IMEC MoU signatories in September 2023.

Connectivity considerations: what, where, how

Geopolitical and connectivity considerations are intertwined. In order to delve deeper into the implications of a profit-driven IMEC, it is essential to look at what kind of connectivity corridor IMEC is expected to become and the flows it is expected to carry to destination(s). The “Memorandum of Understanding on the Principles of an India – Middle East – Europe Economic Corridor” of September 2023 includes provisions for a railway “to supplement existing maritime and transport routes,” as well as a “cable for electricity and digital connectivity,” and a “pipe for clean hydrogen export.” Therefore, while the secure transit of goods and services along ship-to-rail routes comes first, digital and energy flows are also key components of the plan, tying into digital governance and energy security concerns of various actors. This multiplicity of flows and sectors adds layers of complexity to the foresight exercise. What standards will be used to build corridor infrastructure, at a time when international technical standardisation is a geopolitical battleground? What will India’s digital governance look like in the future, as data production grows exponentially? Which goods and services would transit to Europe via IMEC and not the Suez Canal? What will the green hydrogen market look like in the next decades, in a region of oil and gas exporters?

Legal, security and sustainability concerns

Picturing and planning connectivity requires considering additional stakeholder categories beyond governments, including the private sector and civil society. In a profit-driven scenario, the private sector of the countries and markets involved is in the driving seat. Governments’ focus would be on providing guarantees to investors, de-risking investments, and regulating trade and procurement. In times of crisis and in-

stability, guarantees for investors would likely be hard to secure and therefore IMEC’s financing could be jeopardised. Another potential concern for IMEC participants who aim to counter or de-risk from evolving Chinese influence in the region would be that a number of Chinese State-owned Enterprises (SOEs) would benefit from an unfair advantage to profit from the new corridor. This comes in addition to China being the biggest greenfield project investor in several Middle Eastern countries such as Saudi Arabia (Emirates NBD research, 2024.)

In addition, a profit-driven scenario separate from a political vision for a regional peace process would require reinforced and permanent security along the route and its infrastructure in order to protect flows and assets. Legal and security concerns increase in conflict areas, with a stronger need for oversight and transparency. Actors like European investors, companies and governments must follow EU and international law. While a regulatory blur around route and infrastructure management would be detrimental to both the financing and the operation of the northern segment, legal and geopolitical repercussions for the EU would also be significant. These concerns are added to general sustainability and justice concerns over who controls and benefits from IMEC infrastructure and struggles over resources amid a regional water and climate crisis. EU action must be aligned with its binding sustainability and human rights commitments to protect its credibility and role as a normative power.

Aggravating regional issues and disparities

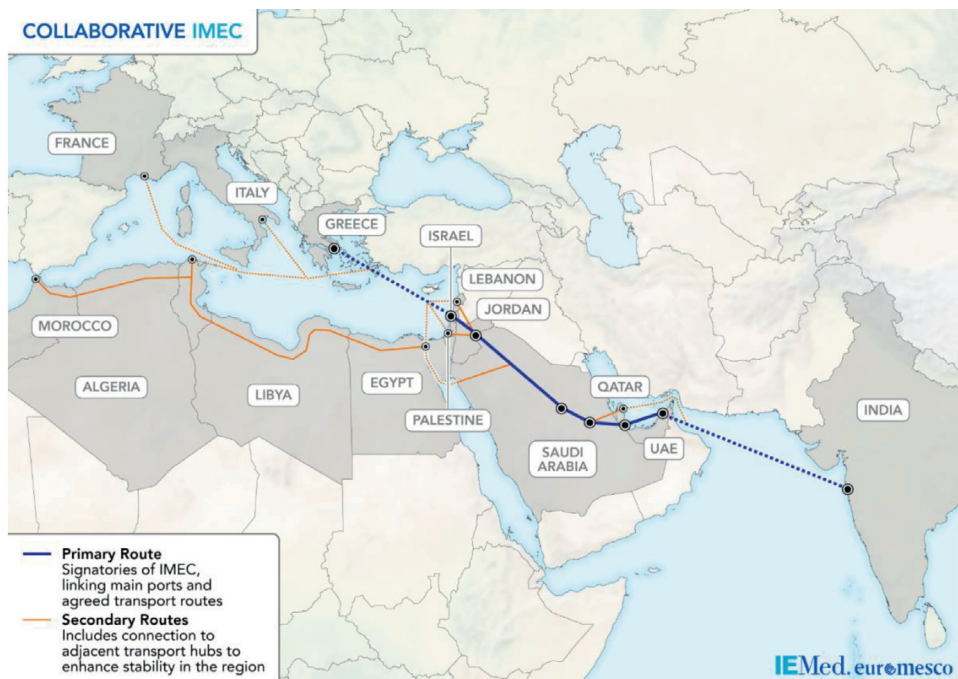
While a profit-driven IMEC scenario is likely, the contrasted geopolitical situation between the eastern and northern segments of the corridors point more precisely to a scenario in which the eastern segment is completed first, focusing primarily on India’s

connection to the Middle East. While this would benefit India's and Gulf countries' economies and global standing, enhancing global multipolarity, the gap with an unstable Levant region would widen, with negative impacts for bypassed countries including Lebanon and Egypt. Israel's connection to the eastern segment is also in question, as it would be beneficial only to itself and not to its Mediterranean neighbours, not to mention for the Palestinian territories, and therefore instability would not be resolved. Without a more diverse route, starting with a political and industrial dialogue on IMEC with

Levant and North African Mediterranean countries, prospects for a sustainable northern segment remain slim. Increasing regional inequalities would likely come with more political unrest and further destabilisation. An aggravated regional situation would in turn further increase the costs of maintaining cross-border corridor security and control, inconsistent with the promotion of peace and stability, as well as with sustainable and just development.

Collaborative IMEC: most desirable, but least likely

Figure 2. Collaborative IMEC.



Elaborated by EuroMeSCo.

Hard to believe, hard to envision

The scenario of a “Collaborative IMEC”, centred around corridor partners’ commitment to the Middle East peace process as well as connectivity and sustainable development as drivers for stability, was deemed

least likely throughout the foresight session. More precisely, it was deemed hard to believe, as a “Collaborative IMEC” would need to be rooted in a sustainable and political plan for peace in the Middle East, far from a solely economic solution.

In order for this unlikely scenario to become feasible, the main obstacles to its realisation were identified. Foresight input was unanimous and clear-cut: along the IMEC route and among IMEC MoU signatories, major political shifts, foreign policy redirection, and/or major regime changes are required. This was emphasised in different ways for the US – as the most influential player in this case –, for Israel, for a future Palestinian state leadership, as well as for major regional players such as Iran.

In addition, there are concerns over Egypt's acceptance of IMEC, as the corridor would compete with the Suez Canal and circumvent Egypt if the planned route remains exclusive. On the European side, the realisation of a "Collaborative IMEC" would require a "re-enlightened", strong political leadership from the EU, and find the leverage to assert such a leadership in the first place. The future of the Team Europe approach is also in question: while IMEC signatories include France, Germany and Italy, an approach involving more member states with differing approaches to the Euro-Mediterranean would probably impact the prospects of an inclusive IMEC.

A real regional dialogue and inclusive connectivity cooperation

For a collaborative and peaceful IMEC to be feasible, the planned exclusive route would be rewired into a more diverse route, with additional maritime and land connections in collaboration with neighbouring countries, including Lebanon and Egypt. It would also require including a future state of Palestine, as well as a political solution and stable connections in the Red Sea. Overall, the route's success would depend on the ability to develop not just main hubs in stable areas, but also secondary hubs and connections through a real economic and political dialogue with unstable states and relevant non-state actors as a way to ensure wider security and stability. Coun-

tries that are ultimately not included in the route could be allowed to take part in peace process and route design discussions, compete to host certain infrastructure compatible with IMEC routes, and take part in broader sustainable development efforts.

A shared framework for a "Collaborative IMEC" would require taking into account the political economy of relevant players and its links to the peace process. Working with partner countries also means understanding what is desirable for both governments and people along the route, taking into account that the private sector would still have a key role in the implementation of an economic corridor. Rather than focusing efforts on turning India into a new industrial hub to supply IMEC participants, the latter could invest in diversified, alternative industrial hubs by supporting countries along the route. This could be done through the European Neighbourhood Policy (ENP) and the EU Global Gateway, by supporting local industrialisation and replicating blue economy initiatives such as WestMED in North Africa to the Eastern Mediterranean region. Expanded connectivity dialogues with Eastern Mediterranean partners beyond energy and migration deals would also participate to reintegrate those policy areas into more cohesive and sustainable Euro-Mediterranean cooperation.

A desirable but challenged future

A future in which the "Collaborative IMEC" scenario is possible relies on a peaceful, broad settlement of conflicts and geopolitical tensions in the Middle East, with global implications. While it is crucial to the foresight exercise to project scenarios decades into the future, the global election year of 2024 is a reminder that the success and political direction of IMEC – including the willingness to engage in peace-building – will be in part determined by the results of

the US presidential elections, as well as European Parliament election results. The narrative around the future of the Euro-Mediterranean region and IMEC as a project will matter, from the language around peace, trade and route diversification, but also human mobility and more. “Collaborative IMEC” would make the corridor a functional route, rather than one built to enhance protectionism.

What about China?

China’s response to IMEC development remains to be seen. It is likely that China will continue its already established partnerships in the Middle East and, if coherent with its objectives, work with IMEC routes to support its own exports to Europe. Both India and China control a number of connectivity hubs along the route, sometimes owning parts of the same port, as in the Israeli port of Haifa (Vinocur, 2023). This extends to Europe, where China controls the Piraeus (Secretariat for Cooperation between China and Central and Eastern European Countries, 2019) port in Greece. IMEC participants will have to strike a sound balance in their relations with India and China, including new BRICS member Saudi Arabia. Saudi Arabia and Gulf countries will also play a key role in dealing with Iran’s reaction to IMEC. It is likely that some level of connectivity cooperation will be a necessary tool for nuclear de-escalation.

No IMEC: undesirable for whom?

Not a replacement for a peace initiative

The “No IMEC” scenario, in which the megaproject is abandoned to some extent and not replaced by a connectivity initiative of a comparable scale, was considered a plausible option rather than a mere scarecrow or exercise of the imagination. The current vagueness around IMEC as a connectivity and geopolitical project, about its scope, as well as the absence of a sub-

stantial peace process to be championed by IMEC participants, have led to this plausibility. With one major caveat: there was a strong consensus on the high likelihood of IMEC’s eastern segment, from India to the Gulf, to be completed. In contrast, without peace and stability along the northern segment’s Euro-Mediterranean route and its neighbourhood as a foundation, few believe in the possibility of sustainable connectivity links. Or it is imagined the project would be plagued by multiplying security risks that would undermine its quality, progress, and the possibility of even starting it in certain geographical locations.

The probability of No IMEC remained an open question and an open debate during the foresight session. An important distinction can be made between the probability, on the one hand, of IMEC’s ambitious project being accomplished comprehensively, from East to West, with every transport, energy and digital transborder connection established – an ambitious and paradigm-changing vision – and, on the other, the probability for specific building blocks or segments of IMEC to encounter major difficulties related to project development, such as project delays, security crises or troubles in social acceptance.

Given the broad geographical net cast by such a project, as well as the geopolitical effort mustered by participants to present it at the 2023 G20 Summit, there are high chances for some level of IMEC activities to be implemented. Key proponents of the project, such as India, are engaged in preparatory activities. For the moment, there is little transparency as to which activities are undertaken, or on the level of international cooperation and mechanisms mobilised in the process. This perspective coincides partly with the profit-driven IMEC scenario, which points to the higher likelihood of a partial, commercial IMEC scen-

ario connecting India to the Gulf and possibly Israel along an exclusive and heavily controlled route.

This calls into question the role of the EU in this area. While an IMEC connectivity project without functioning routes to Europe would by definition not qualify as “IMEC” anymore, this does not necessarily mean that IMEC as a geopolitical project would be completely abandoned in this scenario. Megaprojects such as IMEC operate on a lengthy timeline, giving ample options for participating governments to shape their engagement as well as the narrative around their engagement in IMEC. In other terms, it would probably take several years for any conclusive assessment of IMEC’s northern corridor efforts, during which the narrative around IMEC will continue to be supported by participants.

The relative popularity of the No IMEC scenario provides useful insight, because it is rooted in a common understanding that, without better peace prospects, IMEC benefits for the Euro-Mediterranean region and in particular for the Levant remain unclear. As for the EU and its member states, the No IMEC scenario would be a losing situation with strong opportunity costs.

Coherence with the EU’s Southern Neighbourhood policy

The foreseen lack of benefits resulting from IMEC for the Euro-Mediterranean partnership calls for a closer look at the EU’s cooperation with its Southern Neighbourhood. The partnership remains underdeveloped, with an undeniable hyperfocus on migration and the heightened securitisation of its management (Dimitriadi, 2022), combined with insufficient connectivity investment in the region (Rizzi & Varvelli, 2023). The foundations for broader partnerships, ones that are not based on

border control and the urgency of the EU’s energy supply, are not there.

As detailed in “Collaborative IMEC” scenario findings, neighbouring and participating countries and their economies must benefit from the project to be presented convincingly, taking into account the interest of local populations. Nevertheless, there remains strong scepticism on several aspects of IMEC’s impact, including a possibly aggravating role in the fight against climate change. The reconstruction of pre-existing corridors and investment in locally developed green technologies are deemed preferable. There is also scepticism regarding the development of a functioning green hydrogen market in a geopolitically tense region.

China, Turkey, Iran

The No IMEC scenario implies that competing or alternative connectivity initiatives, such as the Belt and Road Initiative, would expand its engagement in the region. As the management of different political regimes in the region play a significant role in IMEC’s success, China’s lessened attention to the values and policies of partner countries is helping its relationship with Gulf countries to “blossom” (Lons, 2024). Turkey and Iran, which IMEC’s current design bypasses, are also important regional actors that will defend their strategic interests in the connectivity race. Barriers to IMEC may come from these positions, in particular if tensions continue to rise with the US and Israel, whose interests seem inseparable in the IMEC framework. A new Trump presidency would likely escalate this process.

Finding incentives and reducing uncertainty

The No IMEC scenario, its plausibility and its relative desirability, are useful to Euro-Mediterranean participants insofar as it can be a wake-up call. It calls for the redefinition

of IMEC's objectives, involved stakeholders, and profound introspection on the part of the EU concerning its role in the Middle East. There is a responsibility from IMEC signatories to ensure that IMEC does not progress in a worst-case scenario manner, which would be a partial IMEC from India to the Gulf countries, aggravating disparities in the Middle East and escalating the risk of proxy wars and more securitisation. This cause-effect scenario was commonly found plausible by foresight session participants. This is also the worst-case scenario for the EU, which would lose both potential connections to the East and the potential benefits of a stronger Euro-Mediterranean partnership.

Reviewing the IMEC approach and regaining friends in the Euro-Mediterranean region will prove a complex exercise for the EU, whose external action is bound by values. Through IMEC, the EU showed that it can cooperate with partners beyond the like-minded for the sake of its economic security. It is now necessary to connect the dots of the peace process, long-term inter-regional stability, and overall sustainability. Short-term border pacts and highly securitised and under-developed partnerships with Europe's southern neighbours are at odds with a sound connectivity co-operation approach and the prospect of regaining friends in the region.

Policy implications and recommendations for the Euro-Mediterranean

Euro-Mediterranean partners to pay the heavy cost of a partial IMEC

The foresight exercise points to the partial realisation of IMEC as the most likely scenario. Yet, this is the worst possible outcome when taking into account the interests of both sides of the Euro-Mediterranean region. While the vision for a profit-driven

IMEC, designed and governed to prioritise secure supply chains along connectivity routes, may seem to fit the policy priorities of a more geopolitical EU at the moment, its feasibility is challenged by the lack of a common political framework to imagine IMEC. Without a corresponding commitment to the Middle East peace process, without a broadened Euro-Mediterranean partnership and more diversified routes, the northern segment of IMEC is unlikely to become a reality.

Meanwhile, the realisation of the eastern segment between India and the Gulf countries, in the absence of a corresponding segment in the Euro-Mediterranean region, holds more potential negative impacts for the Western segment of the route. While India and the Gulf countries would reap economic and geopolitical benefits and influence, Levant countries excluded from the IMEC route would suffer economically and politically from aggravated regional inequalities, likely to lead to more unrest and conflict. This would go against the EU's interest in securing efficient and sustainable connections between India and its shores. In fact, the EU's strategic interests would be undermined and its potential influence in the Middle East and the Western Indo-Pacific would decrease.

No Collaborative IMEC without a broader Euro-Mediterranean partnership

A more collaborative northern segment for IMEC, with a less exclusive route, open to more functional transport, digital and energy connections across the Mediterranean, is a desirable evolution to avoid the partial IMEC scenario and its detriments. Nevertheless, this scenario relies on a Euro-Mediterranean Partnership (EMP) that would be much stronger and broader than it is now, one that goes beyond migration and energy. In particular, the EU through its Neighbourhood Policy is poised to sup-

port Eastern Mediterranean partners' industrial and connectivity development, taking into account the political economy of relevant players as well as the regional peace process. In this process, which is central to connectivity efforts and aligned with the EU Global Gateway strategy, the EU can expect competition. The need for a renewed vision for cooperation with the Eastern Mediterranean cannot be overstated.

No resilience for the EU without peace and justice in the Eastern Mediterranean

Foresight results emphasise that IMEC, as it is currently planned, is not a replacement for a peace process, for a solid political dialogue and a broader vision to de-escalate conflicts and tensions in the Eastern Mediterranean. In fact, the analysis predicts increased costs and risks for an IMEC without a just peace plan: costs to finance the routes, costs to secure them through military means, with risks to partners' reputation, and increased legal risks. As for countries and populations along the route, included in or excluded from IMEC, high socioeconomic costs can be foreseen. This scenario cannot benefit the EU, which would not only struggle to secure its supply chains, but also find its values and credibility threatened and, sooner rather than later, its own stability.

Conflicts in the Eastern Mediterranean are not new. Nevertheless, the international launch of an IMEC vision at the New Delhi G20 Summit in September 2023 and the escalation of the conflict in Gaza into a plausible genocide (ICJ, 2024) or a new Nakba (Eghbariah, 2024) establish a troubling parallel timeline, and shed light on the fundamental flaws of the G20's connectivity ambitions. Zooming back on the region, the

geographical proximity between EU shores, the Gaza Strip and a planned IMEC connection through the Israeli port of Haifa inevitably lead to the conclusion that Europe's future and its strategic interests are inseparable from a sustainable political resolution, which no amount of Arab-Israeli normalisation or US militarised intervention can solve.

Policy recommendations for the European Union and Team Europe

Raise awareness, among European partners, of the current design of IMEC as a strategic dead-end for EU economic security

- a. Taking into account the current political focus on economic security and competitiveness for Europe, spreading the notion that the current set up of IMEC cannot secure strategic supply chain interests and profitable partnership diversification as initially expected.
- b. Raise awareness that the current design of IMEC will contribute to further destabilisation of the Eastern Mediterranean and increased migration.
- c. Emphasise that IMEC's southern segment in the Arabian Gulf will be developed regardless of EU involvement, with potential negative impacts for the EU.
- d. Emphasise and measure the legal, financial, economic and security risks of engaging in IMEC as it is currently designed.

Commit to the Middle East peace process and diversify the IMEC route

- a. Take into account that achieving a sustainable and just settlement which would truly benefit Europe will require a different foreign policy approach than the US or Saudi Arabia.

- b. Commit to the international rules-based order by calling for Israel's and other partners' full compliance with international law.
- c. Prepare a proposal for the diversification of the IMEC route, both to include a future state of Palestine and to ensure secondary connections to Eastern Mediterranean countries along the route – as part of a sound connectivity project connected to a regional peace plan.

Commit to the Middle East peace process and diversify the IMEC route

- a. Renew the vision for cooperation with the Eastern Mediterranean, refraining from a disproportionate emphasis on migration discourse that does not address the root causes of regional instability.
- b. Invest – including politically – in Eastern Mediterranean partners' industrial and connectivity development, in alignment with Global Gateway principles, as well as taking into account the political economy of relevant players and the regional peace process.

Methodology

Introducing strategic foresight

IMEC is a complex undertaking that brings together many different actors. It is complicated because our world is complex and in constant flux, a status which some future researchers have dubbed “post-normal times” (Sardar, 2010). This means we have to take decisions under complex uncertainty all the time. Strategic foresight is one way of dealing with this uncertainty. The European Commission (EC) defines it as a discipline that explores and anticipates possible future developments. It is not about predicting probable futures, but

about expanding the imagination of possible futures, including the opportunities and challenges they might present. The objective is to anticipate and prepare for different future scenarios, or to shape a preferable future. Meanwhile, an important credo of foresight is that “there are no facts about the future” (Wilkinson, 2017). The main methods of foresight rely on tapping “into collective intelligence in a structured and systemic way” (European Commission, 2024). By bringing together a variety of expertise in interactive formats, future developments are explored and imagined from multiple perspectives.

Scenarios

For this foresight paper, the researchers have sketched three possible futures of IMEC, so-called scenarios, which were discussed at the 2024 EuroMeSCo conference with a group of experts from the EuroMeSCo network from different countries and shores of the Euro-Mediterranean region. Foresight scenarios are rooted in the future, take the form of a narrative description, and “exist in sets that are systematically prepared to coexist as meaningful alternatives to one another” (Spaniol & Rowland, 2019). In sketching these scenarios, the researchers relied on their knowledge of the current plans for IMEC and emphasised contrasting elements between the scenarios.

Three scenarios appeared to be an appropriate amount of possible futures in order to tell the story, while also not falling into the trap of creating “all good” vs. “all bad” narratives (Wilkinson, 2017). The scenario descriptions were kept to a minimum so that the participants were encouraged to use their imagination. The time horizon of the scenarios was selected to be 2040, which is far enough in the future for participants to be able to suspend their disbelief and allow for more creativity. 2040 also

appears to be a realistic timeframe for an ambitious infrastructure project to come to pass.

The main objective of using scenarios was to facilitate a discussion on the potential impacts of different versions of IMEC on a variety of stakeholders and actors, thereby identifying a desirable future for IMEC stakeholders.

The workshop

At the workshop, the three scenarios and the foresight exercise were presented to all participants, before they were split into three groups of fewer than 10 participants each. Each small group had a facilitator present, who guided them through two phases of group discussion.

Phase A focused on coming to a shared understanding of the scenario. First, the groups were given time to read the scenario text and discuss how they understand the scenario. If participants found that crucial elements were missing from the scenario description, the groups negotiated additions and revisions to the scenario under the leadership of the facilitator. The main focus of Phase A was a discussion on the impacts of the scenario on different stakeholders. The guiding question was: “What does this scenario mean for different stakeholder groups?” The groups started by collecting stakeholders before going through them one by one to determine their position and role in the assigned IMEC scenario.

Phase B of the breakout group work was a back casting exercise. This is a common method in foresight where instead of “forecasting”, experts imagine the way from a future scenario back to the present. The groups were asked to identify necessary steps and actions that would enable their future to take shape. The guiding question for Phase B was: “What must have hap-

pened for this scenario to manifest?” The participants were asked to write down their thoughts first before sharing them in the group. Particular emphasis was placed on identifying trade-offs that must have been made along the way.

Finally, all three groups rejoined in a plenary discussion, where each group presented their findings. It was only then that all participants engaged in a discussion on the likelihood and desirability of different scenarios.

Conclusions

The Euro-Mediterranean region is expected to host one of the two segments of the planned India-Middle East-Europe Economic Corridor. Where one segment from India to the Gulf is driven by the rising global status of India’s development as manufacturing and digital hub, and its growing relations with Saudi Arabia and the UAE, the other segment from the Levant to Europe is sketched over strained partnerships and armed conflicts. The gaps between this situation and the prospects of a secure economic corridor reaching Europe via the Middle East offer key policy takeaways and recommendations for course correction.

Findings are clear-cut: “profit-driven IMEC” is a dead end, just as likely to materialise from India to the Gulf as to negatively impact the Euro-Mediterranean region and aggravate its crises; “Collaborative IMEC” is a hardly-conceivable holy grail that requires political courage to commit to the Middle East peace process and restore Euro-Mediterranean partnerships; and an ambiguous “no IMEC” future has the merit of not being the worst-case scenario for a majority of the EU’s Mediterranean partners.

The EU will pay the cost of its inaction if it does not use its leverage to correct the

course of IMEC's Euro-Mediterranean plans. Key policy recommendations include the need to raise awareness, among European partners, of the current design of IMEC as a strategic dead end for EU economic security, the necessity to commit to the Middle East peace process and diversify the IMEC route, and the fleeting opportunity to renew and broaden the Euro-Mediterranean partnership as a foundation for connectivity.

The sense of urgency in these streams of actions is mainly due to two key parameters of high importance to the EU's near future. One is a highly-politicised focus on the continent's economic security, with a strong official narrative supporting broad de-risking from China across critical supply chains. The other is the conflict in Gaza, having escalated into a plausible genocide or new Nakba and creating deep geopolitical divides among EU member states. The advisory opinion issued by the International Court of Justice (ICJ) on 19 July 2024, which finds

Israel responsible for segregation and apartheid, should contribute to the general sense of urgency.

While these burning issues cannot be ignored, their haphazard management on a Euro-Mediterranean level prevents the EU from even beginning to look at the other, numerous and complex questions attached to IMEC's future. What standards will be used to build corridor infrastructure at a time when international technical standardisation is a geopolitical battleground? What will India's digital governance look like in the future, as data production grows exponentially? Which goods and services would transit to Europe via IMEC and not the Suez Canal? What will the green hydrogen market look like in the next decades, in a region of oil and gas exporters? While all these questions deserve expert attention, IMEC's impact on the EU remains first and foremost tied to the Union's capacity to thoroughly reassess its role and responsibilities in the Eastern Mediterranean.

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